Conversion Tips for the New Banner… / Things to watch out for

Menus/Tools (Old Drop Down Menus)

File Edit Options Block Item Record Query Tools Help
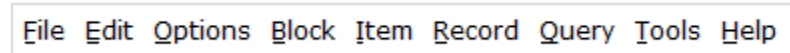
Options and other menus have moved. If you used to click a menu in INB, look under the "Tools" (gear icon) (Alt+Shift+T) or "Related" button (relationship icon – Alt+Shift+R). Both buttons are at the top right of the screen.
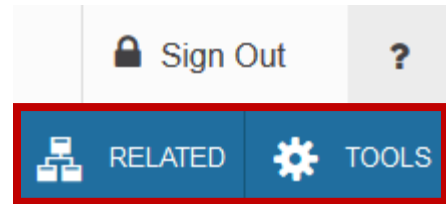
For Example: The old "Options > Next Action" is found under Tools > Options > Next Action.

Search/Filter F7

F7 uses a new screen for searching/filtering. If you've already entered search criteria, pressing F7 doesn't always clear those filters, but sometimes leaves the filters you've previously entered. F8 still works to apply your search/filter criteria.

Next Block/Section (Alt+PageDown)

Keyboard users, the new keyboard shortcut Alt+PgDn should work anytime you used to use "Next Block".

Mouse users, there are also new buttons on the bottom left of the window that allow you to go to the previous (Alt+PgUp) or next (Alt+PgDn) block.

Note about GO, If you previously hit next block **only once** on a form, you can use the green "Go" Button near the top right (or Alt+PgDn). If you used to hit next block multiple times, the "Go" button only works for the first "Next Block" action. To further get to the "Next Block" use Alt+PgDn or the buttons on the bottom right of the window. After going into the record(s), the green "Go" button (top right) changes to "Start Over" (F5) which functions like the old "Rollback".
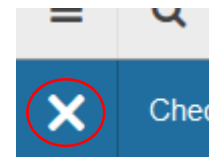
Rollback/Start Over (F5)

You can now click "Start Over" (Top right where the "Go" button often is) or use the new keyboard shortcut F5 to perform what used to be called "Rollback".
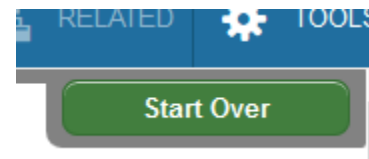
Closing a Page

The X to close a page has moved to the top left. You can also use the keyboard shortcut Ctrl+Q.

Notifications

Warnings and Errors now pop up in the top right corner of the screen. Watch out, they will cover the start over / go button and other things in that corner of the screen until you dismiss the notification (click the number in the top right corner).

WARNING A duplicate transaction, 1065281, for this person exists for this approval category at Waiting status.