

# Navigating the Banner Landing Page

## Quick Reference Guide

Education  
Services

### Accessing Banner

Use your unique **User Name** and **Password** credentials to log in.

### 1) Page Access

On the Banner landing page, access Banner pages using the:

- **Menu** icon: View menus of your institution's Banner, My Banner, and Banner Self-Service applications.
- **Search** icon: Enter a key word(s), partial page name, or seven-letter code.
- **Search** field: Enter a key word(s), partial page name, or seven-letter code.

### 2) Basic Navigation

View the user's **Log In Name** or click the **Sign Out** icon to exit the application. Click the **Help** icon (question mark) to display detailed page information. **Help** is active only when a page is open.

### 3) Keyboard Shortcuts

View a partial list of handy keyboard shortcuts. With the exception of **Sign Out**, use these keyboard functions like a toggle switch to open and close the specific page element.

**Display Menu:** Ctrl+ M

**Display Recently Opened Items:** Ctrl+ Y

**Display Dashboard:** Ctrl+ Shift + X

**Search:** Ctrl+ Shift + Y

**Help:** Ctrl + Shift + L

**Sign Out:** Ctrl + Shift + F

# Navigating Banner 9 Pages

## Quick Reference Guide



### Navigating Banner 9 Pages

#### 1) Page Header Elements

Provides easy access to key functions including:

- **X** icon: Close the page
- **ADD / RETRIEVE** icons: Used with Banner Document Management.
- **RELATED** icon: Displays a list of pages related to the open page. Select from the list or **Search** for a specific page.
- **TOOLS** icon: Perform standard actions and options for the page currently displayed. Formerly the **Options** menu in Banner 8.

#### 2) Key Block

Only the page's key block displays initially. Enter required information, then click **Go** to activate the page.

#### 3) Page Elements

The key block collapses and **Go** is replaced with **Start Over** (formerly **Rollback** in Banner 8).

- **Tabs**: Organizes information by content area. Active unless grayed out.
- **Sections**: Known as blocks in Banner 8, sections (denoted by gray bars) provide additional details about the key block information. When active, actions such as **Insert**, **Delete**, **Copy**, and **Filter** can be performed for each section.

Ellucian University | Lisa Marie Brown | Sign Out

General Person Identification SPAIDEN 9.3 | ADD | RETRIEVE | RELATED | TOOLS

ID:  ... + **Go**

Get Started: Fill out the fields above and press Go.

ID: N00021849 BECKER, CATHERINE | **Start Over**

Current Identification | Alternate Identification | Address | Telephone | Biographical | E-mail | Emergency Contact | Additional Identification

**IDENTIFICATION** | + Insert | - Delete | Copy | More Information | Filter

ID: N00021849 | Name Type:  ...

**PERSON** | + Insert | - Delete | Copy | More Information | Filter

Last Name:  ... | Prefix:

First Name:  ... | Suffix:

Middle Name:  ... | Preferred First Name:

Full Legal Name:

Activity Date: 05/20/2015 11:34:50 AM | **SAVE**

EDIT | Record: 1/1 | SPRIDEN\_CURRENT.PERS\_LAST\_NAME [1] | ellucian

#### 4) Page Footer

Provides access to additional navigation tools and information.

- **Next Section / Previous Section** icons: Known as **Previous Block** or **Next Block** in Banner 8, use these icons to move between sections or tabs on a page.
- **Save** icon: A major difference between Banner 8 and Banner 9, the **Save** button is located at the bottom of the page.
- **Record Count**: Indicates the number of records displayed.
- **Table/Field Name**: Displays at the very bottom of the page for quick reference.

## Searching For and Filtering Data

### Quick Reference Guide



#### Performing a Lookup

The **Lookup** icon allows you to quickly search for a value for a field.

1. Click the **Lookup** icon in the field.

2. Type a value in the **Criteria** field, then press **Enter**.
3. In the list of options, highlight the value by selecting it, then click **OK**. Or, double-click on the correct value to return it to the field.

Code	Desc	Citizen
EL	Eligible Citizenxxxxxxxxxxxx	N
N	Non-Citizen	N
NR	Nonresident Alien	N
RA	Resident Alien	N
WW	Worldwide	N
Y	Citizen	Y

#### Filtering Data

You can filter, or query, data in a section by clicking the active **Filter** icon in the section header. In some cases, when you click the **Lookup** icon, you will be presented with the Filter window as well.

1. Click the **Add Another Field...** drop-down arrow and choose the field on which you want to filter. *If you want to return all records in the system, do not enter any filter criteria. Just click **Go**.*
2. Click the **Operator** drop-down arrow and select an operator, as needed. *The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).*
3. Enter a value for the field you selected (in the field to the right of the **Operator** field).
4. Repeat steps 1 – 3 until all filter criteria are entered.
5. Click **Go** to display the results. *To return to the page without filtering, click **Cancel**.*
6. Click the **Filter Again** button (on the Search Results window) if you want to perform another filter.