Navigating the Banner Landing Page
Quick Reference Guide

Education
Services

Accessing Banner

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

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Sign in to your account

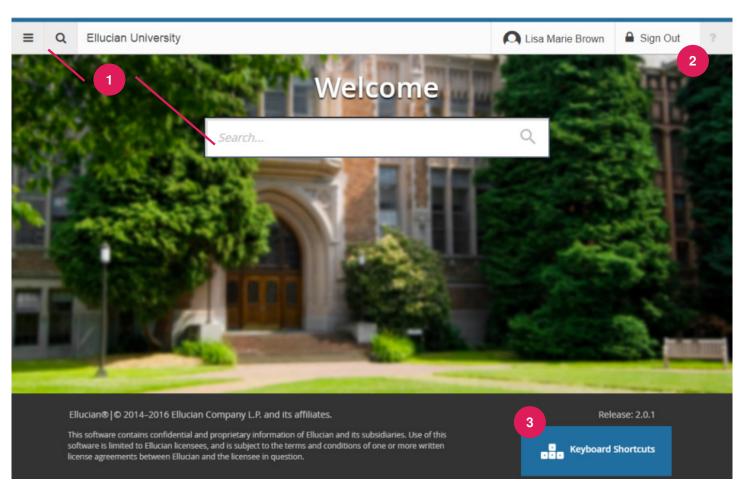| User Name |
| Password |

☐ Stay Signed In

Sign 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.
- **Searc**h 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.*

☰ 🔍 Ellucian University — 👤 Lisa Marie Brown — 🔒 Sign Out — ?

1   **2**

Welcome

Search... 🔍

3

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⊞ Keyboard Shortcuts

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

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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.*
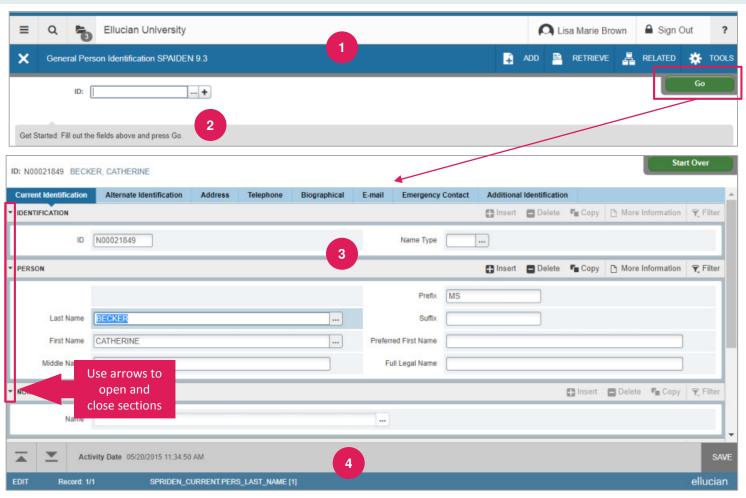
2) Key Block

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.

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.

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Searching For and Filtering Data
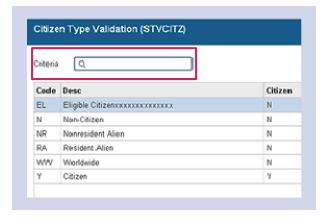## Quick Reference Guide

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.

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.