Navigating the Banner Landing Page
Quick Reference Guide

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

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.
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.

   ![Citizenship lookup](example.png)

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.