Navigating the Banner Landing Page
Quick Reference Guide

Accessing Banner
Use your Bear ID and password to log in.

1) Page Access
On the Banner landing page, access Banner pages using the:
- **Toggle Menu** icon: view menus for Banner, My Banner
- **Applications** icon: view menus for Banner, My Banner
- **Search** icon: Enter a key word(s), partial name page, or seven-letter code.
- **Search** field: Enter a key word(s), partial page name, or seven-letter code.

2) Sign Out
Click the **Sign Out** icon to exit the application.

3) Help Icon
Click the **Help** icon (question mark) to display a partial list of handy keyboard shortcuts. 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 the Banner 9 Pages
Quick Reference Guide

Navigation Banner 9 Pages

1) Page Header Elements
   Provides easy access to key functions including:
   - X icon: close the page
   - 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 the required information, then click Go (or Alt+PgDn) to activate the page.

3) Page Elements
   They 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.

2. Type a value in the Criteria field, then press Enter.

3. In the list of option, 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. 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, data, 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.