

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.

The screenshot displays the Banner 9 user interface for a person identification record. The page header (1) includes the Baylor University logo, a search bar, and user information. The key block (2) contains an ID field and a 'Go' button. Below the key block, the 'PERSON' section (3) is active, showing fields for Last Name (Jones), First Name (Barbara), Middle Name, Prefix (Ms.), Suffix, Preferred First Name (Barb), and Full Legal Name. A 'Start Over' button is visible in the top right of the key block area. The page footer (4) displays activity date, user, and record count information.

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	EDI Equiv
N	Non-Citizen	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. 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.