

## Navigating the Banner Landing Page

### Quick Reference Guide

Education  
Services

#### Accessing Banner

Use your **LTU Campus User Name and Password** 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: Not used at LTU.
- **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.

The screenshot displays the Ellucian Banner 9 interface for a 'General Person Identification' page. Key elements are numbered 1 through 4:

- 1**: Points to the top navigation bar containing the user name 'Lisa Marie Brown' and 'Sign Out' link.
- 2**: Points to the search field and the 'Go' button.
- 3**: Points to the 'Current Identification' section of the form, which includes fields for ID, Name Type, Last Name (BECKER), First Name (CATHERINE), Middle Name, Prefix (MS), Suffix, Preferred First Name, and Full Legal Name.
- 4**: Points to the bottom footer area showing the 'Activity Date' (05/20/2015 11:34:50 AM), 'Record: 1/1', and the 'ellucian' logo.

A red box highlights the 'Go' button, and a red arrow points from it to the 'Start Over' button. A pink callout box with an arrow pointing to the 'IDENTIFICATION' section header says 'Use arrows to open and close sections'.

### 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.