



# Banner Navigation Guide

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This document covers fundamentals such as standard layouts of pages, using buttons or keyboard shortcuts for navigation and how to most effectively use searchers and filters to find specific data.

Banner is the Ellucian's ERP (enterprise resource planning) system, which is a fancy way of saying it is the centralized system that most colleges use to support the business of running their institution. Everything from awarding financial aid, helping a student register for classes, or paying the college's bills is done in Banner.

Ellucian, a company that focuses on higher education software, provides Banner to college campuses. You may also hear the terms "SSB (or Self-Service Banner or Banner Self-Service)" or "Application Navigator (or App Nav)"; these are just two different ways Banner has of presenting information to the user. Generally, most people are working in SSB when they are using Banner, but staff and faculty who have higher-level access to college data will use Application Navigator.

## Application Navigator

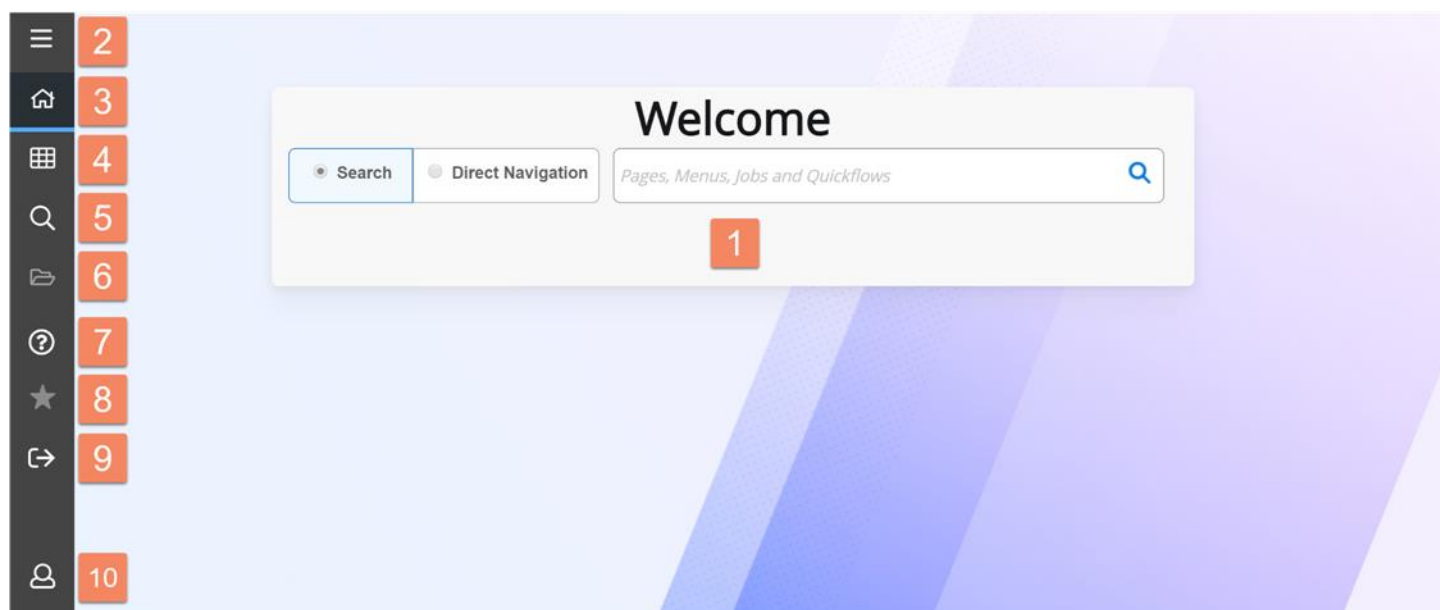
### Accessing Banner

Log on to Banner by using your unique User Name and Password.



### Banner Dashboard (Home Page)

Upon successful login, the Banner Dashboard will display and will look similar to the below example. The Dashboard mainly consists of a search field and a global navigation menu available throughout Banner. The table that follows the example provides a brief description of each numbered area.



Area	Description
1	Main search bar. Displays suggestions as you search or directly navigate to a specific Banner page
2	Toggle main menu descriptions
3	Return to Banner Dashboard (the Welcome screen shown above)
4	Displays Applications, My Banner, and My Links menu
5	Global search or directly navigate to a specific Banner page
6	Displays recently opened pages for quick access (when available)
7	Help page (when available) and navigation menu keyboard shortcuts
8	List of pages added to Favorites
9	Sign out of Banner
10	User Profile. Displays current user, access Banner messages, and view preference settings

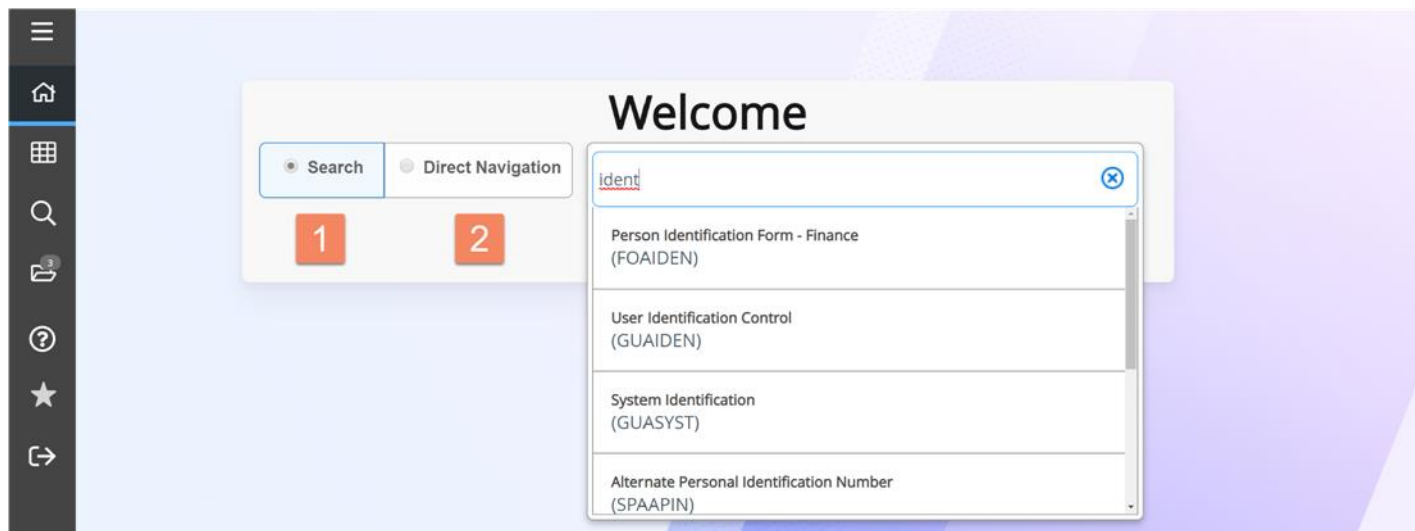
## Toggle Menu and Home

Click the Toggle Menu button (1) to hide or display icon descriptions in the global navigation menu. Click the Home (2) to display the Dashboard Welcome page again



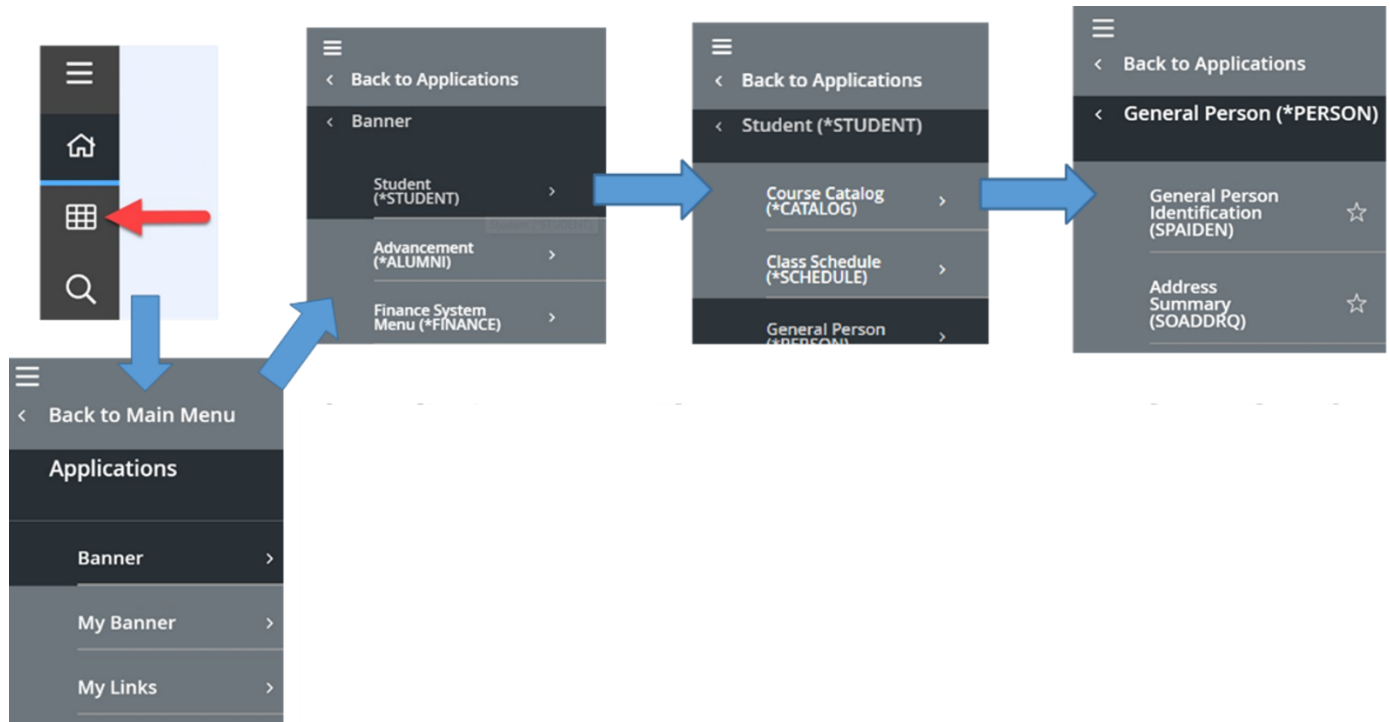
## Search Bar

The search bar provides two methods for accessing Banner pages. If the Search option **1** is enabled, results will display as you begin typing in the name or description of the page. If the Direct Navigation option **2** is enabled, Banner will access the page name as typed, no search is performed.



## Applications Menu

Clicking the Applications icon in the navigation bar (or Ctrl-M on your keyboard) will display the Banner main menu at the top level. See the below menu navigation example.



The Application Menu provides user access to Banner systems and pages through a series of folder levels, based on user job responsibilities and locations.

General Steps:

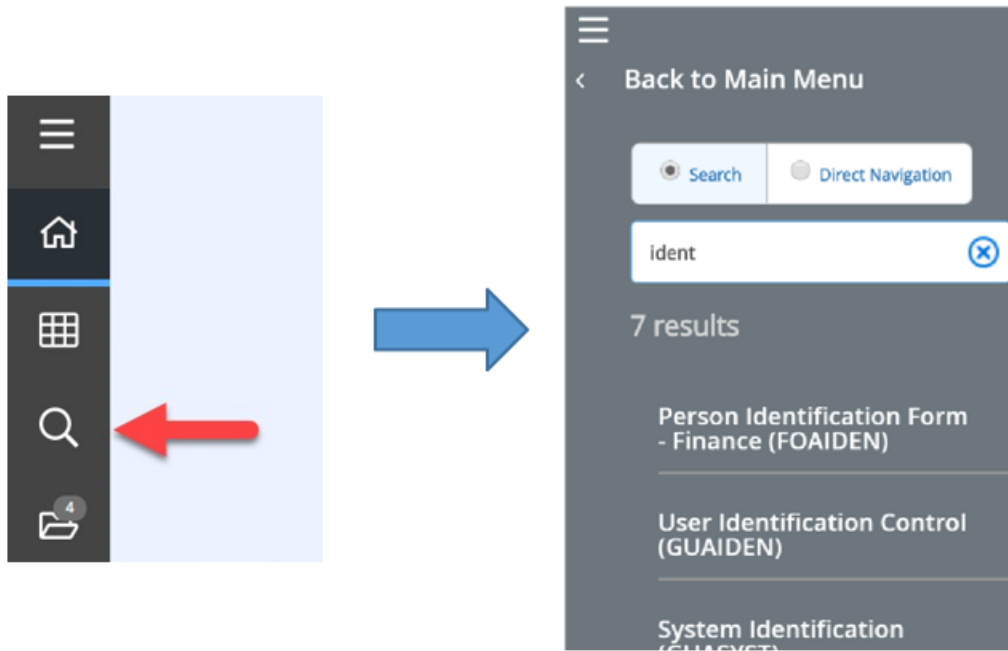
1. Click on the Banner title to display the available Banner modules.
2. Click on a module title (Student, Finance, etc.) to view module section.
3. Click on a category title to view the available Banner pages.
4. Click on a Banner page title to display

A Banner page can also be to the Favorites list by clicking the star icon next to the page name. See the Favorites section later in this document for more details.

Also included in the Applications menu is My Links, where you can create custom links. The customizable links can directly access other Banner pages or web addresses. Select Manage My Links link in the My Links menu to for more information and settings.

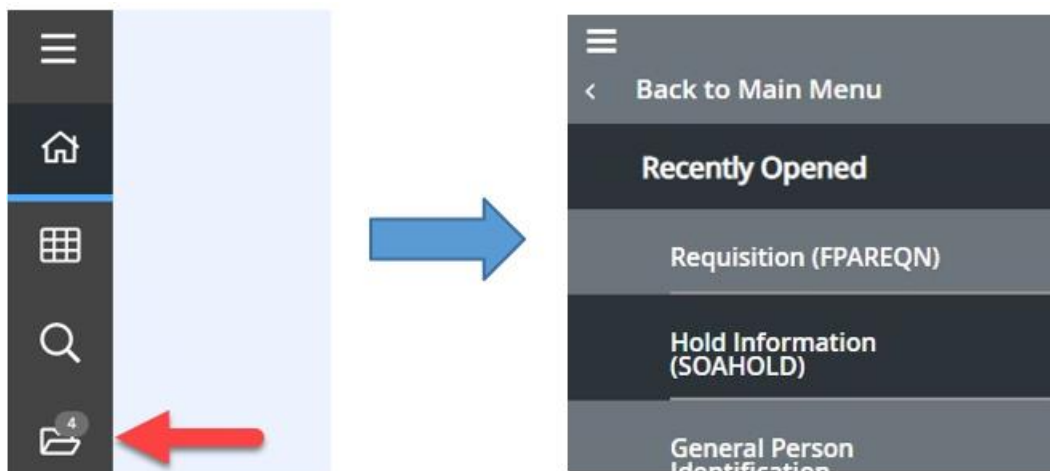
## Global Search Bar

A search bar is also available in the global navigation bar. This search bar performs in a similar manner to the main page search field.



## Recently Opened Pages

Click the folder icon in the global navigation menu to display a list of recently opened pages. Point and click on a page in the list to access. This icon appears after the first page is opened during the current session.



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At the bottom of the listing, there is an option to manage open pages by clearing those not needed anymore.



The Clear link will remove any previously closed pages. A message will display if there are no closed pages. To close an open page, navigate to the page and click the X button in the top left corner.

Currently open pages remain in your recently opened folder after a "Clear Recently Opened" action. Only closed pages can be removed from history.

## Help Page

Online help is available on most Banner pages by clicking the ? icon in the global navigation menu. The Banner General Online Help page will open in a separate web browser tab and displays the available help information for the page/screen that is currently active.

The diagram shows the process of accessing help. It starts with a question mark icon in the navigation menu. A red arrow points to the 'Help' menu, which contains options like 'Back to Main Menu', 'Help', 'Page Help', 'Application Navigator', and 'Keyboard Shortcuts'. A blue arrow points from the 'Help' menu to a screenshot of the 'General Person Identification (SPAIDEN) page' help content. A red arrow points from the question mark icon to the 'Help' menu, and a blue arrow points from the 'Help' menu to the help page screenshot.

The screenshot of the help page shows the following content:

**General Person Identification (SPAIDEN) page**

Use the General Person Identification page to capture biographic/demographic information for all persons/non-persons associated with the institution.

Persons/non-persons may belong to any or all of the installed applications (Banner Student, Banner Finance, etc.). All persons/non-persons are first entered into the database using this page. The information maintained in this page is specific to the person/non-person and does not relate to the person's/non-person's involvement at the institution. All other modules/applications are dependent on the information captured and maintained in this page. Any changes or additions to a person's/non-person's biographic/demographic information must be made in this page.

You can access the Common Matching Entry (GOAMTCH) page from SPAIDEN to enter information for a new ID and then execute the matching process before a new PIDM is created in Banner®. To do this, turn on Common Matching for the institution using the **Online/Matching Process Enabled Indicator** on GUAINST. In addition, the user attempting to access GOAMTCH must not have been excluded from using it on GOFCNLS. If user has been excluded from Common Matching on GOFCNLS, the user can access GOAMTCH from the Banner menu system.

To open GOAMTCH from SPAIDEN, enter 0000010 in the ID field, select the **Generate ID** button, **enter** an ID in the ID field that does not exist in Banner. The GOAMTCH page will automatically be displayed. If a person record is created using only the GOAMTCH page, the **Origin** field on SPAIDEN and SPRIDEN will be set to GOAMTCH. If the person record is created using SRSRRN or SRPRKL, then the **Origin** field will be set to SRPRKL.

You can search on person last and first names and non-person names by text to see if similar names exist. Use the **Search** feature from the **LastName** and **FirstName** fields to view similar names on the Person Search (SOAIDEN) page. Use the **Search** feature from the **Non-Person Name Information Name** field to view similar names on the Non-Person Search (SOACOMP) page.

You can view the user ID and the page or process which created that name/ID record in the ID and Name Source section.

**Main window:**  
The main window contains the key block and the Current Identification section.

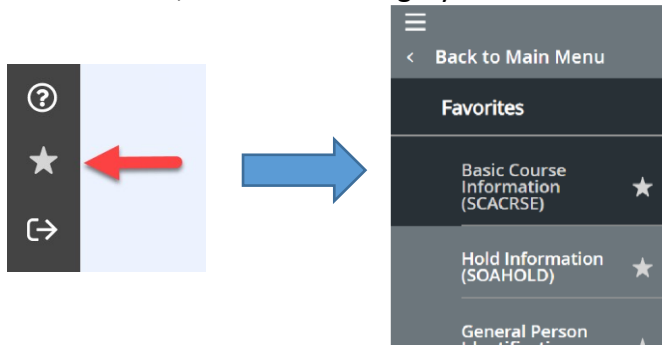
Area	Description
1	Navigation area displaying all available Banner pages with help information
2	Content area displaying help information for the selected Banner page
3	Global search bar. Available on all screens
4	Print help information for the selected Banner page

## Keyboard Shortcuts (App Nav Icons Only)

To view the available keyboard shortcuts, click on the Application Navigator Keyboard Shortcuts link in the Help menu. These shortcuts are available anywhere in Banner.

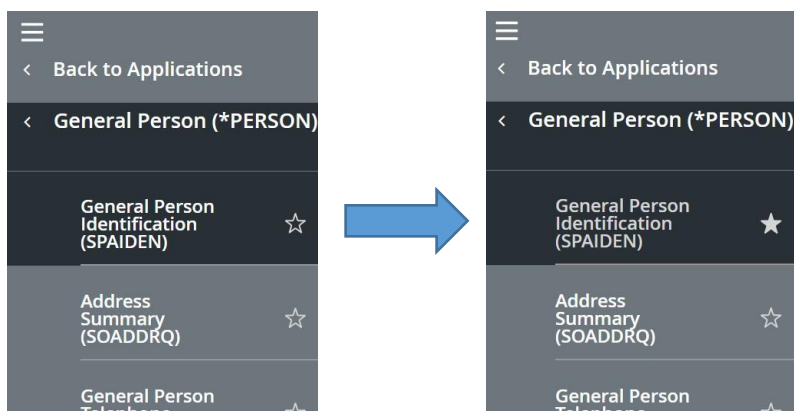
## Favorites

Click the Favorites icon to display a list of Banner pages that are currently favorited. If no pages are favorited, the icon will be grayed out.



Follow these steps to favorite a Banner page:

1. Click on the Applications icon in the navigation menu
2. Using the menus, navigate to the specific page you wish to favorite
3. Locate the star icon next to the name of the page and click on it (also see note below)
4. Close the Applications menu and click the Favorites icon to verify the page appears in the list



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Note: If the star icon is already white, no further action is necessary. The page is already in Favorites.

The keyboard shortcut for Favorites is CTRL+D. The shortcut is only available with the Dashboard displaying. The same shortcut within a Banner page will bring your web browser's Bookmark Page feature.

## Banner Log Out

Click the Sign Out button located near the bottom of the global navigation menu to securely log out of Banner. A message will display once logout is complete. You can close your browser at this point.



## Basic Navigation

### 1. Key Block and Page Header

Only the page's key block displays initially. Enter required information, then click Go to activate the page. The page header 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. Page Elements

The key block collapses and Go is replaced with Start Over (formerly Rollback in Banner 8).

- Tabs: Organize information by content area. Tabs are active unless grayed out.

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- Sections: Sections (denoted by gray bars) provide details about the ID/Code in the key block. When active, actions such as Insert, Delete, Copy, and Filter can be performed.  
Note: If Supplemental Data Engine is enabled, a More Information icon displays.

General Person Identification 9.3.10 (Core-PRD)

ID: A00037960 BELL, DAINEL

ADD RETRIEVE RELATED TOOLS

Start Over

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification

IDENTIFICATION

ID: A00037960 Name Type: BRTH Birth Name

PERSON

Last Name Prefix: Last Name: BELL First Name: DAINEL Middle Name: Preferred: Full Name:

Use arrows to open and close sections.

Additional functions when section is active.

ID AND NAME SOURCE

Last Update Origin: SPAIDEN

Original Creation User: HRISUSR Create Date: 09/15/2017

Activity Date: 09/15/2017 07:45:45 AM Activity User: HRISUSR

EDIT Record: 1/1 SPRIDEN\_CURRENT.SPRIDEN\_ID [1] ellucian

### 3. Page Footer

The 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.

Activity Date: 09/15/2017 07:45:45 AM Activity User: HRISUSR

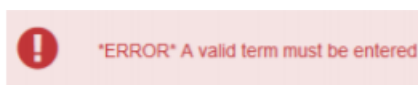
Record: 1/1 SPRIDEN\_CURRENT.SPRIDEN\_ID [1] ellucian

SAVE

### 4. Notification Center Messages

You may see four message notification component types when working in Banner 9:

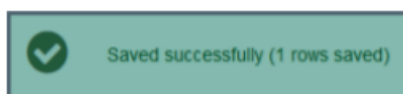
- **Error Notification** – Will display a “!” in a circle when message is displayed



- **Info Notification** – Will display an “i” in a circle when message is displayed. May display an OK button that you must select to continue.



- **Success Notification** – Will display a checkmark in a circle when message is displayed.



- **Warning Notification** – Will display a “!” in a yield sign when message is displayed. Will also display two buttons, Yes/No, that must be selected to continue.



## Data Display Options

### 1. Required Fields

An asterisk (\*) displayed next to a field name indicates that the field requires a value before you continue on the page. The system uses the definition of the field as it is used in the application to determine if it is required. For fields that have conditional logic that determines whether they are required, the asterisk (\*) is not displayed. If you leave a section or a page without entering information in a required field, the page notifies the individual in the Notification Center, requiring the user to perform some additional action.

Account Title \*

## 2. Sort Order

In a grid layout, values for a field can be sorted and, if you have chosen to sort the data, an up or down arrow next to the field name indicates the current sort order for the field. You can click the field label to reverse the sort order.

Major Code *	Description *	CIPC	Major	Minor	Concentration	Occupation	Financial Aid Eligibility	Voice Response Message Num
079B	AYA Integrated Languag...	131305	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
079A	AYA Integrated Mathema...	131311	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
079D	AYA Integrated Science	131316	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
079C	AYA Integrated Social St...	131318	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0298	Accountancy	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
M063	Accounting	520301	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
0300	Accounting	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0T01	Accounting	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0356	Accounting Technology	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0900	Accounting Technology	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0301	Accounting and Finance	520304	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
M111	Actuarial Science	450601	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
071H	Adolescent and Young A...	131205	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0G24	Adu Gero Acute Care Nu...	513805	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
0687	Adu Gero Acute Care Nu...	513814	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0310	Adv and Public Relations	090903	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

## 3. Dates

You can either enter the date directly or use the calendar icon for date selection. The date format is mmddyyyy. To enter the current date, type any letter and [TAB].

The screenshot shows a date selection interface. A red circle highlights the calendar, and a red arrow points to the 'Today' button. The date format is mmddyyyy.

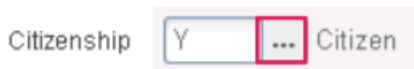
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## 4. Performing a Lookup

The **Lookup** icon allows you to quickly search for a value for a field. Note that not all fields have Lookup icons.

1. Click the **Lookup** icon in the selected field.



2. A list of values displays. To narrow the results, type a value in the **Criteria** field, then press **Enter**.
3. To return a value to the selected field, highlight the correct value and click **OK**. Or, double-click on the correct value to return it to the field.

Citizen Type Validation (STVCITZ)

Criteria

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

## 5. Filtering Data

You can query data in a section by clicking the active Filter icon in the section header. Note that in some cases, when you click the **Lookup icon**, you will be presented with the Filter window as well.

There are two filter types: Basic and Advanced.

**Basic Filter (default):** Use the **Basic Filter** to specify search criteria using pre-defined search fields.

1. In the fields that display, enter or select a value for each field on which you want to search. To return all records in the system, just click Go without entering any filter criteria. You may add basic operators when entering data in text fields (see below).
2. Click Go to display the results.
3. Click the Filter Again button (on the Search Results window) to further refine your search.

**Advanced Filter:** Use the Advanced Filter to specify filter data using SQ type operators.

**Advance filters** use Boolean operators to help narrow the search results.

1. For each field on which you want to search, click the **Operator** drop-down arrow and select the appropriate operator. The available operators depend on the type of field selected (numeric, alphanumeric, date, check box, or other).
2. Enter a value for the field you selected (in the blank field to the right of the **Operator** field).
3. Repeat steps 1 – 2 until all filter criteria are entered.
4. Click **Go** to display the results.
5. Click the **Filter Again** button (on the **Search Results** window) to refine your search results.

## 6. Related Menu

Related Menu: displays a list of pages that can be accessed from this page.

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General Student SGASTDN 9.3.9 (TEST0312)

ID:  Student Summary

Donaldson, Rosalyn S.

Term:  View Current/Active:  Curricula

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search

Search

- Student Mail [SUAMAIL]
- All Learner Curricula [SOILCUR]
- Graduation Application [SHAGAPP]
- Degrees and Awards [SHADEGR]
- Assign Advisors to Student [SGAADVR]
- Student Cohorts and Attributes [SGASADD]
- High School Information [SOAHSCH]
- Prior College Information [SOAPCOL]
- Sports Participation by Term [SGASPRT]

## 7. Searching for a Person

Provided you know the name of the person, there is another person search option.

1. Click in the ID field and press Tab on your keyboard.
2. In the blank field that displays, enter the person's last name. Press Tab again.
3. The ID and Name Extended Search window displays. You can narrow your search results by entering additional information in the fields provided.
4. Click the Press to See Results button. 5. Select the correct record, then click OK.

ID and Name Extended Search

Search Detail

Person/Non-Person Count 5

Reduce Search By

Group Type  Person  Non-Person  Both

City

State or Province

ZIP or Postal Code

Name Type

Birth Date

Gender

Press Enter Query or select button to clear search.

Enter search criteria then press Execute Query or select button to reduce search.

## Appendix

### Buttons

Banner admin pages include several buttons.

Button	Description
Add and Retrieve	Use the Add and Retrieve buttons to interact with Banner Document Management (xTender) to properly store and review documents.
Go	Use the Go button to advance to the body of the page after populating the key block.
Save	Use the Save button to save changes on the page. The Save button is located on the bottom right side of the page.
Section Navigation	Use the Next Section button to navigate to the next section of data. Use the Previous Section button to navigate to the previous section of data. The Next Section and Previous Section buttons are located at the bottom left of each page.
Select and Cancel	Use the Select button to select and retrieve data from a called page to the current page. Use the Cancel button to return to the called page without retrieving any data. When you need to go to a secondary or called page to retrieve data, the Select and Cancel are presented at the bottom of the page.
Start Over	Use the Start Over button to return to the key block of the page.

## Banner Keyboard Shortcuts

Action	Keystroke
Cancel Page, Close Current Page, or Cancel Search/Query	Ctrl + Q
Change MEP Context	Alt + Shift + C
Choose/Submit	Enter
Clear All in Section	Shift + F5
Clear One Record	Shift + F4
Clear Page or Start Over	F5
Count Query	Shift + F2
Delete Record	Shift + F6
Down/ Next Record	Down Arrow
Duplicate Item	F3
Duplicate Selected Record	F4
Edit	Ctrl + E
Execute Filter Query	F8
Exit	Ctrl + Q
Expand/ Collapse Drop Down Field	Alt + Down Arrow
Export	Shift + F1
First Page	Ctrl + Home
Insert/ Create Record	F6
Last Page	Ctrl + End
List of Values	F9
More Information	Ctrl + Shift + U
Next Field or Item	Tab
Next Page Down	Page Down
Next Section	Alt + Page Down
Open Menu Directly	Ctrl + M
Open Related Menu	Alt + Shift + R
Open Tools Menu	Alt + Shift + T
Page Tab 1	Ctrl + Shift + 1
Page Tab 2, etc.	Ctrl + Shift + 2
Previous Field or Item	Shift + Tab
Previous Page Up	Page Up
Previous Section	Alt + Page Up
Print	Ctrl + P
Refresh or Rollback	F5
Save	F10
Search or Open Filter Query	F7

Select on a Called Page	Alt + S
Toggle Multi/ Single Records View	Ctrl + G
Up/Previous Record	Up Arrow
App Nav - Access Help	Ctrl + M
App Nav - Access Menu	Ctrl + Y
App Nav - Display Recently Opened Items	Ctrl + Shift + L
App Nav - Search	Ctrl + Shift + Y
App Nav - Sign Out	Ctrl + Shift + F

## Driving Even Deeper

Refer to *Ellucians Banner Getting Started Guide 9.x*