

Banner Navigation Reference Guide

North Orange County Community College District Information Services

Table of Contents

Introduction	3
Login Procedure	3
Banner Dashboard (Home Page)	4
Toggle Menu and Home	4
Search Bar	5
Applications Menu	5
Global Search Bar	6
Recently Opened Pages	6
Help Page	7
Keyboard Shortcuts (App Nav Icons Only)	7
Favorites	8
Banner Log Out	8
User Profile	9
Banner Page Tour	10
Search Section	10
Search Procedure	11
Related Pages	12
Tools	12
Sections	13
Expand/Collapse Section	13
Data Table Customization	14
Pagination Controls	14
Section Navigation Controls	15
Data Filters	15
Banner Page User Preferences	17
My Banner Personal Menu	18

V1.33

Introduction

Welcome to Banner! This guide will introduce you to the latest version of Banner in use at NOCCCD (version 9). This guide will cover basic navigation, Banner pages, key features/functions, and customization options. For the experienced Banner users, this guide will serve as a useful resource to review existing and new features.

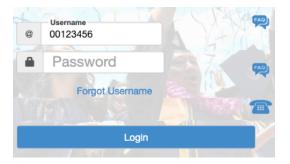
In this guide, the following topics are covered:

- Log in/out of Banner
- Banner Dashboard and Navigation
- Banner Pages
- Searches and Data Filters
- Customization Options

Please note that this Banner Navigation Guide is a living document and subject to modification at any time.

Login Procedure

1. Open your browser (recommend Chrome or Firefox) and go to the myGateway login page



- 2. Enter your 8-digit Banner ID number (ex: 00123456) in the myGateway Username field
- 3. Enter your password in the *Password* field and click the *Login* button at the bottom to continue
- 4. When the myGateway page appears, find and click on the *Employee Tools* link in the navigation menu

Tools View all	
🛠 Student Tools 🕨	Widgets
Distance Education	My Information
€ Registration ▶	wy momaton
COVID-19 >	
🛠 CC Tools 🕨	
🛠 🛛 FC Tools 🕨	
🛠 NOCE Tools 🕨	
🛠 Employee Tools 🔻	
Argos (Report)	
Ø Banner Admin	
Ø Banner Admin TEST	Employee Dashboard

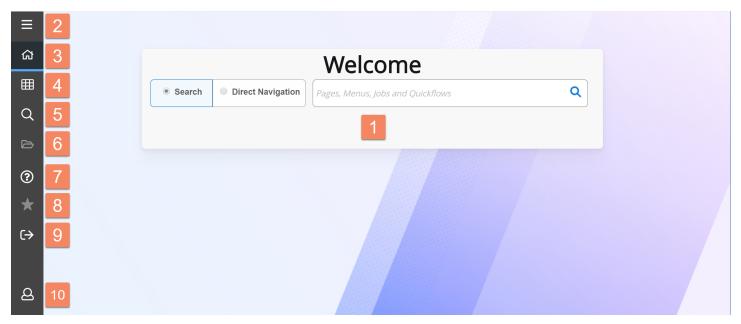
5. Click on the Banner Admin link in the choices that appear to enter Banner

Banner supports the latest versions of the following browsers: Chrome, Firefox, Microsoft Edge, Safari.

Note: You can also access Banner using this URL: https://banneradmin.nocccd.edu/applicationNavigator

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 button 2 to display the Dashboard Welcome page again.



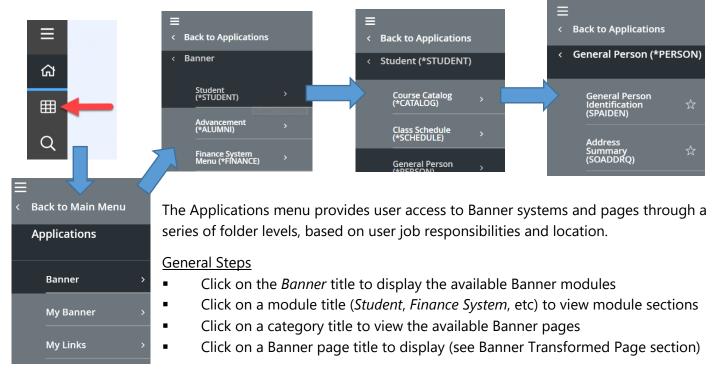
Search Bar

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.

Ξ			
చ		Welcome	
⊞	Search Direct Navigation	ident	\otimes
d J	1 2	Person Identification Form - Finance (FOAIDEN)	A
?		User Identification Control (GUAIDEN)	
*		System Identification (GUASYST)	
(→		Alternate Personal Identification Number (SPAAPIN)	•

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.

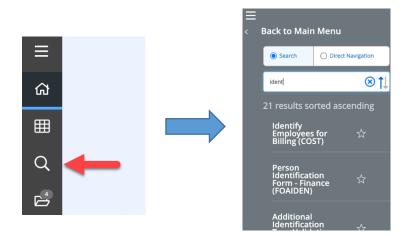


A Banner page can also be to the *Favorites* list by clicking the star icon next to the page name. See the *Favorites* section later in this guide for more information on this feature.

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.

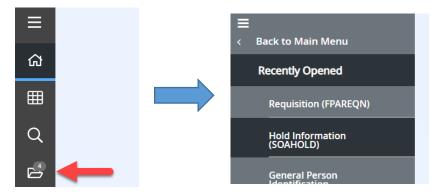
Global Search Bar

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. Up/Down arrows also provided to sort results in ascending or descending order.

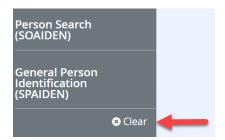


Recently Opened Pages

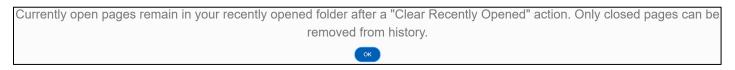
Click the folder icon in the global navigation menu to display a list of recently opened pages. Point and click on a page in the list to access. This icon appears after the first page is opened during the current session.



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 <u>previously closed</u> 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.



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.

ellucian. Banner Student Online Help	Help Page Help Application Navigator Keyboard Shortcuts
Contents Search 3	
Banner Student Online Help, August 2016	General Person Identification (SPAIDEN) page
Admissions Application/Checklist Summary (SAAACKL) page	Use the General Person Identification page to capture biographic/demographic information for all persons/non-persons associated with the institution.
(SAAAUCKL) page	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.
Admissions Decision and Rating Batch Entry (SAADCBT) page Admissions Decision (S 1 RV) 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 OnlineMatching Process Enabled (Indicator) on GUAINST. In addition, the user attempting to access GOAMTCH must not have been excluded from using it on GORCMUS. If user has been excluded from Common Matching on GORCh
Admissions Decision Runary ADCSN) page Electronic Application Process (SAAEAPS) page Electronic Admissions Procedure/Routine Control	To open GOAMTCH from SPAIDEN: enter GENERATED in the ID field, select the Generate ID button, or 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 SRRSRIN or SRIPREL, then the Origin field will be set to SRKPREL.
(SAAECRL) page - EDI Cross-Reference Term Code Rules (SAAECTM) page ⊞ Electronic Admissions Application Rules (SAAERUL) page	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 First Name 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.
Page	Too can very ure use us and ure page of process which created that name/us record in the to and name source section.
Admissions Mass Entry (SAAMAPP) page	Main window
Quick Entry Rules (SAAQKER) page Application Questions/Applications (SAAQUAN) page	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

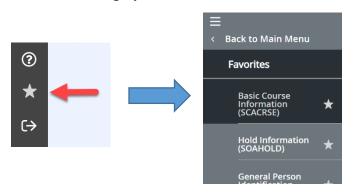
Keyboard Shortcuts (App Nav Icons Only)

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.

Application Navigator Keyboard Shortcuts	×
Display Applications	CTRL+M
Display Recently Opened	CTRL+Y
Display Dashboard	CTRL+SHIFT+X
Favorites	CTRL+D
Нер	CTRL+SHIFT+L
Search	CTRL+SHIFT+Y
Sign Out	CTRL+SHIFT+F

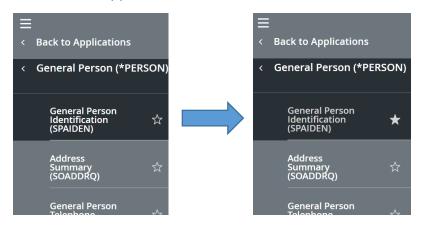
Favorites

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* or *Recently Opened* icon in the navigation menu
- 2. Using the menus, as needed, to 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



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 <u>only</u> 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. The myGateway login page will display once logout is complete. You can close your browser at this point.

Note: Logging out of Banner in any other manner may cause errors the next time you log back into the system.



User Profile

At the bottom of the navigation menu is the User Profile icon. Mouse over the icon or displaying (toggle) menu descriptions will display current user logged into Banner on that computer. Clicking on the icon will display a menu with two options. A number appearing on the icon indicates new messages waiting to be viewed.



Check Banner Messages will display messages directed to the current user (usually Finance related). If the User Profile icon shows a number (see below left), then that many messages are waiting to be viewed. Click the *Check Banner Messages* option from the menu to display.

	×	@ ellucian	General Message GUAMESG 9.3.3 (TEST)		
\star	GENER	RAL MESSAGE			
		Recipient	TRAIN02 Zero Zero Two Train	Reference ID	
C→		Sender	TRAIN01	Item	
		Date *	10/07/2019 Time	System *	S
		Message *	Welcome to Banner! Enjoy your stay.	Status	O Comple
		Source			Confide
		1 of 1 🕨 🔰	1 v Per Page		

My Preferences allows the current user to customize the appearance of your Banner display. The two options that will probably be the most useful for Banner users are *Display Options* and *My Links*.

×	Ø ellucian	General User P	Preferences Ma	aintenance GUAU	PRF 9.3.9	(TEST)		
Displa	y Options	Directory Options	My Links	Menu Settings	LDAP			
DISPI	LAY OPTIONS							
		Display Form	n Name on Title	Bar				✓ Display Release
		Display Form	n Name on Mer	าน				✓ Display Database
- ALER	RT OPTIONS							
		Dramat Dafa	ro Eviting Popp	or				Diaplay Duplicate

- Display Options is used to set a variety of display options and color scheme
- *My Links* is used to create and manage links to other Banner pages or an external address. Links will be stored in the My Links folder accessible from the Applications icon.

Use the Personal Settings option to preset certain features during Banner login and logout.

Personal Settings		
Do you need sign out confirmation?	\bigcirc Yes	No
Preferred initial page	Enter Page U	JRL/Acronym/Description
Search preference indicator	Search	O Direct Navigation
Sort by	Acronym	ODescription
		Cancel Save

Banner Page Tour

Below is the general appearance of a Banner page.

≡	X @ ellucian General Person Identification SPAIDEN 9.3.14 BAN9-32 (TEST)	🔒 ADD	RETRIEVE	🛔 RELATED	🔅 TOOLS
ធ					Go
	Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.				
Ħ					
Q					
?					
*					
(→	4				
යු					
1					
	5				
	6				
	EDIT Record 1/1 KEY BLOCK.ID [1] @2000 - 2019 Elucian.				ellucian.

Area	Description
1	Global Navigation Bar appearing on all pages.
2	Page Header Area
3	Search Section and "Get Started" hints. Type in the appropriate data in the search field(s) provided.
4	Sections Area. Displays additional data associated with the key block.
5	Section Navigation Controls
6	Additional information on the section or page currently displayed

Search Section

This section contains the following information:

×	@ ellucian	General Person Identification SPAIDEN 9.3.14 BAN9-32 (TEST)	🔒 ADD	🛃 RELATED	🔆 TOOLS
	ID:	··· +			Go

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

- X button Closes the current page
- Page Description, short name, Banner version, and database name
- Auto Hint Line Brief instructions on entering information in the search field(s)
- Go button –Click button to search and display record
- Add and Retrieve button Banner Workflow and Document Management buttons (not used at NOCCCD)
- Related button Shows other pages (if available) associated with data on the current page
- Tools button A list of standard actions and other options specific to the current page

Search Procedure

When a page is first accessed, the search section (also known as key block) will display. Provide the requested information for the search. If the search is successful, the requested information will display on the next screen.

The search section may contain something as simple as entering an ID number for a person, vendor, requisition, or transaction. In other instances, the search section may contain multiple parameter fields that require input before the requested information is located and displayed.

Parameter fields may also include a search (ellipsis) button that displays additional screens to aid in entering the correct information. Also note that parameter fields may be automatically populated based on what is set in other fields previously.

In the below example, let's start by entering the information in the entry field and clicking the *Go* button (or *Enter* key on the keyboard) on the right side to start the lookup process.

×	@ ellucian	General Person Identification SPAIDEN 9.3.14 BAN9-32 (TEST)	ADD	📇 RELATED	🌞 TOOLS
	ID:				Go
Get	Started: Comple	te the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.			

Click the *Go* button to confirm and display the associated information on the page. The requested information will appear. Note the search section is replaced at the top with brief information on the information retrieved. In this case, the student record requested.

× @ ellucian	General Person Identifica	ation SPAIDE	N 9.3.14 BAN9	-32 (TEST)					ADD		🛔 REL	ATED	🔅 TOOLS
D: @00650443 Fulle	rton, Fred										(Start C	Over
Current Identification	Alternate Identification	Address	Telephone	Biographical	E-mail	Emergency Contact	Additional Identification						
IDENTIFICATION										🗄 Insert	Delete	Copy	Y, Filter
ID	@00650443						Name Type						
PERSON										🚼 Insert	Delete	Па Сору	🔍 Filte
							Prefix						
Last Name	Fullerton						Suffix						
First Name	Fred)		Preferred First Name	Freddy					
Middle Name							Full Legal Name	Fred Fullerton					
NON-PERSON										🖬 Insert	🗖 Delete	🖷 Сору	👻 Filter
Name	-												

If the required information is unavailable, click the ellipses (3 dots) button to the right of an entry field (if available) to bring up a filter search or lookup table, both function in a similar manner.

🗙 🕜 ellucian P	erson Search SOAIDEN 9.3.12 (TEST)					B	ADD 🖺 RETRIEVE	🛃 RELATED 🛛 🔆 TOOL
PERSON SEARCH	PERSON SEARCH							
Active filters: Last No	ctive filters: Last Name : fullerton o Clear All							
ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
@01798989	Fullerton	Alex	Jean	07/14/1998				
BDB8627	Fullerton	Alex	Jean	07/14/1998	ID Change			CCCI
@01292149	Fullerton	Anna Kay	Alesia	02/23/1984				
@00532732	Fullerton	Brian	Allan	10/20/1982				
E70E100	Eulladan	Prion	Allen	10/20/1002	ID Change			

Note: Refer to the *Filter* section in the user guide for more assistance in using this feature.

Sorting options are also available. Click on any of the headers to enable ascending or descending sort on the data column. Once the desired information is found, double click on the corresponding data displayed in the leftmost column to import back into the entry field in the previous form.

A lookup table appears similar, but generally appears in a dialog box and does not have a filter option. Choose among the listed choices and double-click or click the *OK* button.

The example below requires setting multiple parameters in order for a search (or targeted search) is performed.

🗙 🕜 ellucian	Organization Budget Status FGIBDST 9.3.6 (TEST)			ADD 🔒	뤕 RELATED	🌞 TOOLS
Chart: '	1	Fiscal Year:	* 20			Go
Index:		Query Specific:	*			
		Account				
Include Revenue:	✓	Commit Type:	Both			
Accounts						
Organization:		Fund:				
Program:		Account:				
Account Type:		Activity:				
Location:						
Get Started: Complet	e the fields above and click Go. To search by name, press	s TAB from an ID field, enter your search criteria, and then n				

In some cases, setting one parameter may result in others being automatically set as well. Once all necessary parameters are set, click the *Go* button to search for the record and display.

Related Pages

Related pages are those that are associated with the page currently being viewed. The pages are often those that are part of a process workflow. For example, a process workflow that involves entering data on three different Banner pages involves: enter/save data on the first page, open *Related*, find and click on the next page in the process, enter/save data, and repeat.

A 🔒	DD		뤕 RELATED	🔆 TOOLS
Ac	Q	Search		
	В	udget Summary	Information [F(GIBSUM] Shift+F2
	0	rganization Enc	umbrances [FG	F4
	Tr	ansaction Detai	il Information [F	GITRND] F3

Tools

Click the *Tools* button to display the search bar, export, print, or other available actions and options listed.

a A	dd 🖺 Retrieve	RELATED	🋠 TOOLS
Ac	Q Search		^
	ACTIONS		
_	Refresh		F5
	Export		Shift+F1
	Print Screenshot	C	trl+Alt+P
	Clear Record		Shift+F4
	Clear Data		Shift+F5

Sections

Each Banner page will contain the requested information organized into sections and section headers. Controls are available to access pages containing multiple records and tabs for multiple sections.

Below is an example of an active section header with descriptions. Section headers appear below the key block. Areas 3, 4, and 5 are applicable only in sections that allow data entry.

🗙 🔘 ellu	🗙 🎯 ellucian Detail Encumbrance Activity FGIENCD 9.3.4 (TEST) 💦 ADD 🖺 RETRIEVE 🗸 RELATE								
_ 1 _									
Area	Description								
1	Carat icon that expands or collapses a section of information								
2	Description of records contained in this section of information								
3	Insert a new record below a selected existing record in this section								
4	4 Delete an existing record below a selected existing record in this section								
5	Copy a record and insert below the original record in this section								
6	Filter records in this section. Important: Save any changes before usin	ng this	function.						

Only one section header can be active at any time, with all other headers grayed out. To make another section header active, simply click on a data field in that section to activate.

<u>Note</u>: Depending on the Banner page accessed, additional options may be available in the section header. Consult the corresponding help page for more information.

Expand/Collapse Section

Sections can be expanded/collapsed by clicking on the carat symbol located at the bottom left of a section header.

		ENCUMBRANCE	INFOR	MATION
Encumbrance:	Encumbrance Period: All	Descri	ption	
ENCUMBRANCE INFOR	RMATION	s	tatus	С
Description	The second se		Туре	Ρ
Status	С	ENCUMBRANCE	DETAI	L
Туре	P		Item	1 BP48V27-2US External 4
Туре	·	Sequ	ence	1
ENCUMBRANCE DETAI	IL	Fiscal	Year	18
TRANSACTION ACTIVITY	ТҮ	s	tatus	C
		Commit Indi	cator	U

Data Table Customization

When working with data tables, several features are available to customize the look.

Resize Columns

Data columns can be resized in a table. Point the cursor in between two columns and drag to adjust the width.

Last Name	Middle Name ∻	Bir	Last	Name	Middle Name	Bir
Jones	Ann	06	Jone	S	Ann	06
Jones	Ann	06	Jone	S	Ann	06
Jones	Z	05	Jone	s	Z	05
Jones		05	Jone	s		05
Jones		05	Jone	s		05
Jones		05	Jone	s		05
Jones		05	Jone	S		05
Jones	Lynn	01	Jone	s	Lynn	01
lance	Lunn	01	long		Lunn	01

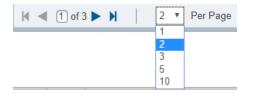
Reorder Columns

Data columns can be rearranged (reordered) in a data table. Simply drag a column header to the desired location. A preview will be shown as the drag is done to show the order if set.

ID	Last Name	First Name	ID	First Name	Las
@01268686	Jones	Nadja	@01268686	Nadja	Jone
S687610	Jones	Nadja	S687610	Nadja	Jone
@01555724	Jones	Nadjah	@01555724	Nadjah	Jone
@00353806	Jones	Naima	@00353806	Naima	Jone
C379636	Jones	Naima	C379636	Naima	Jone
-614500	Jones	Naima	F614500	Naima	Jone
S937284	Jones	Naima	S937284	Naima	Jone
@00032852	Jones	Nakiesha	@00032852	Nakiesha	Jone
EE60E17	lanaa	Nakiasha	FEROE 47	Nationa	lana

Pagination Controls

Pagination controls are also available to adjust the number of records to display per page beneath the section header. Navigation controls are also provided to view each page of records. The pagination controls appear at the bottom of the displayed section.



<u>Note</u>: Customizations applied to data tables can be preserved for future sessions. See the *Banner Page User Preferences* section appearing later in the reference guide.

Section Navigation Controls

Controls are available to navigate sections, perform other functions, and display additional information.

	1 2 3 CANCEL SELECT coord: 1/254271 FGBENCH.FGBENCH_NUM [1] 4 02000 - 2018 Ellucian. All rights reserved. ellucian.					
Area	Description					
1	View previous (up arrow) and next (down arrow) sections of the page					
2	If applicable, details on latest activity and user who created/modified the displayed information					
3	Cancel/Select/Save buttons pertaining to a selection list (depicted above) or displayed record					
4	Associated record and table information appears at the bottom of this area					

Data Filters

If available, a filter feature is available to conduct a search or show a subset of displayed data in a page section.

1. Click the *Filter* button on the far right of a page section displaying a set of data.

×	@ ellucian	Encumbrance	e List FGIENCB 9.3 (T	'EST)					🔒 ADD		昌 RELATED	🗱 TOOLS
* EI	CUMBRANCE LIST									🔛 Insert	Delete	🖹 🔍 Filter
Enc	umbrance Number		Туре	Description	Current Balance	FY	In Progress	Status	Establish	Date	Last Activity Date	
000	0609		R	Patricia A Carnes	0.00	02		С	07/30/20	01	07/30/2001	
001	5322		R	Maureen E King	0.00	03		С	11/20/20	02	11/20/2002	
004	2793		R	David S Okawa	0.00	06		С	02/09/20	06	02/09/2006	

2. The filter feature appears with a set of default data fields and other options.

× @ ellucian Encumbran	ce List FGIENCB 9.3 ((TEST)					📑 ADD) 🖹 Retrieve ;	RELATED	🗱 TOOLS 1
ENCUMBRANCE LIST							📀 Ent	er a query; press F8 to e	execute.	
Basic Filter Advanced Filter				2						8
Encumbrance Number	С Туре	•	Description	O FY		Status	•	Add Another Field	🔻	4
									C	lear All Go
Encumbrance Number	Туре	Description		Current Balance	FY I	In Progress	Status	Establish Date	Last Activity	Date

Area	Description
1	Switch between Basic and Advanced Filters. Default is set to Basic Filter.
2	Current data fields active for the filter
3	Add another data field to the filter
4	Buttons to clear all data fields from the filter and to execute the filter on the data entered

Basic Filter

The basic filter will search on the exact information you provide in the active data fields.

Basic Filter Advanced Filter					
Encumbrance Number	Type •	Description • Provantage	FY O	Status C	•

In the above example, this search displays records that satisfy all of the search conditions. For searches that have complex conditions, use the Advanced Filter. Note: The wild card (%) is supported in searches.

Advanced Filter

Clicking the Advanced Filter option will display the active data fields, along with a selectable logic operator and a field to enter a value to filter. Be sure to enter a value type consistent with the data field for accurate results.

Basic Filter Advanc	ilter 🔶	
Encumbrance Num	Equals	
Туре	Equals Contains	
Description	Like Starts With	
FY	Ends With Equals Not Equal	

3. To remove a data field from the filter, click the minus icon at the top right of the data field box (Basic) or the far right of the data field row (Advanced)

Encumbrance Number	Encumbrance Number Equals	0
Basic Filter	Advanced Filter	

Basic Filter

4. To add a data field, click the Add Another Field drop-down box and select the desired data field.

Add Another Field 🔻
Add Another Field
Establish Date
Last Activity Date

- 5. Repeat Step 3 and 4 to set up or remove data fields to the filter, as needed.
- 6. Click the Go button at the bottom right of the filter box to activate the filter and view results. To clear all filters and start over, click the Clear All button.

To conduct a search from the key Block, click on the available ellipses button to the right of a key field.

×	@ ellucian	Detail Encumbrance Activity FGIENCD 9.3.4 (TEST)	ADD 🔒	RELATED	🔅 TOOLS
	Encumbrance: *	Encumbrance: All	v		Go
		Period			
• •					

ete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTEF

When the data list displays, click the Filter button at the top right and follow the directions above to set up the basic or advanced search filter. In some cases, the filter will automatically display.

×	@ ellucian	Encumbranc	e List FGIENCB 9.3 (1	rest)				l.	🔒 ADD 🛛 🖺 RETRIEVE	뤏 RELATED 🗧	🗱 TOOLS
▼ EN	CUMBRANCE LIST								🖬 Insert	Delete	👻 Filter
Encu	Imbrance Number		Туре	Description	Current Balance	FY	In Progress	Status	Establish Date	Last Activity Date	
000	0609		R	Patricia A Carnes	0.00	02		С	07/30/2001	07/30/2001	
001	5322		R	Maureen E King	0.00	03		С	11/20/2002	11/20/2002	
004	2793		R	David S Okawa	0.00	06		С	02/09/2006	02/09/2006	

Note: Searches can also be preserved for future sessions, see next section for more information.

Banner Page User Preferences

Many Banner pages allow the user to save certain settings and preferences that persists over many sessions. The settings and preferences can be set, adjusted, or restored at any time.

Examples of settings and preferences that can be saved:

- Adjust columns (resize, reorder)
- Customized data filters and searches
- Section Pagination

To save or restore settings and preferences on a page, click the *Settings* button (if available) located on the right side of the section header.

× @ ellucian Encumb	prance List FGIENCB 9.3 ((PPRD)					E	add 🖹 retrieve 🛓	RELATED
ENCUMBRANCE LIST							\rightarrow	🏟 Settings 🛛 🖬 Insert 🗖 D	elete 🍢 C
Encumbrance Number	Туре	Description	Current Balance	FY	In Progress	Status	Establis	Save Column Settings	vity Date
R015343	R	Irene Lim	0.0	20		С	08/12/2	Save Pagination Settings	019
0000609	R	Patricia A Carnes	0.0	02		С	07/30/2	Save Filter Settings	001
0015322	R	Maureen E King	0.0	03		С	11/20/2	Save All	002
0042793	R	David S Okawa	0.0	06		С	02/09/2	Restore Column Settings	006
0048932	R	Chrystal Van Beynen	0.0	07		С	09/08/2	5	006
0097366	R	Bonnie K Fast	0.0	13		С	12/14/2	Restore Pagination Settings	012
20035186	R	Sherrill L Spencer	0.0	05		С	03/14/2	Restore Filter Settings	005
207867	R	Dawnmarie Neate	0.0	07		С	03/20/2	Restore All	007
35366	R	Sandra L Palmer	0.0	05		С	03/30/2	005 03/30/	2005
PADEON	D	1		40		0	00/04/0	00/04	0044

Save Column Settings will preserve column width and ordering, but not sorts.

Save Pagination Settings will preserve settings on the pagination bar at the bottom of the data table

Save Filter Settings will preserve filter actions. Note that this setting is only enabled after a filter is set.

🗙 🕜 ellucian	Encumbrance List	FGIENCB 9.3 (PPRD)						E	add 💄 retrieve 🛔 f	R
* ENCUMBRANCE LIST									Settings Insert Delet	te
Active filters: Last	Activity Date: (Gre	ater Than) 04/01/2019 (Clear All						Save Column Settings	
Encumbrance Number	•	Туре	Description	Current Balance	FY	In Progress	Status	E	Save Pagination Settings Save Filter Settings	ţ
R015343		R	Irene Lim	0.00	20		С	(Save All	11
P0094289		Р	Westberg - White Inc	0.00	19		С	(Restore Column Settings	1
P0105259		Р	American Reprographics Co LLC	0.00	17		С	(Restore Pagination Settings	1
P0105426		Р	Westberg - White Inc	0.00	19		С	()	1
P0105429		Р	Westberg - White Inc	0.00	19		С	(Restore Filter Settings	1
P0106196		Ρ	Westberg - White Inc	0.00	19		С		Restore All	1

Save All will save all column and pagination settings

Restore Column/Pagination/All will restore the respective default settings

My Banner Personal Menu

The Global Navigation Menu can be customized by adding a personal menu entry (called My Banner) that contains links to pages, jobs, and menus that are accessed regularly by the user.

To create the personal menu, follow the steps listed below:

1. Type GUAPMNU into either the search field on the main Banner page or the search bar that appears next to the main menu button on the top bar. Click on the GUAPMNU entry that appears in the results list.

≡ ຜ			
₩ ₩		Welcome	
Q	Search Direct Navigation		\otimes
		Personal Menu Maintenance (GUAPMNU)	
0			

2. Click the *Go* button on the next screen that appears. Leave the username displayed in the *Personal Menu* field unchanged. The username is primarily for ARGOS and other internal Banner operations.

×	@ ellucian	Personal Menu Maintenance GUAPMNU 9.3.14 (TEST)	🔒 ADD	뤏 RELATED	🔆 TOOLS
	Personal Menu:	TRAIN01			Go
G	et Started: Comple	te the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.			

3. The GUAPMNU page appears with a list of available objects that can be added to your personal menu.

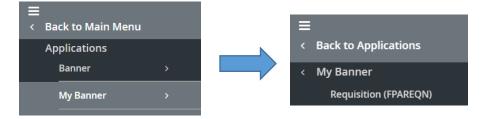
onal Menu: TRAIN01					Query caused no record	s to be retrieved	. Re-enter.	
NU MAINTENANCE						ert 🗖 Delete	Сору	Ÿ.
Type * Oracle Forms	module v							
Object Type			Object Selection	1				
Object *	Description *		Object	Description				
STVSOFF	A/F/I Fund Source Validation	A						
STVGSTA	A/F/I Status Validation							
STVTASK	A/F/I Task Validation							
STVGTYP	A/F/I Type Validation							
SSAQCRL	Academic Calendar Rule Query							
STVACCL	Academic Calendar Type Validation							
STVSIZE	Academic Dress Size Validation	2						
STVTYPE	Academic Dress Type Validation							
SHQSUBJ	Academic History Catalog Query	Insert Selection						
STVEVEN	Academic History Event Code Validation	Remove Selection			2			
SHQSECT	Academic History Section Query	Insert All			3			
SHANCRS	Academic Non-Course	Remove All						
STVASTD	Academic Standing Code Validation							
SHAACST	Academic Standing Rules							
SHQASTR	Academic Standing Rules Query							
STVACYR	Academic Year Validation							
STVTAAU	Acceptance Authority Code Validation							
STVACPR	Acceptance Practice Code Validation							
STVTRAC	Acceptance Reason Validation							

Area	Description					
Object Type list will display objects that can be added to the personal menu						
2 Selection controls to add/remove objects to the personal menu						
3	Object Selection list displaying objects that will appear in the personal menu					

- 4. Type in the short name of the page in the available text box in the Object Selection section (right side)
- 5. Press Enter on your keyboard. The full name of the page will appear in the Description column

		🖬 Insert	Delete	🖪 Сору	Ϋ, Filter
Object Selection					
Object Selection Object	Description				

- 6. Click the *Insert* button in the *Menu Maintenance* bar (see above)
- 7. Repeat the above steps to add additional pages
- 8. When finished, click the Save button (or press F10) at the bottom right corner of the page
- 9. Log out and back into Banner. Click the *Applications* button in the global navigation menu.
- 10. The My Banner section will appear. Click to display and access your saved pages.



For those pages where a search is necessary to add, use the *Object Type* section on the left.

- 1. Use the drop-down menu to select the object type above the columns
- 2. Scroll through the list of pages that appear in the *Object Type* list
- 3. To select a page to save, double-click on the short name (description will display in a blue color) and click the *Insert Selection* button. The selected page will appear in the Object Selection section.

	u Maintenance GUAPMNU 9.3.14 (TEST)						-	_		룗 RELATED	- T.
onal Menu: TRAIN01										St	art Ove
U MAINTENANCE								🖬 Insert	🗖 Del	ete 📲 Copy	Ŷ, I
Type * Oracle Forms	module 🔍										
Object Turn		_] [_	Diject Selection						
Object Type Object *	Description *				Object Selection	Description					
STVSOFF	A/F/I Fund Source Validation				FPAREQN	Requisition					
STVGSTA	A/F/I Status Validation			1	STVSIZE	Academic Dress Size Validation					_
STVTASK	A/F/I Task Validation										
STVGTYP	A/F/I Type Validation	L		3							
SSAQCRL	Academic Calendar Rule Query	P,		٢.							
STVACCL	Academic Calendar Type Validation	1	N								
STVSIZE	Academic Dress Size Validation		1944 - Maria Maria								
STVTYPE	Academic Dress Type Validation										
SHQSUBJ	Academic History Catalog Query		Insert Selection								
STVEVEN	Academic History Event Code Validation		Remove Selection								
SHQSECT	Academic History Section Query		Insert All								
SHANCRS	Academic Non-Course		Remove All								
ΩΤ72Δ//Τ2	Academic Standing Code Validation										

- 4. To remove a page, double-click on the page name in the *Object Selection* section (description will display in a blue color) and click the *Remove Selection* button.
- 5. Repeat Steps 1 through 4 to add additional pages
- 6. Click the Save button at the bottom of the page. The changes take effect on next login.

<u>Note</u>: If an inaccessible object is added to the *Object Selection* list, select that object and click *Tools* | *Clear Record* to remove. The error message will prevent the removal of the inaccessible object normally.

The following table lists the keyboard shortcuts that you can use to navigate through Banner versions 8 and 9. Actions with new or updated keyboard combinations in Banner 9 are indicated by bold entries.

Action	Banner 8	Banner 9		
Application Navigator				
Access Help	Banner 9 keyboard			
Access Menu	shortcuts will work in Banner 8 if you are	CTRL+Y		
Display recently opened items	running Banner 8 with Application Navigator	CTRL+SHIFT+L		
Search	and have applied the	CTRL+SHIFT+Y		
Sign out	keyboard shortcut configuration settings.	CTRL+SHIFT+F		
Banner Document Management (BDM)		1		
Add BDM Documents	Icon or Menu	ALT+A		
Retrieve BDM Documents	Icon or Menu	ALT+R		
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q	CTRL+Q		
Change MEP Context	Not applicable	ALT+SHIFT+C		
Choose/Submit	ENTER	ENTER		
Clear All in Section	SHIFT+F5	SHIFT+F5		
Clear One Record	SHIFT+F4	SHIFT+F4		
Clear Page or Start Over	SHIFT+F7	F5		
Count Query	SHIFT+F2	SHIFT+F2		
Delete Record	SHIFT+F6	SHIFT+F6		
Down/Next Record	Down Arrow	Down Arrow		
Duplicate Item	F3	F3		
Duplicate Selected Record	F4	F4		
Edit	CTRL+E	CTRL+E		
Execute Filter Query	F8	F8		
Exit	CTRL+Q	CTRL+Q		
Expand/Collapse Drop-down Field	Click field	ALT+Down Arrow		
Export	Extract Data with Key or Extract Data no Key	SHIFT+F1		
First Page	Not applicable	CTRL+Home		

Action	Banner 8	Banner 9		
Insert/Create Record	F6	F6		
Last Page	Not applicable	CTRL+End		
List of Values	F9	F9		
More Information	ALT+H	CTRL+SHIFT+U		
Next Field or Item	Tab	Tab		
Next Page Down	Page Down	Page Down		
Next Section	CTRL+Page Down	ALT+Page Down		
Open Menu Directly	F5	CTRL+M		
Open Related Menu	Not applicable	ALT+SHIFT+R		
Open Tools Menu	Not applicable	ALT+SHIFT+T		
Page Tab 1 Page Tab 2 and so on	Not applicable	CTRL+SHIFT+1 CTRL+SHIFT+2 and so on		
Previous Field or Item	SHIFT Tab	SHIFT Tab		
Previous Page Up	Page Up	Page Up		
Previous Section	CTRL+Page Up	ALT+Page Up		
Print	SHIFT+F8	CTRL+P		
Refresh or Rollback	SHIFT+F7	F5		
Save	F10	F10		
Search or Open Filter Query	F7	F7		
Select on a Called Page	CHIFT+F3	ALT+S		
Toggle Multi/Single Records View	Not applicable	CTRL+G		
Up/Previous record	Up Arrow	Up Arrow		
Workflow				
Release Workflow	Icon or Menu	ALT+Q		
Submit Workflow	Icon or Menu	ALT+W		