Banner Navigation

Reference Guide

North Orange County Community College District

Information Services

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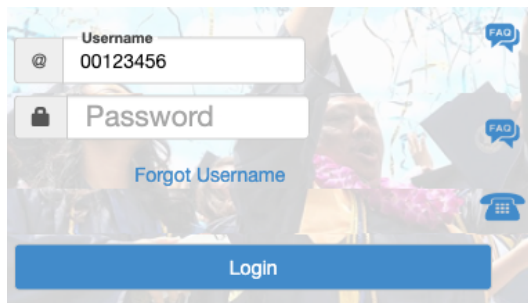
2. Enter your 8-digit Banner ID number (ex: 00123456) in the myGateway *Username* field
3. Enter your password in the *Password* field and click the *Login* button at the bottom to continue
4. When the myGateway page appears, find and click on the *Employee Tools* link in the navigation menu
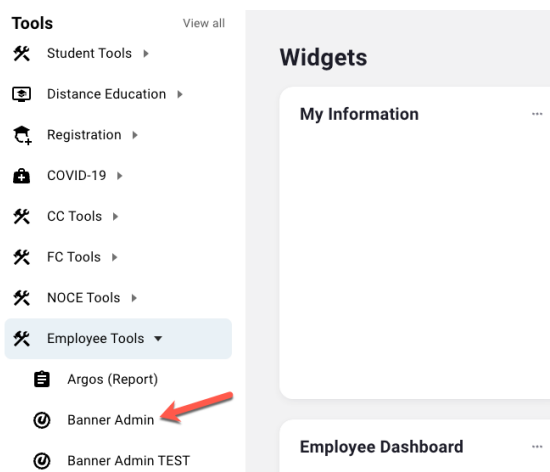

5. Click on the *Banner Admin* link in the choices that appear to enter Banner

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.
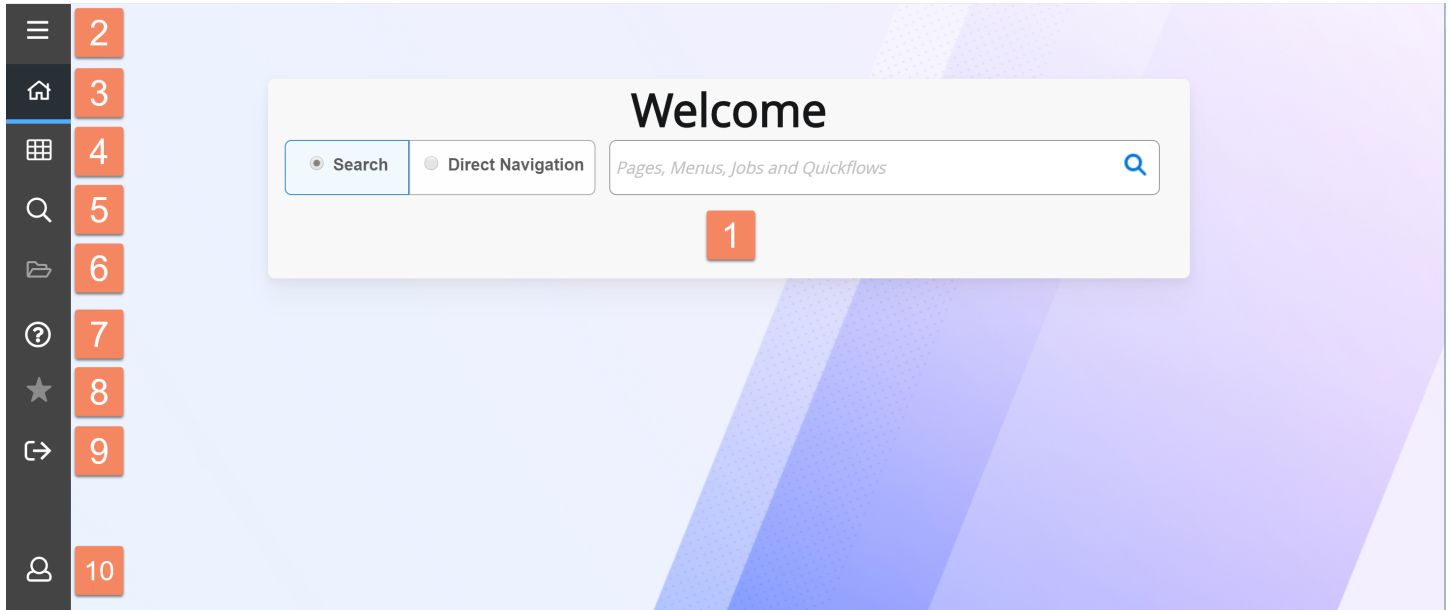
| Area	Description
1	Main search bar. Displays suggestions as you search or directly navigate to a specific Banner page
2	Toggle main menu descriptions
3	Return to Banner Dashboard (the Welcome screen shown above)
4	Displays *Applications*, *My Banner*, and *My Links* menu
5	Global search or directly 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.
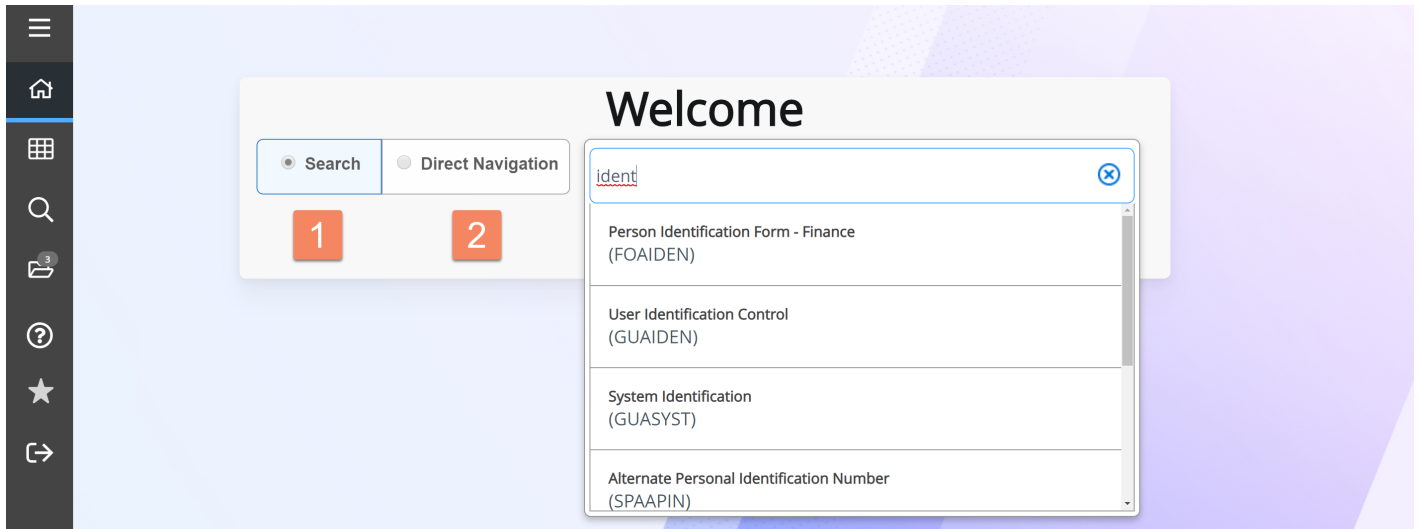
Applications Menu

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.
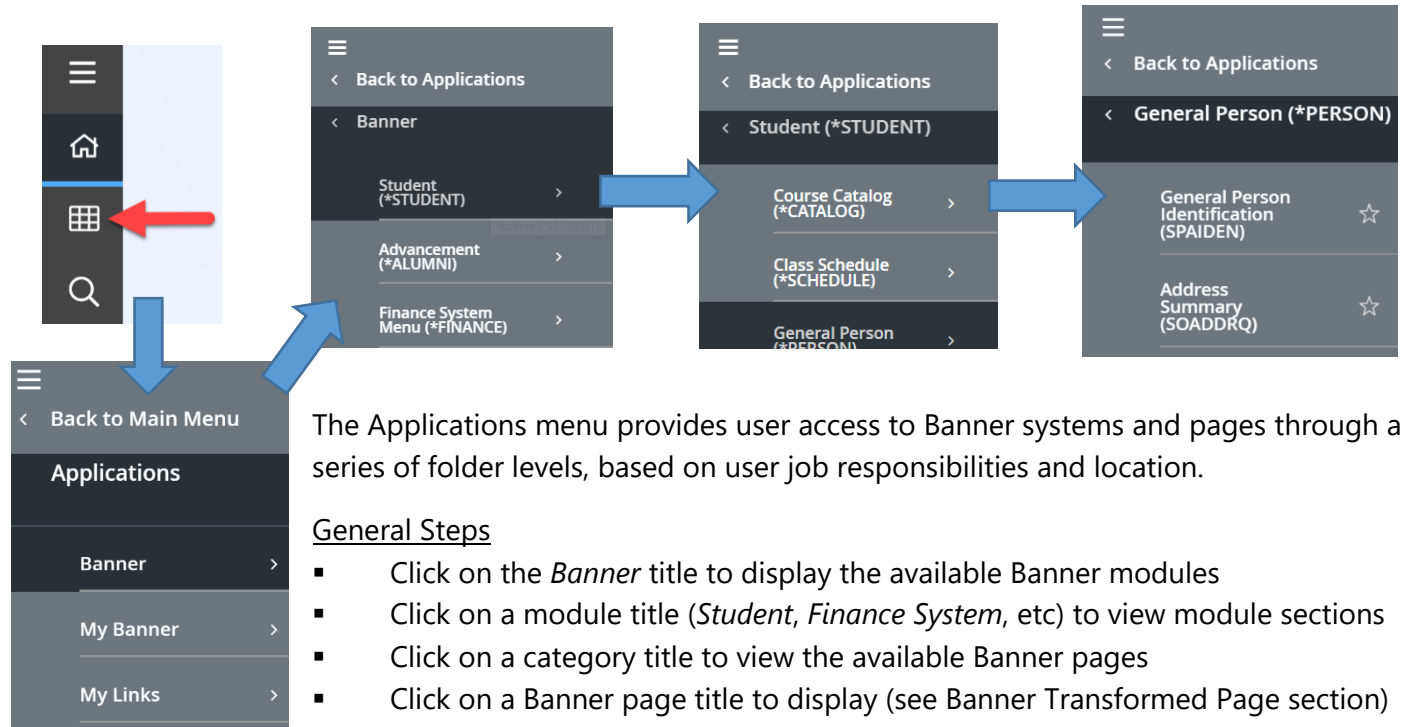
The Applications menu provides user access to Banner systems and pages through a series of folder levels, based on user job responsibilities and location.

General Steps

- ▪ Click on the *Banner* title to display the available Banner modules
- ▪ Click on a module title (*Student*, *Finance System*, etc) to view module sections
- ▪ Click on a category title to view the available Banner pages
- ▪ Click on a Banner page title to display (see Banner Transformed Page section)

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.
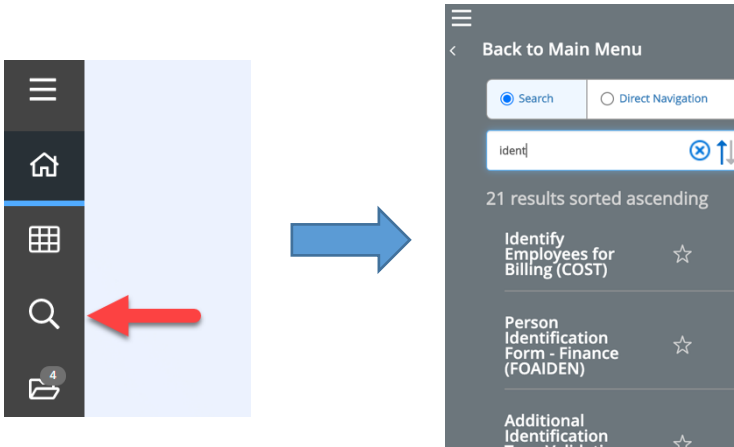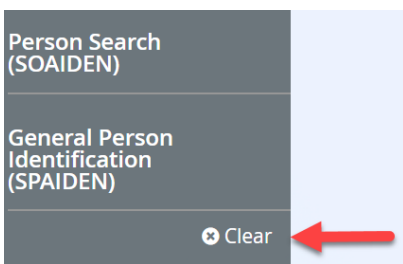
Recently Opened Pages

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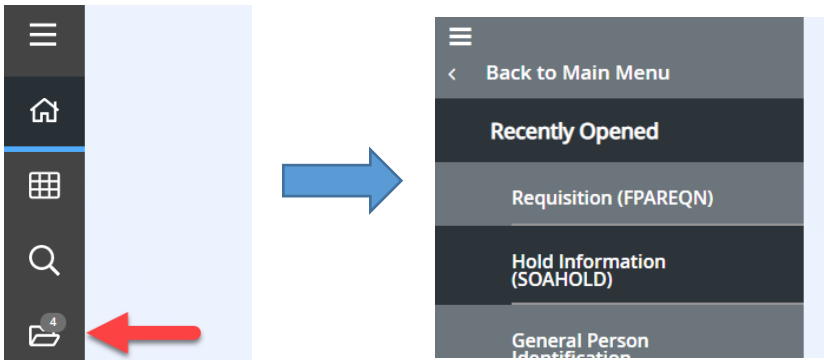
At the bottom of the listing, there is an option to manage open pages by clearing those not needed anymore.

The Clear link will remove any 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.
>
> OK

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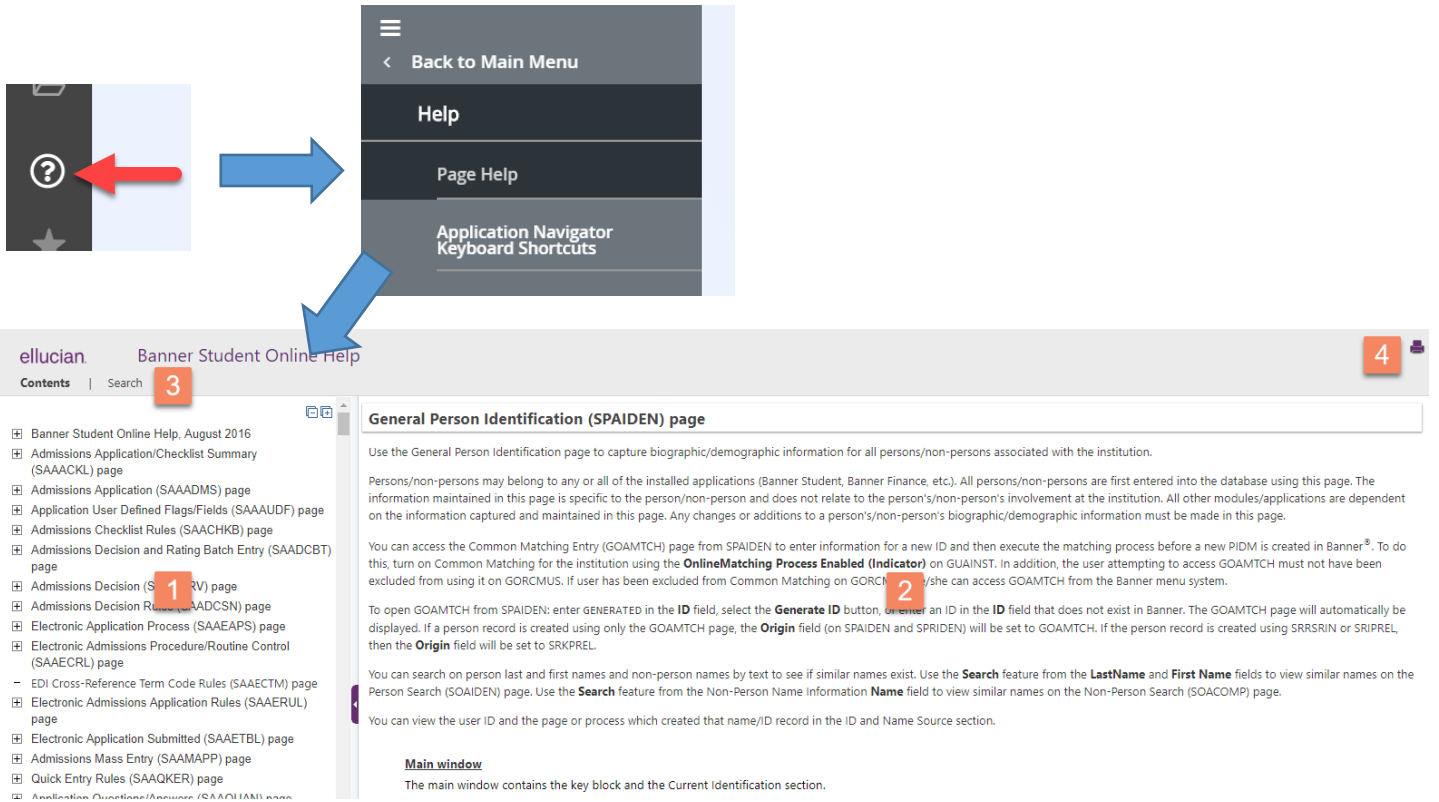
| Area	Description
1	Navigation area displaying all available Banner pages with help information
2	Content area displaying help information for the selected Banner page
3	Global search bar. Available on all screens
4	Print help information for the selected Banner page

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
Help	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.
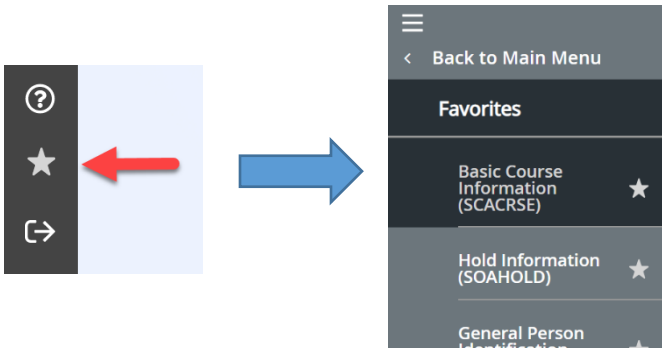
Follow these steps to favorite a Banner page:

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
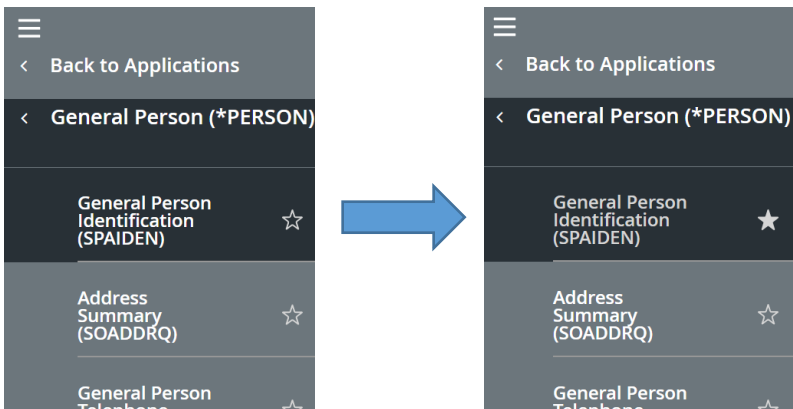

Note: If the star icon is already white, no further action is necessary. The page is already in *Favorites*.

The keyboard shortcut for *Favorites* is CTRL+D. The shortcut is 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. 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.
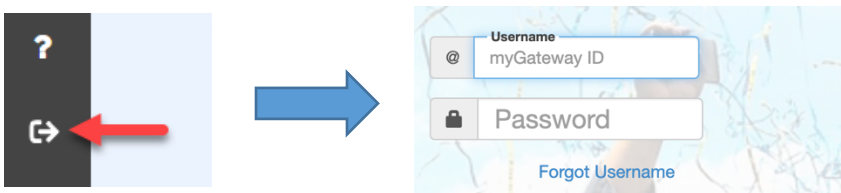
User Profile

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.
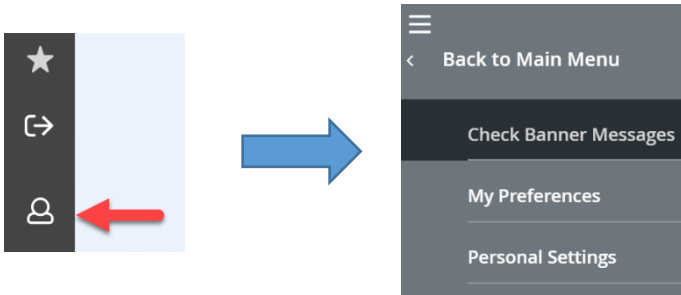
Check Banner Messages will display messages directed to the current user (usually Finance related). If the User Profile icon shows a number (see below left), then that many messages are waiting to be viewed. Click the *Check Banner Messages* option from the menu to display.
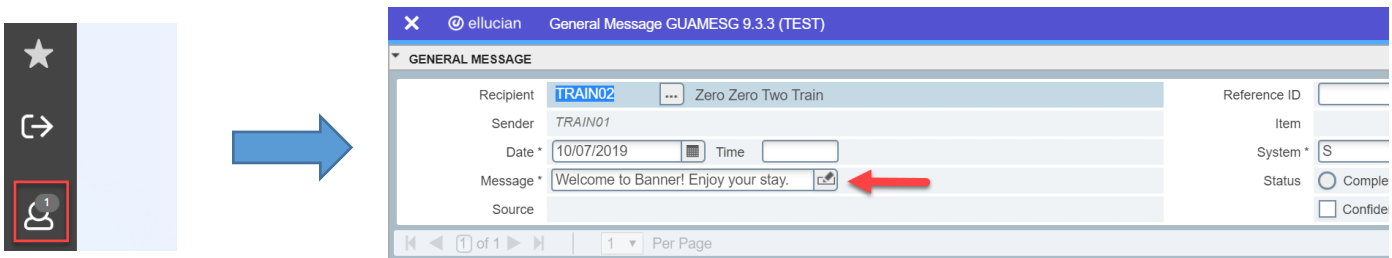
My Preferences allows the current user to customize the appearance of your Banner display. The two options that will probably be the most useful for Banner users are *Display Options* and *My Links*.
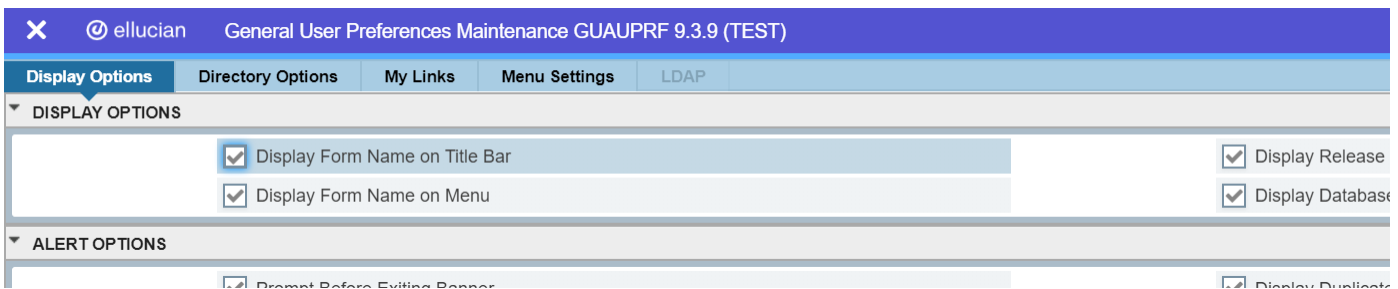
- *Display Options* is used to set a variety of display options and color scheme
- *My Links* is used to create and manage links to other Banner pages or an external address. Links will be stored in the My Links folder accessible from the Applications icon.

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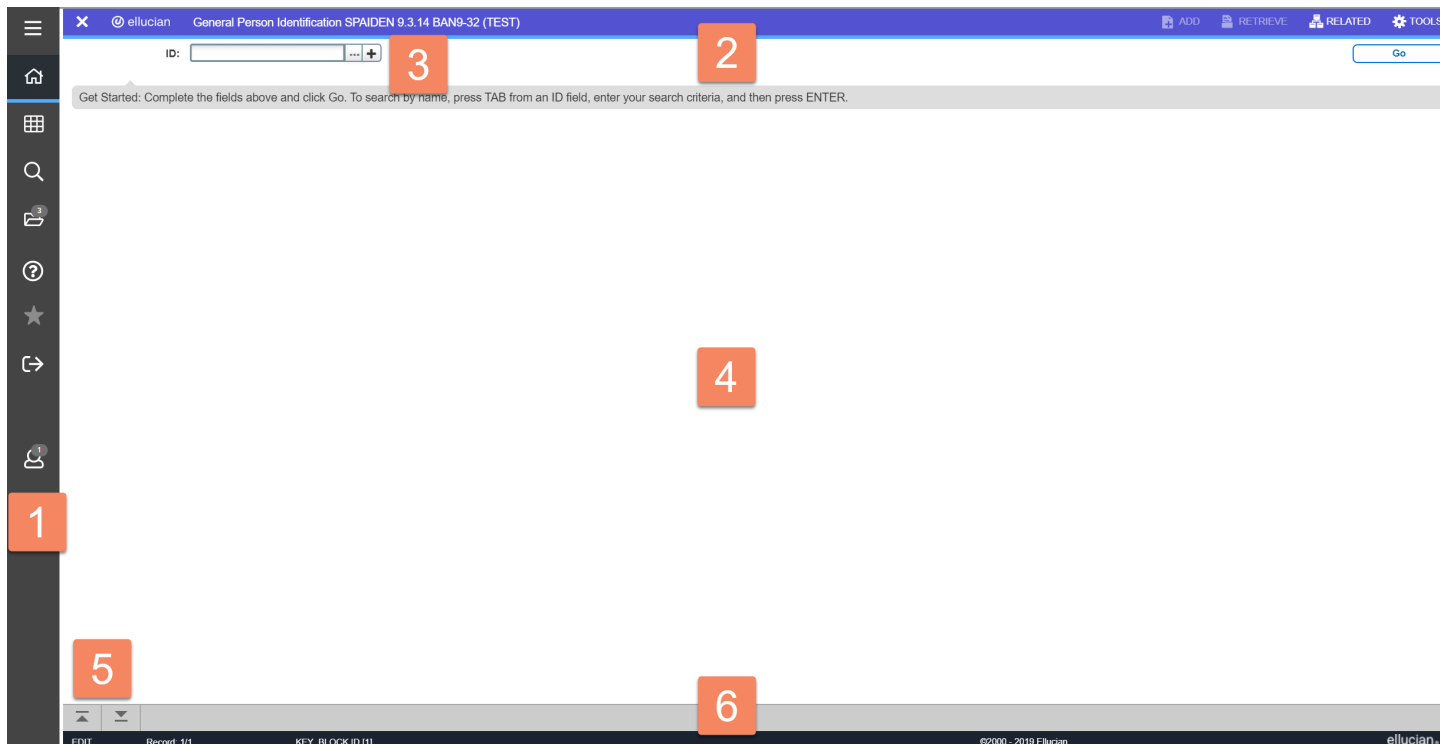
Banner Page Tour

Below is the general appearance of a Banner page.

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:
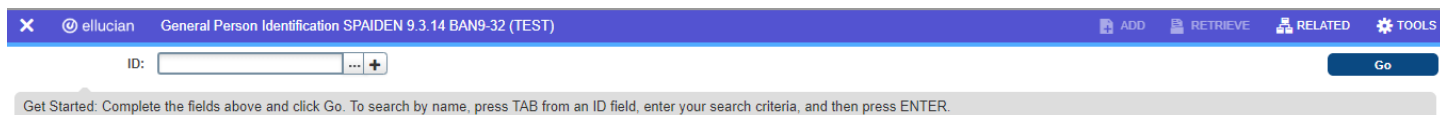
- X button – Closes the current page
- Page Description, short name, Banner version, and database name
- Auto Hint Line – Brief instructions on entering information in the search field(s)
- *Go* button –Click button to search and display record
- *Add* and *Retrieve* button - Banner Workflow and Document 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
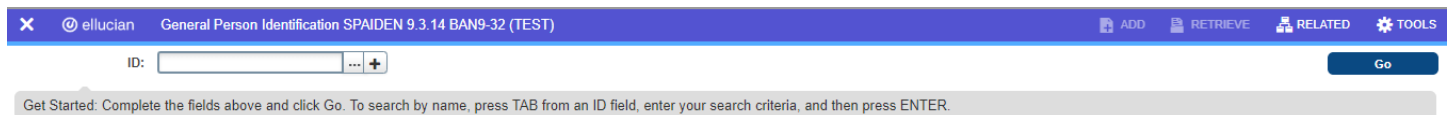
Search Procedure

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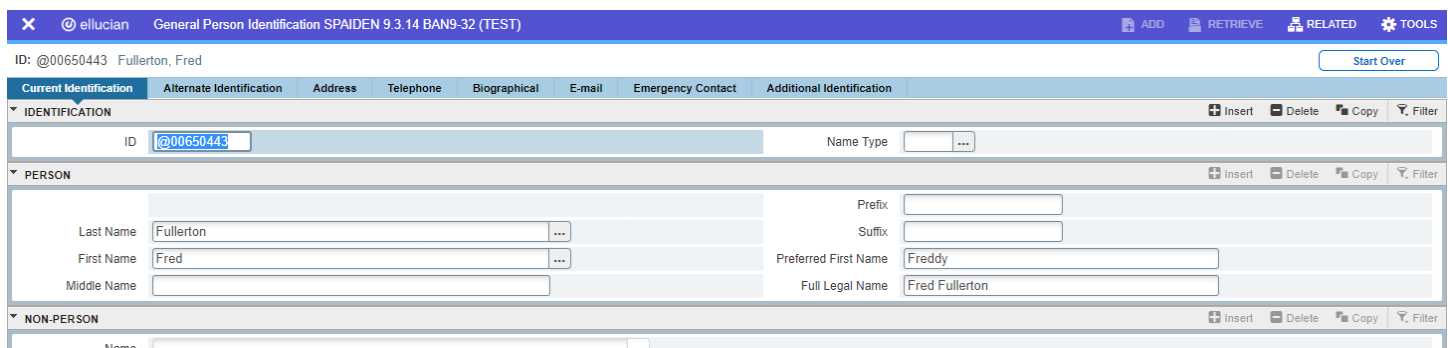
Parameter fields may also include a search (ellipsis) button that displays additional screens to aid in entering the correct information. Also note that parameter fields may be automatically populated based on what is set in other fields previously.

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.
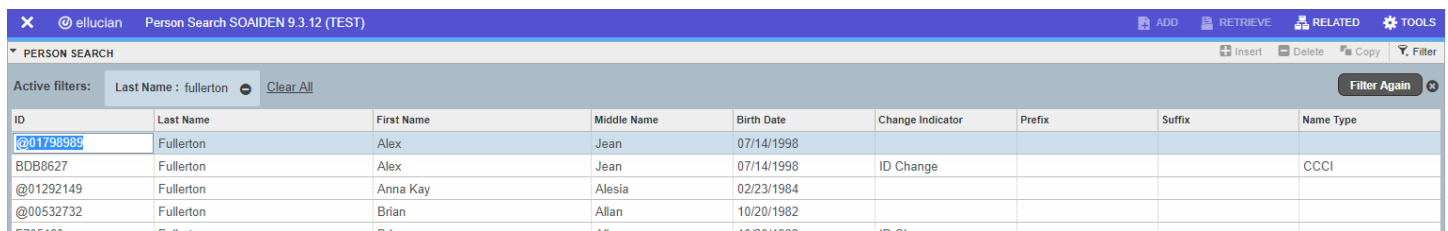

Click the *Go* button to confirm and display the associated information on the page. The requested information will appear. Note the search section is replaced at the top with brief information on the information retrieved. In this case, the student record requested.

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.

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.

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.
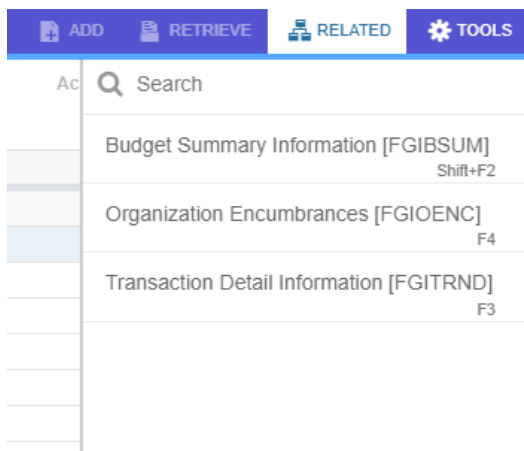
Tools

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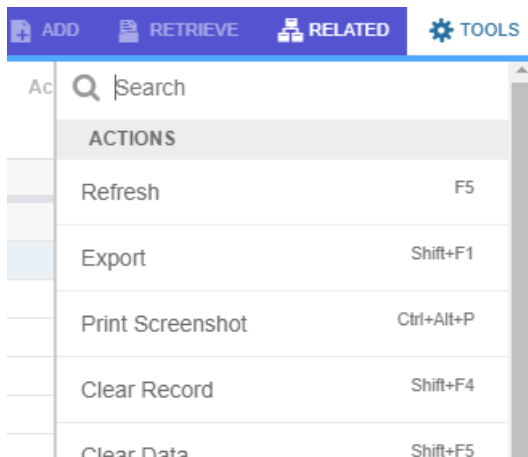
Sections

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.

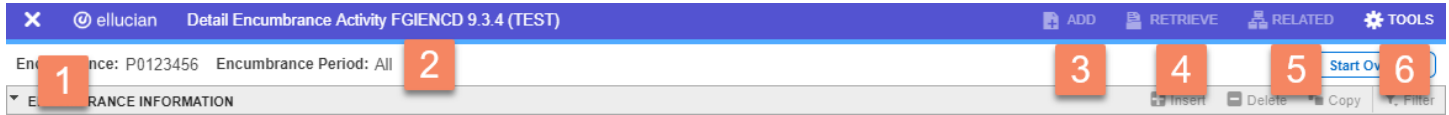Below is an example of an active section header with descriptions. Section headers appear below the key block. Areas **3**, **4**, and **5** are applicable only in sections that allow data entry.


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	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 using 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.

Note: 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.
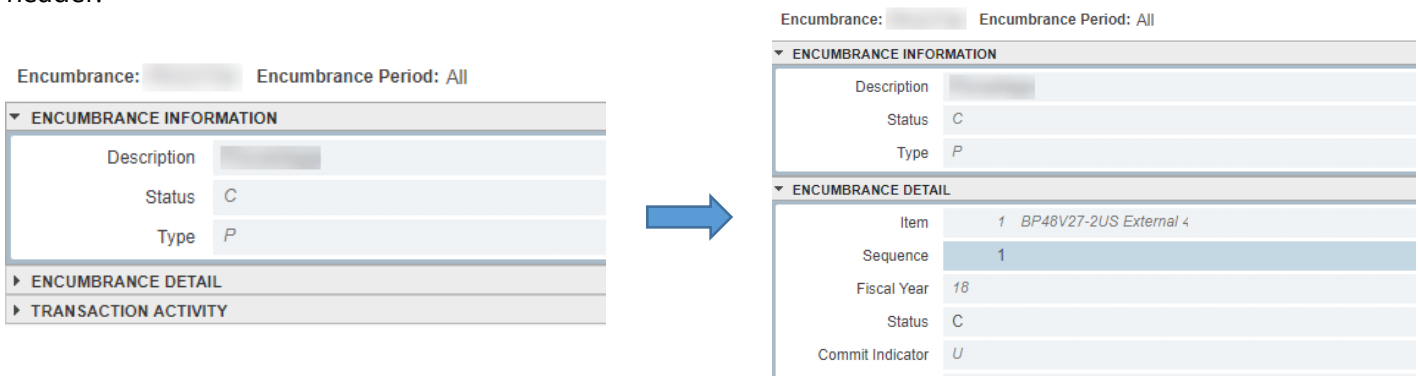
Data Table Customization

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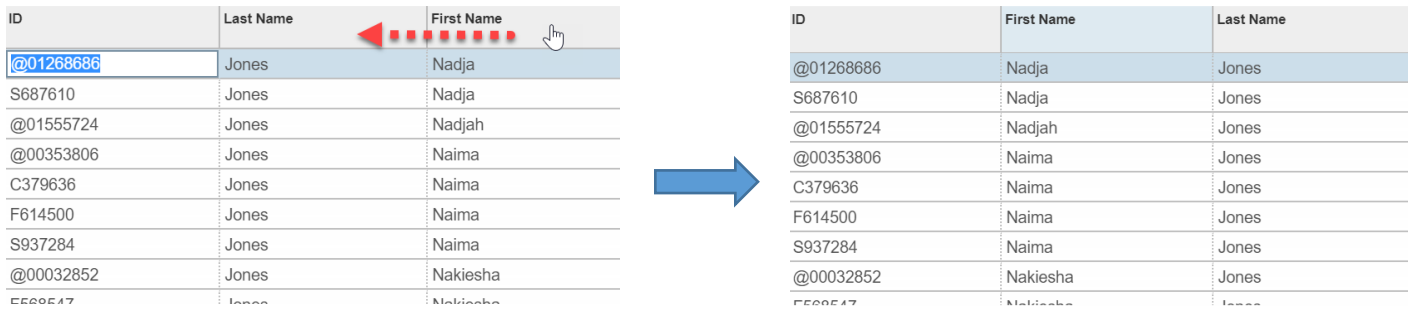
Resize Columns

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

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.

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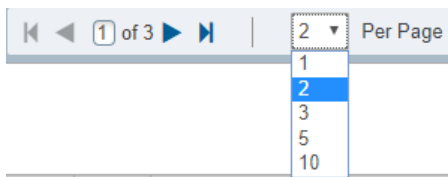
Note: Customizations applied to data tables can be preserved for future sessions. See the *Banner Page User Preferences* section appearing later in the reference guide.

Section Navigation Controls

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

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.
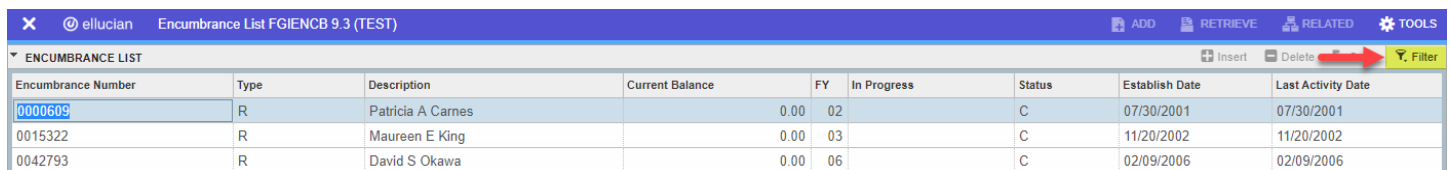
2. The filter feature appears with a set of default data fields and other options.
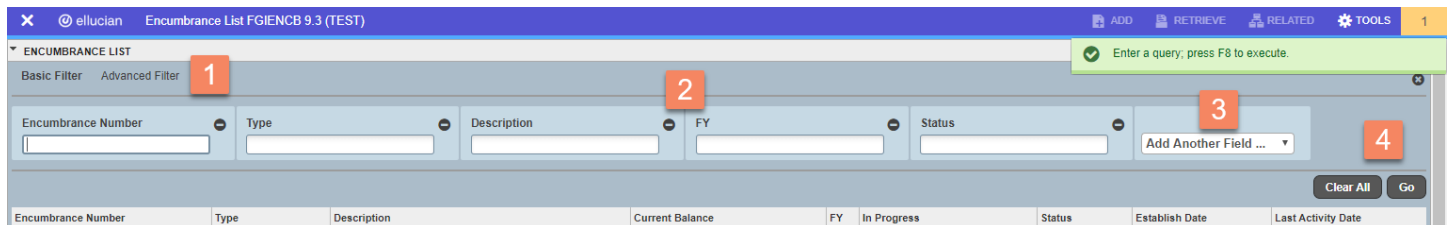
Area	Description
1	Switch between Basic and Advanced Filters. Default is set to Basic Filter.
2	Current data fields active for the filter
3	Add another data field to the filter
4	Buttons to clear all data fields from the filter and to execute the filter on the data entered

Basic Filter

The basic filter will search on the exact information you provide in the active data fields.
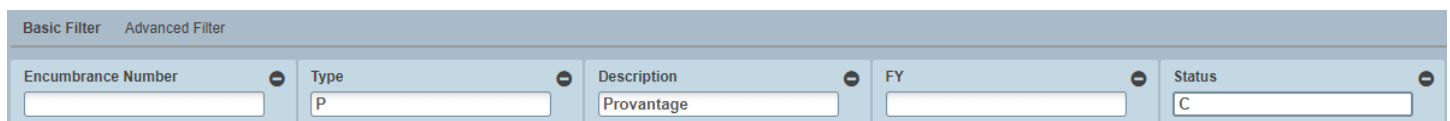
In the above example, this search displays records that satisfy all of the search conditions. For searches that have complex conditions, use the Advanced Filter. Note: The wild card (%) is supported in searches.

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.

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)

Basic Filter   *Advanced Filter*

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

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.

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.

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.

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.

*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.
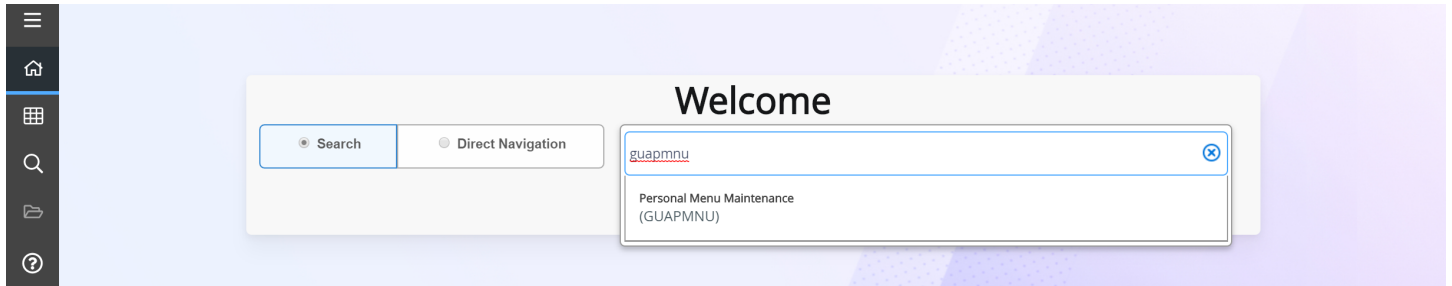
2. Click the *Go* button on the next screen that appears. Leave the username displayed in the *Personal Menu* field unchanged. The username is primarily for ARGOS and other internal Banner operations.
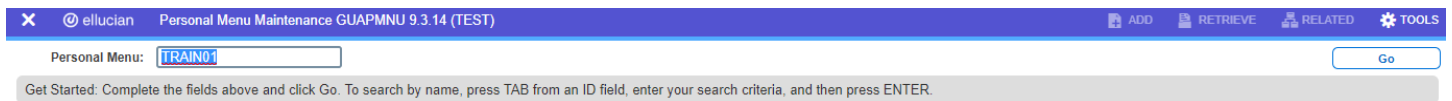
3. The GUAPMNU page appears with a list of available objects that can be added to your personal menu.
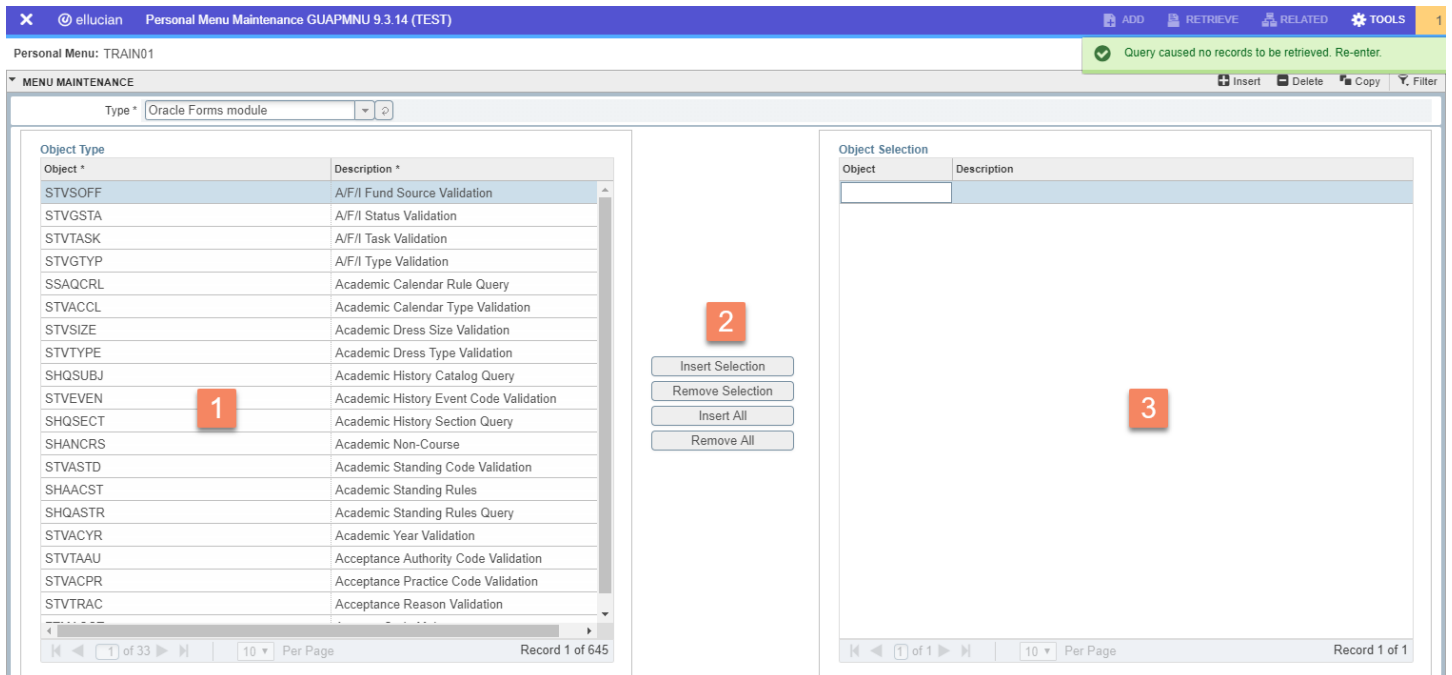
Area	Description
1	Object Type list will display objects that can be added to the personal menu
2	Selection controls to add/remove objects to the personal menu
3	Object Selection list displaying objects that will appear in the personal menu

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

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.

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.

Note: 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.

Banner Keyboard Shortcuts

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 shortcuts will work in Banner 8 if you are running Banner 8 with Application Navigator and have applied the keyboard shortcut configuration settings.	CTRL+M
Access Menu		CTRL+Y
Display recently opened items		CTRL+SHIFT+L
Search		CTRL+SHIFT+Y
Sign out		CTRL+SHIFT+F
Banner Document Management (BDM)		
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