BANNER 9 NAVIGATION

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REVISION HISTORY

Version	Date	Name	Description
1	9/5/18	Margaret Stewart	Initial procedures – Banner 9
2	Dec 2019	Kari Geske	Updates for fall upgrade

INTRODUCTION AND PURPOSE

The purpose of this document is to provide steps in basic navigation in the Banner 9 environment. The target audience is beginner users with no previous experience in Banner or those who would like a refresher. Banner is the system of record for the course catalog, schedule of classes, student records, financial aid, admissions, and student accounts.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

Banner is the Student Information System for UCR and the designated system of record. Please keep in mind that the Family Educational Rights and Privacy Act (FERPA) applies to all who have access to the system and student data. See Registrar.ucr.edu/privacy for details. Sharing of credentials/accounts is prohibited.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. All Banner Users

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

PAGES

The pages listed below are covered in this training.

| Page	Page Name	Description
N/A	Home Page or Landing Page	First page reached after logging into Banner 9, also called the Application Navigator

PROCEDURES

LANDING PAGE OVERVIEW

The following provides a survey of the first page encountered (i.e., the landing page) after logging into Banner 9.
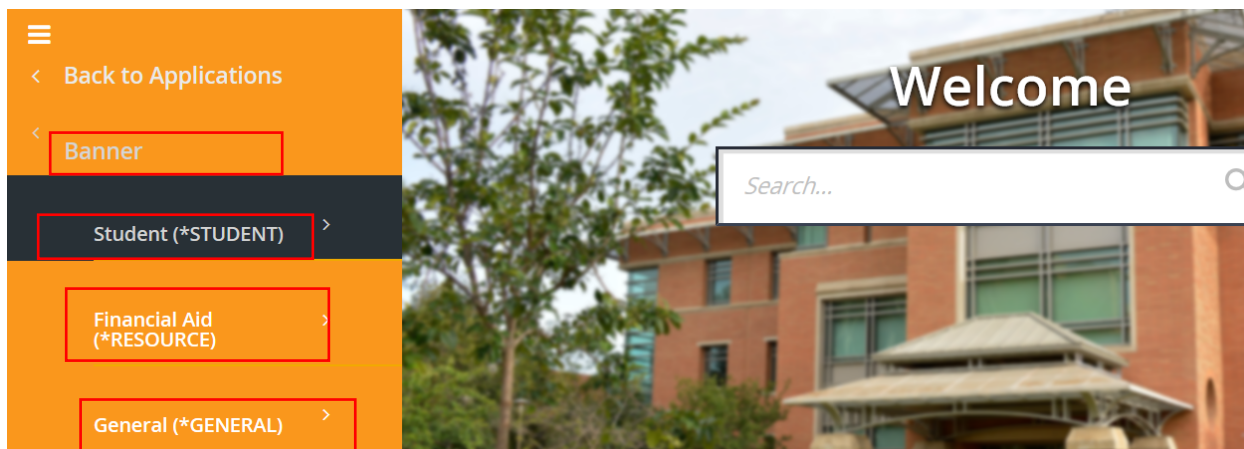
STEPS

1. To open Banner (Production):
   a. If user does not have access to Banner Production, have appropriate staff submit a ticket to update Banner access. It is important to utilize the Banner Training environment for training and exploration purposes.
   b. Go to **R' Space** and click on the **Banner Student Information System** icon.
   c. At the **CAS login** screen, enter **UCR Net ID** and **password**.
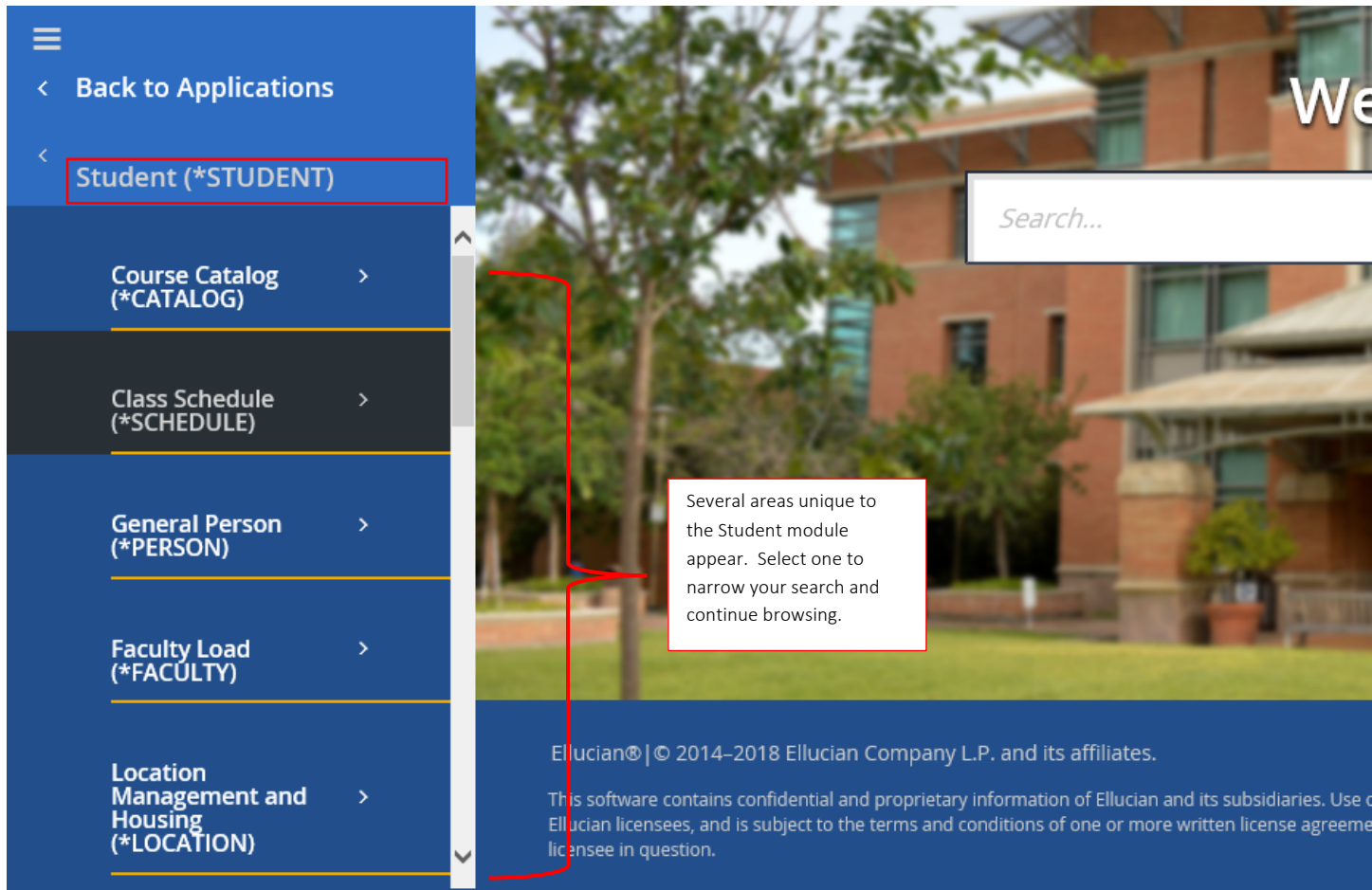2. The **Home page,** or landing page, is called the Application Navigator:
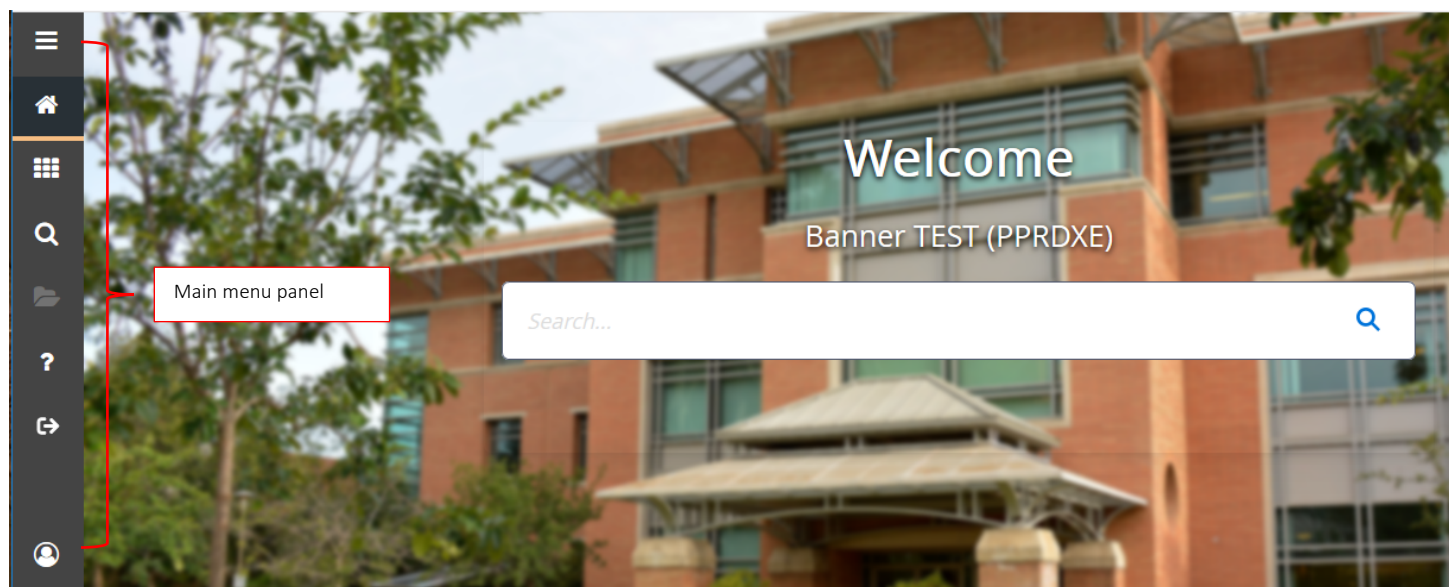
3. The **main menu panel** is located on the left side of the screen.
   a. The panel is "sticky" – it is always available no matter which Banner page is displaying and will always show the same icons.
   b. If you forget what the icon does, you can hover over it and a label will display.
4. The top icon is called the **Toggle Menu** icon. This is because you can show and hide the menu options with one click. Once opened, click again to close the menu and display only the menu option icons. Clicking the Menu icon displays the **names** of all the **menu options** on the home page.
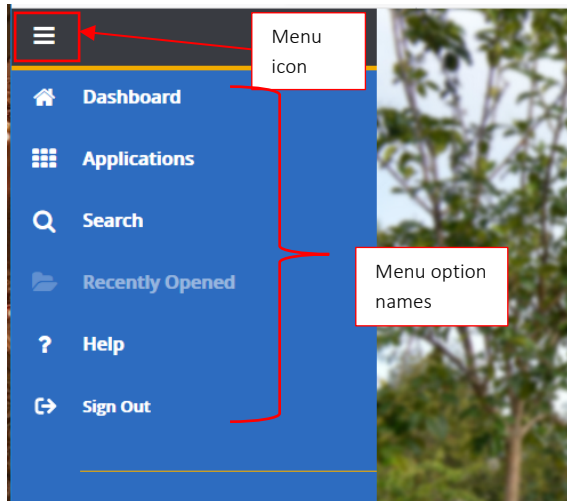
5. Next is the **Dashboard** or **Home** menu icon (the house icon). Use this to return to the **Home** page, or landing page, from any page you are viewing.

6. Next is the **Applications** icon (icon nine small boxes in a 3 x 3 grid). Use this icon to access the **Banner systems** available to the user.
   a. If an user selects Banner, they will see each module they have access to below. Select a module to browse and locate a page within.   Tip: use the arrow to the right of each option to expand and collapse the menu and view the page options.


   b. Example: after clicking arrow to the right of **Student** – you see:

Several areas unique to the Student module appear. Select one to narrow your search and continue browsing.

c. To return to the **main menu panel** – either click on the **Toggle** menu *or* click **Back to Applications** and then **Back to Main Menu**.

7. Next is the **Search** icon (icon is a magnifying glass) and is used to search for a desired page. You can search by the page name or description. You can also use the box in the center of the **Home** page to search for pages. Both search functions will automatically return possible results after 3 characters are entered; the results may match the page name *or* description.
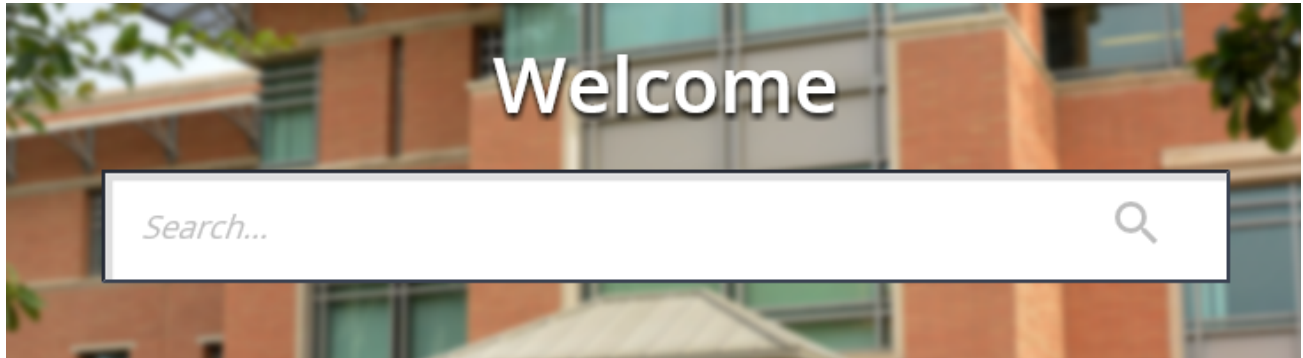
8. Next is the **Recently Opened** icon (icon is an open folder) which displays a list of pages that have been opened during the existing Banner session. You can easily return to a page by selecting it from this list.
9. Next is the **Help** icon (icon is a question mark) which takes you to online Page Help and the Keyboard Shortcuts.
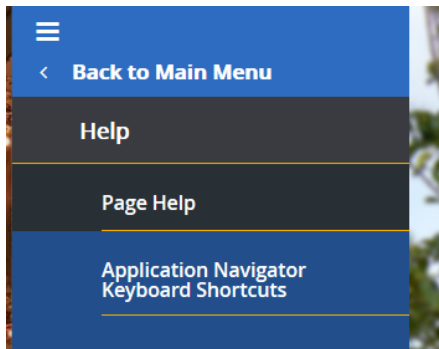
    a. Page help is detailed information about the page you are viewing. It does not work when viewing the Home page. Information about a given Banner page will display in a separate online browser window.
    b. The keyboard shortcuts can be used to navigate Banner with keyboard commands instead of your mouse.

10. Next is the **Sign Out** icon (icon is an arrow) which you use to exit Banner.

11. The final icon on the main menu panel is the **Profile** icon (icon is a person's profile) which is where you can see the user logged in and also where to go to configure your My Links using the My Preferences option. My Links is discussed in detail in a later section below.

PAGE IDENTIFICATION AND ACCESS

A Banner page is where a user can enter data and look up information. Pages have both a description and an abbreviated name with seven letters, such as the General Person Identification page, or SPAIDEN. The seven letters indicate the type of page you are viewing and are defined below.

COMPOSITION OF BANNER PAGE NAMES

1. **Position 1** of the Banner page name: identifies the Banner product owning the page.
   a. UCR uses the following four products. Each page will start with one of these letters:
      i. S = Student
      ii. R = Financial Aid
      iii. G = General
      iv. T = Student Accounts
2. **Position 2** of the Banner page name: identifies the application module owning the page.
   a. For example, following is the list of application modules for the **Student** product (pages that start with S):

Code	Product/Purpose
Position 2 for Banner Student	
A	Admissions
C	Catalog
E	Support Services
F	Registration/Fee Assessment
G	General Student

H	Grades/Academic History
I	Faculty Load
K	Reserved for SunGard Higher Education International
L	Location Management
M	CAPP
O	Overall
P	Person
R	Recruiting
S	Schedule
T	Validation page/table
U	Utility

3. **Position 3** of the Banner page name: identifies the object type code of the page:

Code	Type of Page/Process
A	Application
B	Base Table
I	Inquiry
P	Process
R	Rule Table, Repeating Table, Report or Process
V	Validation
M	Maintenance

4. **Positions 4, 5, 6, and 7** of Banner page name: identifies a unique four-character code for the page and tells you the most information about the specific function of the page. Here are a few examples:

Code	Purpose
***IDEN	Identification
***PINC	Position Incumbent

***STDN	Student Relation
***PERS	Person

ACCESSING PAGES IN BANNER

To navigate to a page, Banner 9 provides several options from the **Home page,** or landing page: the **Applications** icon, the **Search** icon, and the **search field** on the landing page. You can search for pages using these three tools.

Navigation option 1: the **Applications** icon. From the **Home page,** or landing page, click the **Applications** icon or use keyboard shortcut **Ctrl + M**. In this example, navigate to Student Records page **SPAIDEN (General Person Identification)**.

1. Click: **Banner**.
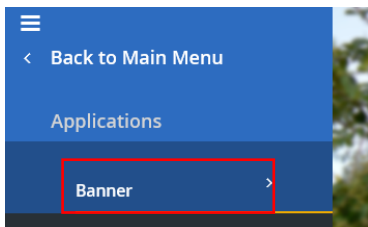
2. Click: **Student (*STUDENT)**.
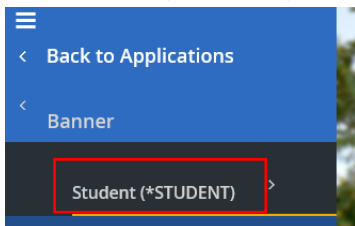
3. Click: **General Person (*PERSON)**.
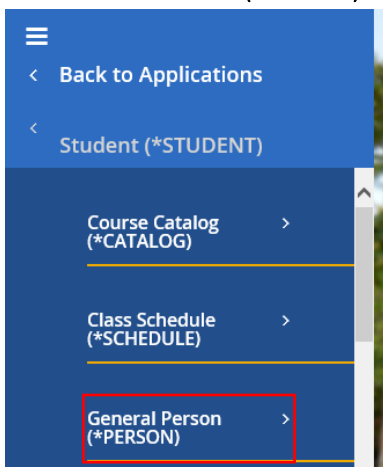
4. Click: **General Person Identification (SPAIDEN)**. The page will open.
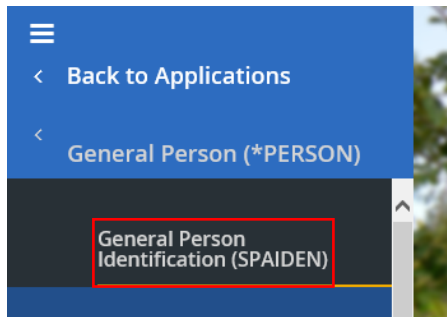
Navigation option 2: **Search** icon. On the **Home page,** or landing page, click the **Search** icon (the magnifying glass) or use keyboard shortcut **Ctrl + SHIFT + Y**. Key words, partial page names, or the full seven-character object identifier can be entered. In this example, search for a **Registration** page by entering **Reg** in the search box.

1. Enter at least three characters to display options containing those characters from the page name *or* the page description.
2. Use the scroll bar to the right to view all listed options and select the page you want to view.
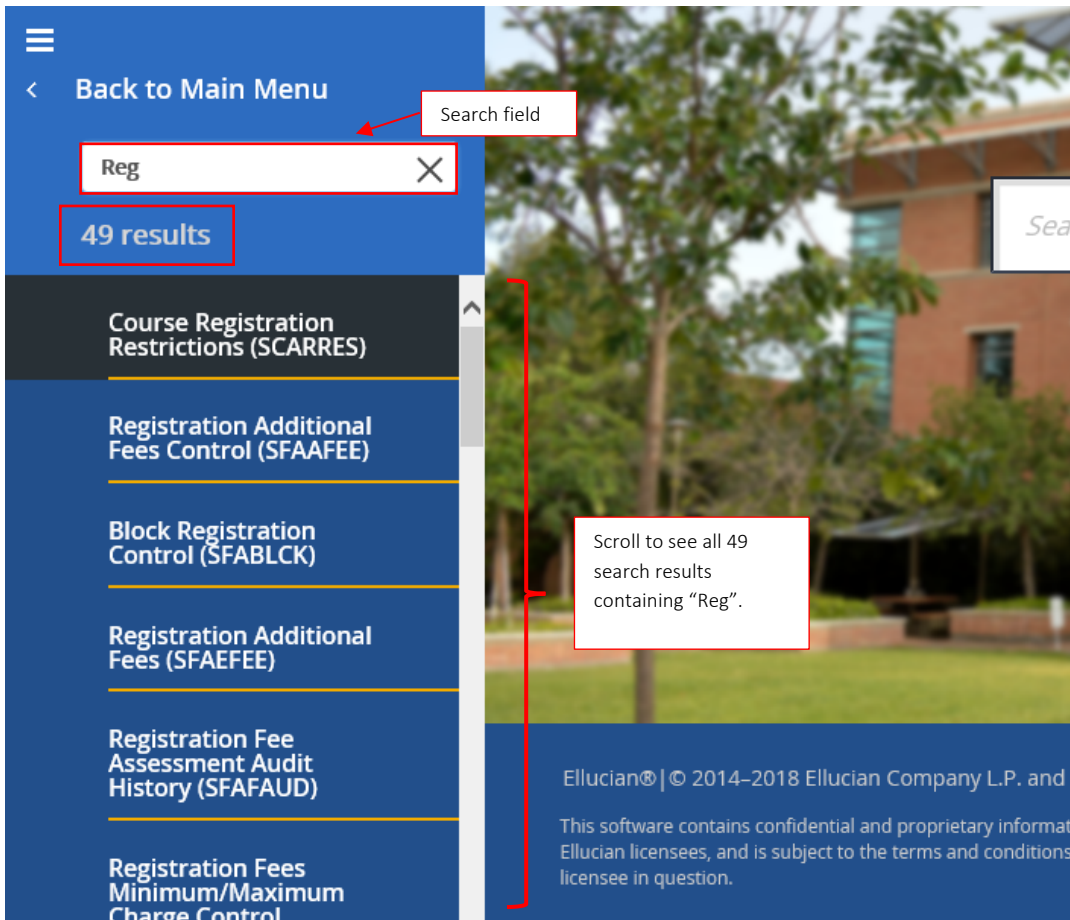
Navigation option 3: the **Search** field centered on the **Home page,** or landing page. In this search field, enter either key words or the full seven-character object identifier. In this example, search for a **Student Schedule Applications** page.

1. Entering at least three characters will display available options containing those characters from both the page name *or* the description.
2. Click in the **Search** field on the landing page, then enter **SSA**.
3. Select the desired page from the list. SSASECT is selected here.

Landing page search field

Search criteria

ssa

Schedule Section Query
(SSASECQ)

Schedule
(SSASECT)

Section Syllabus
(SSASYLB)

Section Comment
(SSATEXT)

Search results (use scroll bar to view all).
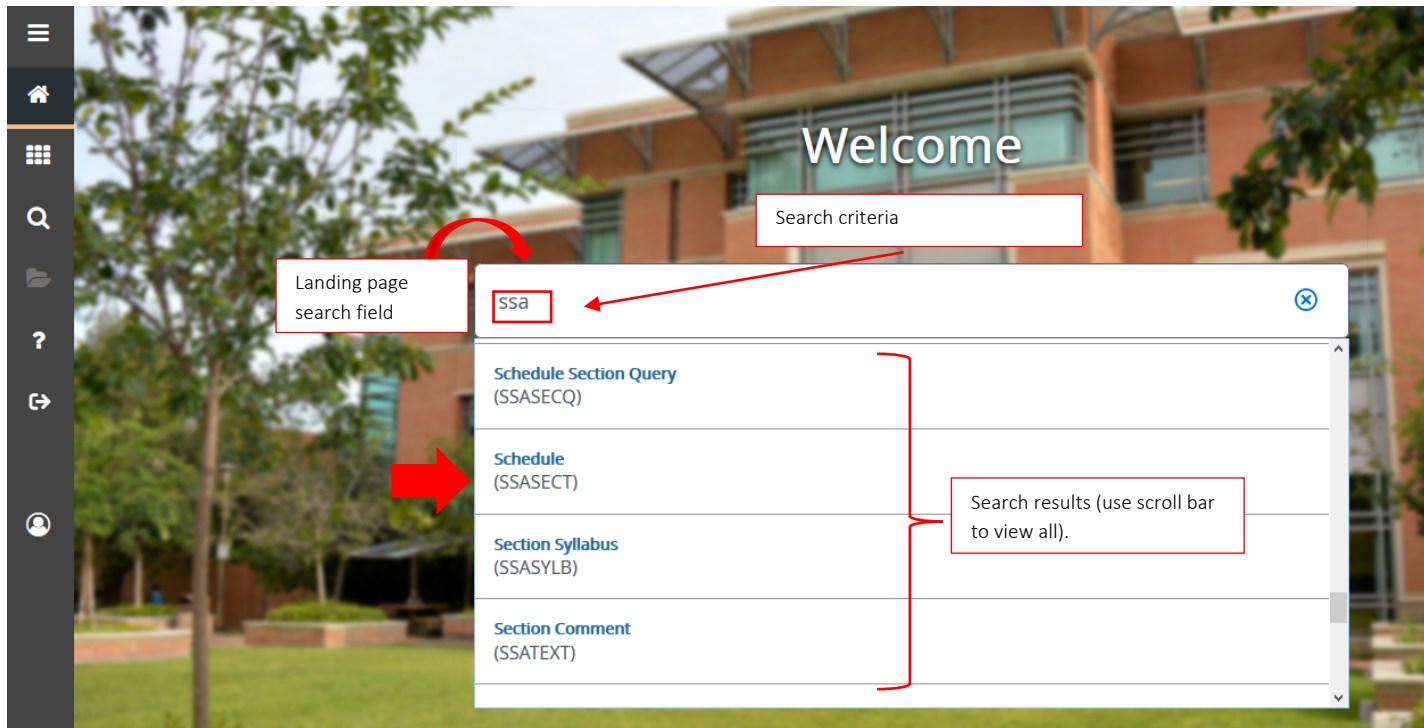
Schedule SSASECT 9.3.5 (PPRDXE)

Term: CRN: Go

Subject: Course:

Title: Copy CRN

Create CRN

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.

There are two additional ways to access Banner pages but they require you to set them up as they are customized by you and apply to your account only. Those two ways are My Banner and My Links; below are the instructions to configure those.

CREATING YOUR "MY BANNER" MENU

Users can create a their own favorite set of pages that they can save for easy reference from the Applications menu. The tool is called My Banner and will show on the Applications menu once an user has added pages to it. When you expand the menu you can view and select pages that you have saved there.

STEPS

1. Go to My Banner on the main menu
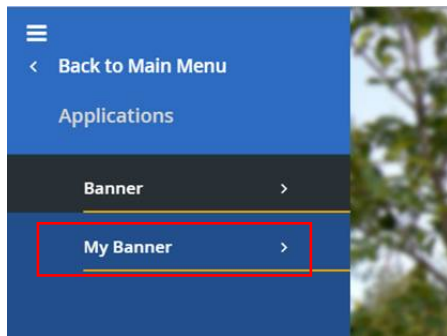
2. Select the option that says Empty; Select to build. (GUAPMNU)
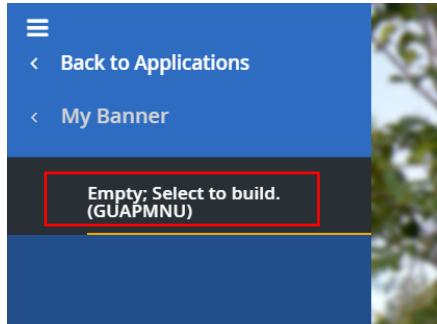
3. Your Net ID will automatically appear at the top of the page in the Personal Menu box. Click the Go button to move down the page.
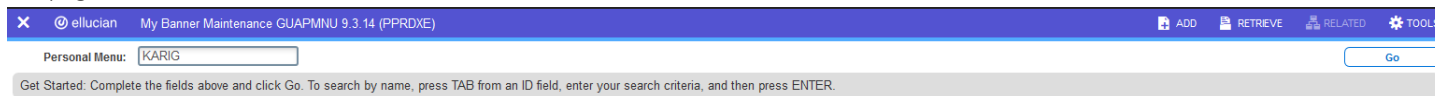
4. A list of pages to select from displays on the left in the **Object Type** and an **Object Selection** list appears on the right. To add a page to your **My Banner menu**, you will select the page from the list on the left (Object Type) and move it to the list on the right (Object Selection). The Object Selection will be blank if you have not added pages to your My Banner menu.
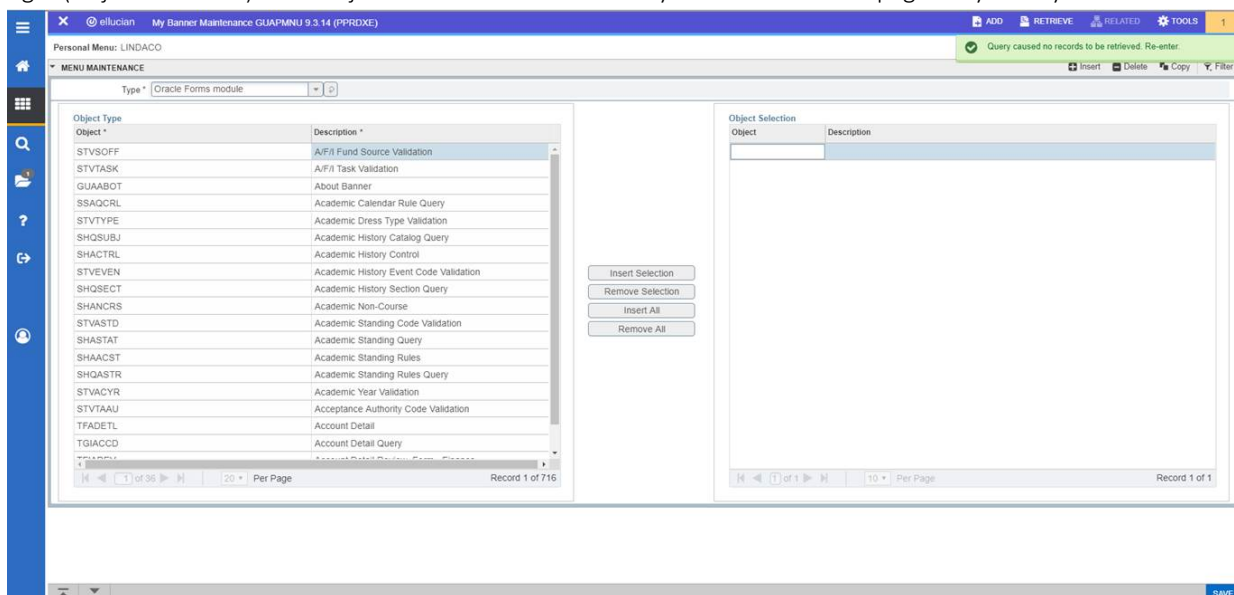
5. Make sure your cursor is in the **Object Type** menu as shown above. Click the **Filter** button at the top right; two fields, **Object** and **Description**, appear that you can use to locate the name of the page you want to select.

6. If you know the 7-letter page name (such as SPAIDEN), type it into the **Object** field. If you don't know the page name, you can search for it by using the **Description** field to enter a keyword(s). Use the **%** as a wildcard in your search if you think the word could appear anywhere in the page name (beginning, middle, or end). **Tip:** The % can be used as a wild card in many Banner searches.

7. Click **Go** to execute your search and the results will display. Adjust the column width of the **Object** column to see the **Description** of the page and confirm your selection.

8. Select the page you desire and double click on it so the **Description** font is a different color, usually royal blue. Here, SCARRES has been chosen after searching for description = %Registration%.

9.   If there are multiple pages that you want to add to your My Banner list, double click on each one you want to select so they are royal blue.

10. Once you have double-clicked the page, choose **Insert Selection** to move the page(s) to the **Object Selection** list.

11.   Repeat **steps 3-7** to add more pages. **Save**. The changes you make will be evident the next time you access Banner.

12. If you want to remove a page from your My Banner menu, double-click on the page in the **Object Selection** list on the right so that the **Description** turns blue.

13.   Then click the **Remove Selection** button. If you want to remove <u>all</u> pages from your My Banner menu, click **Remove All**.

14. **Save**. The changes you make will be evident the next time you access Banner.

CREATING YOUR "MY LINKS" MENU

Users can create a different set of their own favorite set of pages or external links that they can save for easy reference from the Applications menu called My Links. This is different from My Banner in that each link shows on the Applications menu and does not require clicking into a sub-menu and it can include external links. The tool is called My Links and will display the links you have selected on the Applications menu once an user has added links to it.

1. To get started, click on the user icon (icon of a person) on the home page, and then select the option for My Preferences.
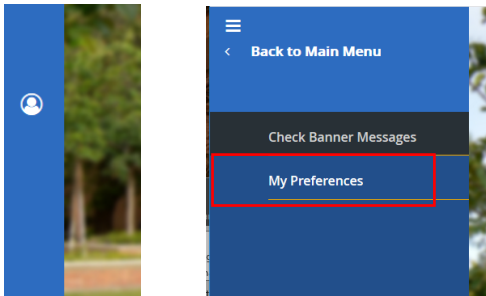
2. On the GUAUPRF page, click on the tab labeled My Links.
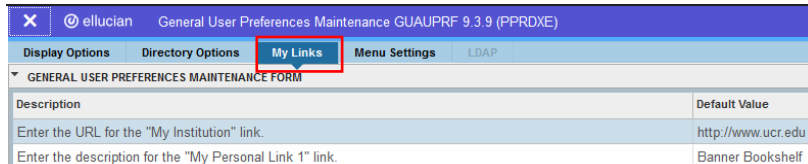
3. The first row is the insitituion link and will be pre-populated with www.ucr.edu and is not intended to be changed or utilized. The additional 12 rows on this page correspond to the 6 links that you can customize: the first row for each link is the description, the 2nd row is the external URL or Banner page name.

4. For example, you can choose for your first link an external link, such as the UCR Academic Calendar. To accomplish this, you would put the description "UCR Academic Calendar" in the row where it says "Enter the description for the "My Personal Link 1" link. In the row where it says "Enter the URL or Banner object for the "My Personal Link 1" link" you would type the external URL https://registrar.ucr.edu/calendar.

Description	Default Value	User Value
Enter the URL for the "My Institution" link.	http://www.ucr.edu	http://www.ucr.edu
Enter the description for the "My Personal Link 1" link.	Banner Bookshelf	UCR Academic Calendar
Enter the URL or Banner object for the "My Personal Link 1" link.	http://bannerdocs.ucr.edu	https://registrar.ucr.edu/calendar

5. Or, you can create shortcuts to Banner pages. The description row can be the 7-letter page name or the description of the page, but the row for the URL or Banner object must be the page name. See the examples for My Personal Links 2 and 3 below.

Description	Default Value	User Value
Enter the URL for the "My Institution" link.	http://www.ucr.edu	http://www.ucr.edu
Enter the description for the "My Personal Link 1" link.	Banner Bookshelf	UCR Academic Calendar
Enter the URL or Banner object for the "My Personal Link 1" link.	http://bannerdocs.ucr.edu	https://registrar.ucr.edu/calendar
Enter the description for the "My Personal Link 2" link.	Your second personal link description	General Student
Enter the URL or Banner object for the "My Personal Link 2" link.	Your second personal link URL	SGASTDN
Enter the description for the "My Personal Link 3" link.	Your third personal link description	SHACRSE
Enter the URL or Banner object for the "My Personal Link 3" link.	Your third personal link URL	SHACRSE

6. Once you have made your changes, click save. The three My Links that were customized as above (UCR academic calendar, General Student, and SHACRSE) will show as below the next time the user logs into Banner:
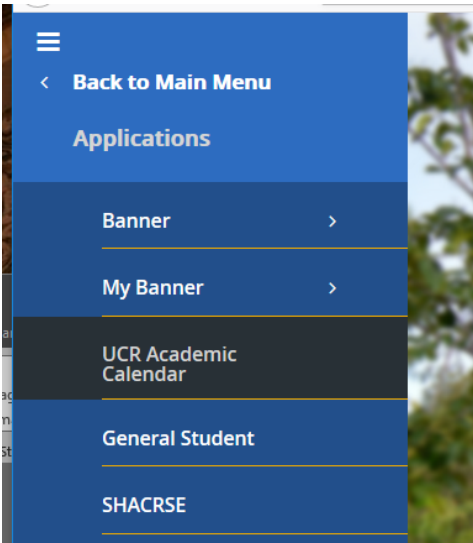
PAGE NAVIGATION

Navigating a page in Banner starts at the top of the page. Accessing other parts of a page can be done by clicking designated buttons or tabs.
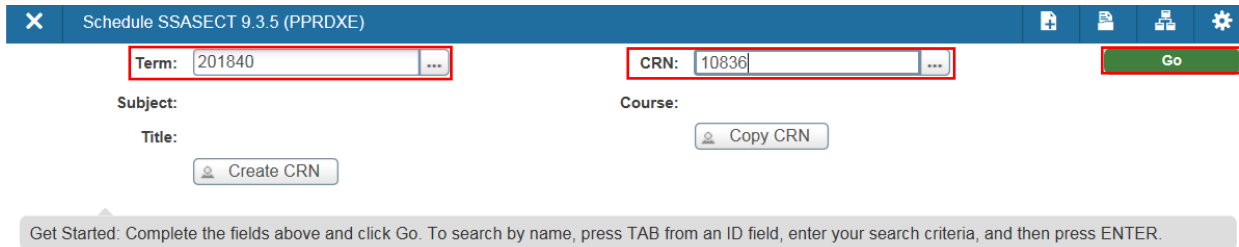
STEPS

1. When a page is opened in Banner 9, you can see the **Description**, **7-letter name**, and **instance** in which you are working.
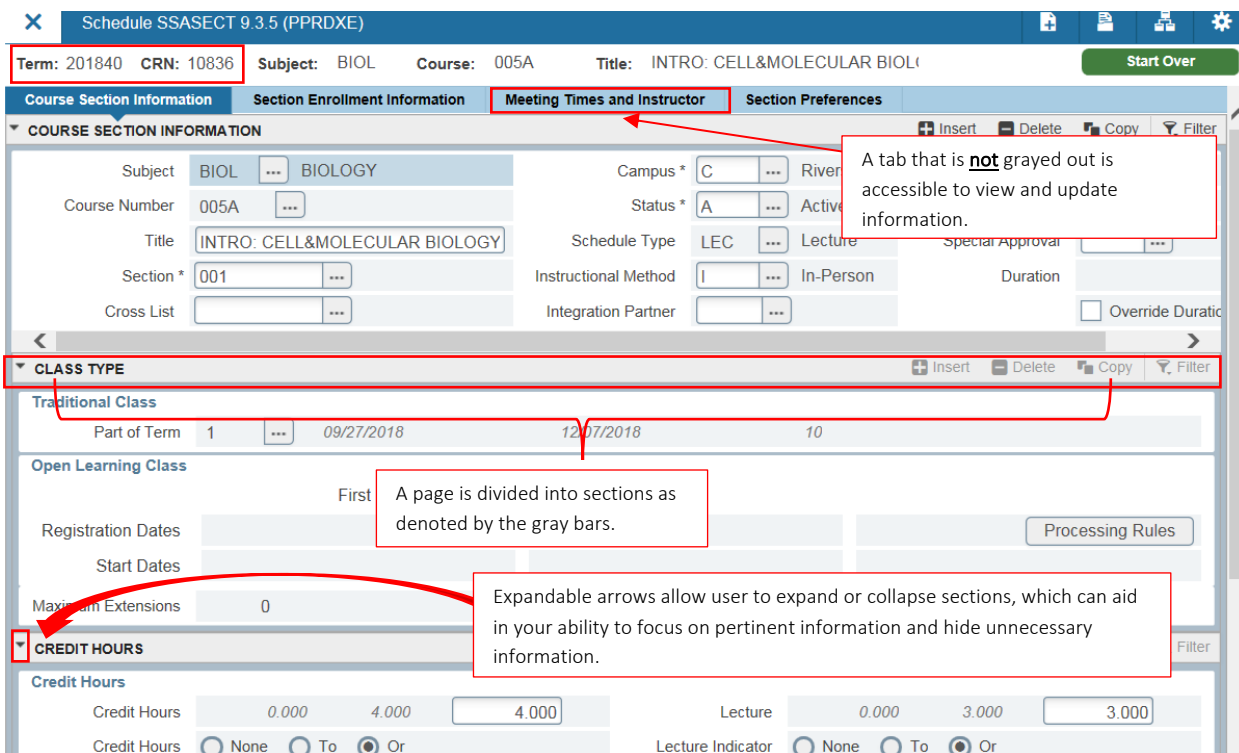

2. To proceed, enter the required fields at the top of the page in order to see the rest of the page. The following example will show page **SSASECT (Schedule).**
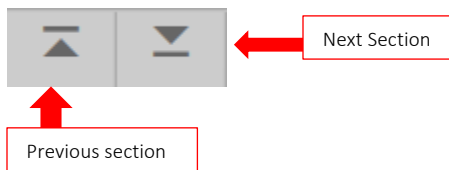
3. In **SSASECT**, enter the **Term code** and **Course Reference Number, or CRN**, which is a unique 5-digit number for a section.
   a. Other pages will have other required data; e.g., page SPAIDEN (a Person page) requires a Student ID number.
   b. Terms are defined in Banner first by the 4 digit year, then by the 2 digit code assigned to the desired quarter. Fall quarter of 2018 has a term code of 2018+40= 201840.
      i. 10 – Winter
      ii. 20 – Spring
      iii. 30 – Summer
      iv. 40 - Fall

4. For this example, **201840** is the **Term** code and **10836** is the **Course Reference Number,** or **CRN**. If you don't know these already, how to searching with the filter tool to find these items is covered in a section below.

5. Click **Go** and you can view information in **SSASECT** for **CRN 10836**. The information at the top collapses but is still viewable.

6. To navigate between fields, press **Tab** to go forward one field or **Shift + Tab** to go backward one field.
7. To navigate between sections and tabs, use the **Next Section** and **Previous Section** buttons located at the bottom of the page.

8. You can also click on the tab you want to view, such as the **Meeting Times and Instructor** tab.

9. The functions **Insert, Delete, Copy and Filter** can be done within a section. Please note: the cursor must be in the section to activate these functions.
   a. Use **Insert** to add a new, blank row below your cursor.
   b. Use **Delete** to delete the highlighted row.
   c. Highlight a row/record you want to copy and use **Copy** to duplicate the data to a new row below that Banner inserts.
   d. Use **Filter** to narrow down the number of rows displaying by qualifying search criteria.

10. The gray bar at the bottom of the page with the **Activity Date** and **Activity User** of the time and user name of the last person to update the page.

11. The **Add** and **Retrieve** buttons – related to **Banner Document Management** for users who utilize this system:
    a. Add Documents – shortcut key Alt + A.
    b. Retrieve Documents – shortcut key Alt + R.
    c. Both functions work via **ApplicationXtender Web Access**.

12. The **Related** menu button – provides easy access to pages associated with the current page.
    a. This menu is searchable using the magnifying glass space at the top. Just type to search for a page name or description.

13. Through the **Tools** menu button (icon that looks like a gear), you can move to other tabs in a page by selecting the tab name. You can also clear a record or field, print your page, export data, or adjust the page layout.

a. This menu is searchable using the magnifying glass space at the top. Just type to search for a page name or description.

b. Regarding page layout (listed at bottom of the **Tools** drop-down menu), the default selection is **Compact** which reduces the amount of space between fields and requires less scrolling. You can change to **Expanded** to increase the space between fields which will last as long as you stay logged into this session. In other words, the selected page layout will apply to all pages and will remain unless changed again on the **Tools** menu.
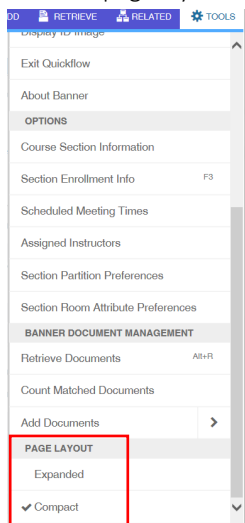

14. The **Notification Center** is located at top right of the page and will display messages communicating one or more alerts, as indicated by the number appearing in the square. Click on the square with the number to hide the alert.

a. Notifications have three alert levels indicated by the background color: successful messages or informational, warnings, and fatal errors.


b. An example of an informational message (light blue) is when you are looking at a page to which you have query access, which means you can view the page but cannot make changes to it.
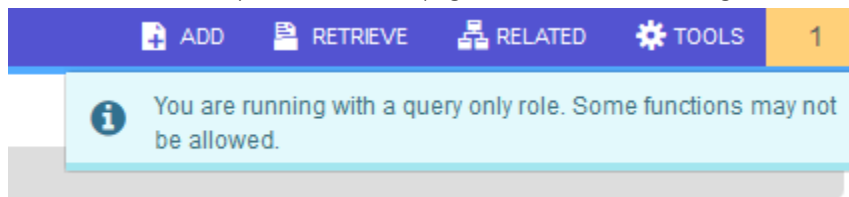
15. To return to the **top of the page** to enter different data, click **Start Over,** located in top right corner of the page.

16. When you want to return to the Home page, click the **Dashboard** icon. Your recently opened pages will now reflect the history of pages viewed.
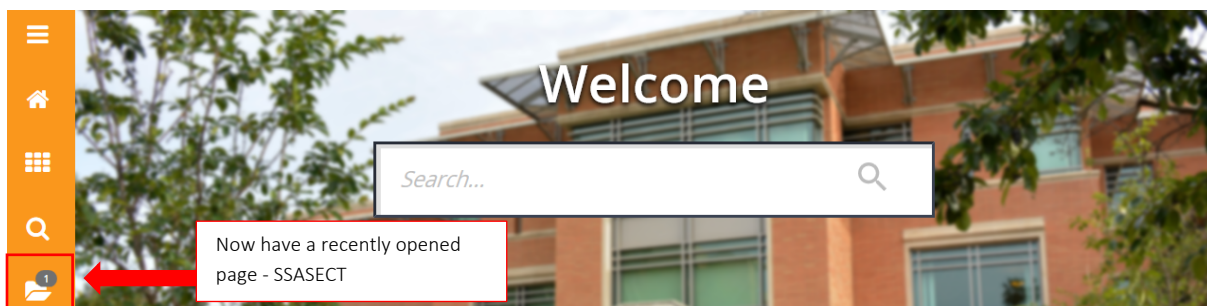
17. In pages that have a lot of rows or columns, you can adjust your view using the following methods:

    a. You can sort the data by any column by clicking on the header. In this example, the rows are sorted by the **Subject**.

Select	Term	Part of Term	Campus	Level	CRN	Subject ▲	Course	Section	Hours	Grade	Grading Mode	Repeat	Course Title
🔍	201310	1	C	U	11334	BUS	107	001	4.000	B-	L		ORGANIZATIONAL B
🔍	201220	1	C	U	11478	BUS	010	001	4.000	B+	L		INTRODUCTION TO
🔍	201240	1	C	U	12453	CPLT	017A	001	5.000	A-	L		MASTERWORKS OF
🔍	201140	1	C	U	12713	CS	008	003	4.000	A	L		INTRODUCTION TO
🔍	201220	1	C	U	13971	ENGL	001C	012	4.000	A-	L		APPLIED INTRMTD (
🔍	201210	1	C	U	28569	ENGL	001B	020	4.000	B-	L		INTERMEDIATE CON
🔍	201420	1	C	U	14490	ETST	001	001	4.000	B+	L		RACE & ETHNICITY:
🔍	201320	1	C	U	14546	ETST	001	001	4.000	W	L		RACE & ETHNICITY:
🔍	201310	1	C	U	15390	HIST	020	001	4.000	B	L		WORLD HIST: TWEN
🔍	201220	1	C	U	15850	LGBS	001	001	4.000	C+	L		INTRO LES,GAY,BI&
🔍	201140	1	C	U	16357	MATH	015	001	4.000	A-	L		CONTMP MATH HUM
🔍	201210	1	C	U	26343	PHIL	003	001	4.000	C+	L		ETHICS AND THE ME
🔍	201410	1	C	U	17699	POSC	010	001	5.000	A-	L		AMERICAN POLITICS
🔍	201320	1	C	U	17464	POSC	020	001	5.000	W	L		WORLD POLITICS
🔍	201420	1	C	U	19749	SOC	184	001	4.000	B	L		ENVIRONMENTAL S

    b. You can adjust the width of the columns by hovering over the divider between column headers until ◄‖► appears and drag the column width to be greater or smaller.

    c. You can change the order of the columns on the page by dragging and dropping the column header to the left or right and the column will move.
    Note: Changes you make in the grid display are not saved, if you close the page and then re-access the page, the system resets to the defaults.

    d. You can utilize the arrows at the bottom to browse information by page, or change the number of records that show on a page.

⏮ ◄	1 of 32 ► ⏭	10 ▾	Per Page		Record 1 of 320
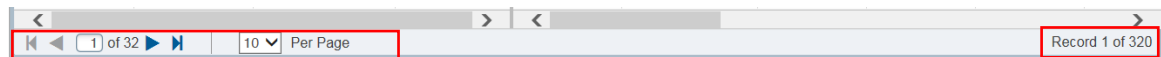
    e. Some pages have multi-record and single-record toggle buttons at the top. The purpose is to allow the viewer to see all information for one row in a condensed page format and reduce the need to scroll. To utilize this feature, check that the page has the buttons at the top.

ADD	RETRIEVE	RELATED	TOOLS

Start Over

⊞ ☰ | ➕ Insert | ➖ Delete | 📋 Copy | 🔽 Filter
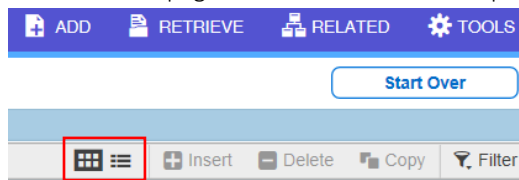
If the buttons are present, highlight the row you want to view all information for and click the Single Record button.

Registration Audit | Registration Error Message

▼ STUDENT COURSE REGISTRATION AUDIT   ⊞ ☰ | ➕ Insert ➖ Delete 📋 Copy 🔽 Filter

Sequence Number	3	Level	G	Status Date	09/24/2018
Term	201910	Grading Mode	L	Add Date	09/24/2018
CRN	42376	Attempted Hours	0.000	Block	
Subject	BIEN	Credit Hours	0.000		
Course	201	Bill Hours	0.000	Message	Permission by Department
Section	021	Source	TEMP	Error Flag	F
Campus	C	Course Status	RE		

⏮ ◄ 1 of 1 ► ⏭   20 ▾ Per Page   Record 3 of 16

To return to the original list of rows, click the Multiple Records button.

SEARCHING FOR RECORDS AND USING THE FILTER FUNCTION

In Banner, searching for a record is performed by filtering on selected search criteria.

EXAMPLE 1 – SEARCH FOR A STUDENT BY NAME

1. In this first example, the search is to find a student when you don't have the Student ID in SGASTDN. Go to SGASTDN and click on the Search button (icon with 3 periods) next to the ID field.

2. Click on the Person Search option to search by name.

2. A page called **Person Search**, or **SOAIDEN** will open. To locate records with last name Sanchez and first name starting with M, enter Sanchez in the last name field and M% in the first name field. In Banner, **% is a wildcard** that represents one or more undefined characters. The **wildcard** can be placed at the **beginning, middle, or end** of the search criteria such as:
   a. McDon%, Kar%
   b. %en, John%
   c. Arthur, Jen%Lynn

3. Click **Go** or press **F8** to execute your query or search. Records that meet your criteria display. You can utilize the date of birth and middle name fields to help identify your student (to abide by FERPA the data is hidden below).

The bottom of the page indicates how many records are returned. Use the arrows and the drop down menu to view additional records. You may also choose to narrow your search by using the **Filter Again** button and entering different criteria.

4. Once desired record is found, highlight it and click the **Select** button at bottom right of the page. The student selected is now at the top of the page.

EXAMPLE 2 – SEARCH FOR A STUDENT BY SSN

You can search for a student by the social security number in Banner. **Please note: you should never ask a student to provide all or part of their SSN by phone or email.** If the student is seeing you in person or if you have one of the few institution forms that requires it, you can utilize this search method.

1. Follow the same steps as example 1 above, except in step 2 click on Alternate ID search.

2. A page called SSN/SIN Alternative ID Search GUIALTI opens. Enter all (or part of the SSN using the wildcard % for missing numbers) into the SSN field and click Go or press F8 to execute your query or search.

3. Select the student from the list. Note: You can also access GUIALTI directly from the **Home page** to search by SSN.
4. If you are having trouble locating a record, some pages provide an Advanced Filter option at the top of the page.

5. You can choose which fields on the Advanced Filter you want to search by, which operator (Equals, Contains, etc.) and the value Banner looks for. Remember that the % can be used as a wildcard before, in the middle of, or at the end of a word or words to broaden your search. When possible, it is recommended to use the Equals operator to improve the search time.

EXAMPLE 3 – USE THE FILTER WITHIN A SECTION ON A PAGE

1. In this example, filter a list of Learning Community course blocks that are associated with a given student cohort. Navigate to page **SFABRDF (Block Rule Definition)**. In the **Term** field, enter **201840**. Click **Go.**
2. Make sure cursor is in one of the records in the **Block Rules Definition** section and click the **Filter** button.

3. Because **Cohort** does not initially show as a filter criteria, from the drop-down menu next to **Add Another Field** select **Cohort**. In the **Cohort** filter, enter **LHFATR05RN,** or, if you only know part of the cohort, enter that, such as LH%RN. Enter any additional criteria and click **Go**.

4. Your results will be displayed based on the filter criteria listed at the top of the page.

Or if you entered a LHFATRN05RN in the cohort filter field:

EXAMPLE 4 – FILTER FOR A VALUE FROM A DEFINED TABLE

1. In some forms when you search for a value, a window will open with a list of defined values to choose from.

2. You can scroll through the list, use the arrows at the bottom to browse the pages, adjust the number of records per page that display, or utilize the Criteria auto-search field at the top. To utilize the Criteria auto-search field, start typing either a code or a description in that field and the list will automatically return possible results. For example, typing hall in the example above brings back the values with "hall" in the code or description:

3. Select the value from the list and Banner will place it in the field of the original page.

HELP FUNCTION

The help function can be utilized from a Banner page (not on the home page or landing page).

1. In this example, access help related to the page **SPAIDEN (General Person Identification)**. Navigate to **SPAIDEN**.
2. On the **main menu panel**, click the **Help** icon (icon that is a question mark), then **Page Help. Banner Online Help** will open in a new browser window to provide information on use/purpose of the page. It also:
   a. Provides details on page contents/sections/tabs.
   b. Has a **Content** tab and a series of sub-menus that you can expand and collapse to allow you to browse topics categorically.

Content

(SPAEMRG) page
□ **General Person Identification (SPAIDEN) page**
  □ Main window
    – key block
    – Current Identification section
  – Alternate Identification window
  – Address Information window
  – Telephone window
  ⊞ Biographical window
  – Email window
  – Emergency Contact window
  – Additional Identification window
⊞ General Person (SPAPERS)

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/a... ...on captured and maintained in this page. Any changes or additions to a person's/... ...mation 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 **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 GORCMUS, the user can access GOAMTCH from the Banner menu system.

Series of sub-menus that expand and collapse

Information about the purpose of the page and its connection to other pages

KEYBOARD SHORTCUTS FOR NAVIGATING BANNER

Users have a choice when it comes to navigating Banner. They can use their mouse, or they can use keyboard shortcuts. Below is a list of the keyboard shortcuts to perform navigation functions.

Action	Keystroke
Cancel Page, Close Current Page, or	CTRL+Q
Choose/Submit	ENTER
Clear All in Section	SHIFT+F5
Clear One Record	SHIFT+F4
Clear Page or Start Over	F5
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
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
Page Tab 1	CTRL+SHIFT+1
Page Tab 2	CTRL+SHIFT+2
and so on	and so on
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
Toggle Multi/Single Records View	CTRL+G
Tools Menu	ALT+SHIFT+T
Up/Previous record	Up Arrow
Application Navigator	
App Nav - Access Help	CTRL+M
App Nav - Access Menu	CTRL+Y
App Nav - Search	CTRL+SHIFT+Y
App Nav - Sign out	CTRL+SHIFT+F

FINAL QUIZ

1. After logging into Banner 9, what is the name of the first page encountered?
    a. Landing page

2. True or False: a user needs to return to the landing page to access the main menu panel.
    a. False – the main menu panel is "sticky"; it is always available no matter which Banner page is displaying.

3. Clicking the Applications icons displays the _____ _____ available to the user.
    a. Banner systems

4. What are the four Banner products UCR licensed?
    a. Student, Finance, Financial Aid and General

5. What are the three options to navigate to a Banner page from the landing page?
    a. Applications icon, Search icon and the search field on the landing page

6. Navigating a page in Banner starts in the _____ block.
    a. Key

7. True or False: to use the Insert, Delete, Copy or Filter functions in a section, the cursor must be located in the section.
    a. True

8. What is the wildcard symbol used in filtering/querying that represents one or more undefined characters?
    a. %

9. Name two ways to navigate between sections & tabs on a Banner page.
    a. Click on the desired tab directly; or click on the Next Section or Previous Section buttons at the bottom of the page.

10. True or False: a user can access Banner online help anywhere in the system.
    a. False – user must be on a Banner page to utilize online help.