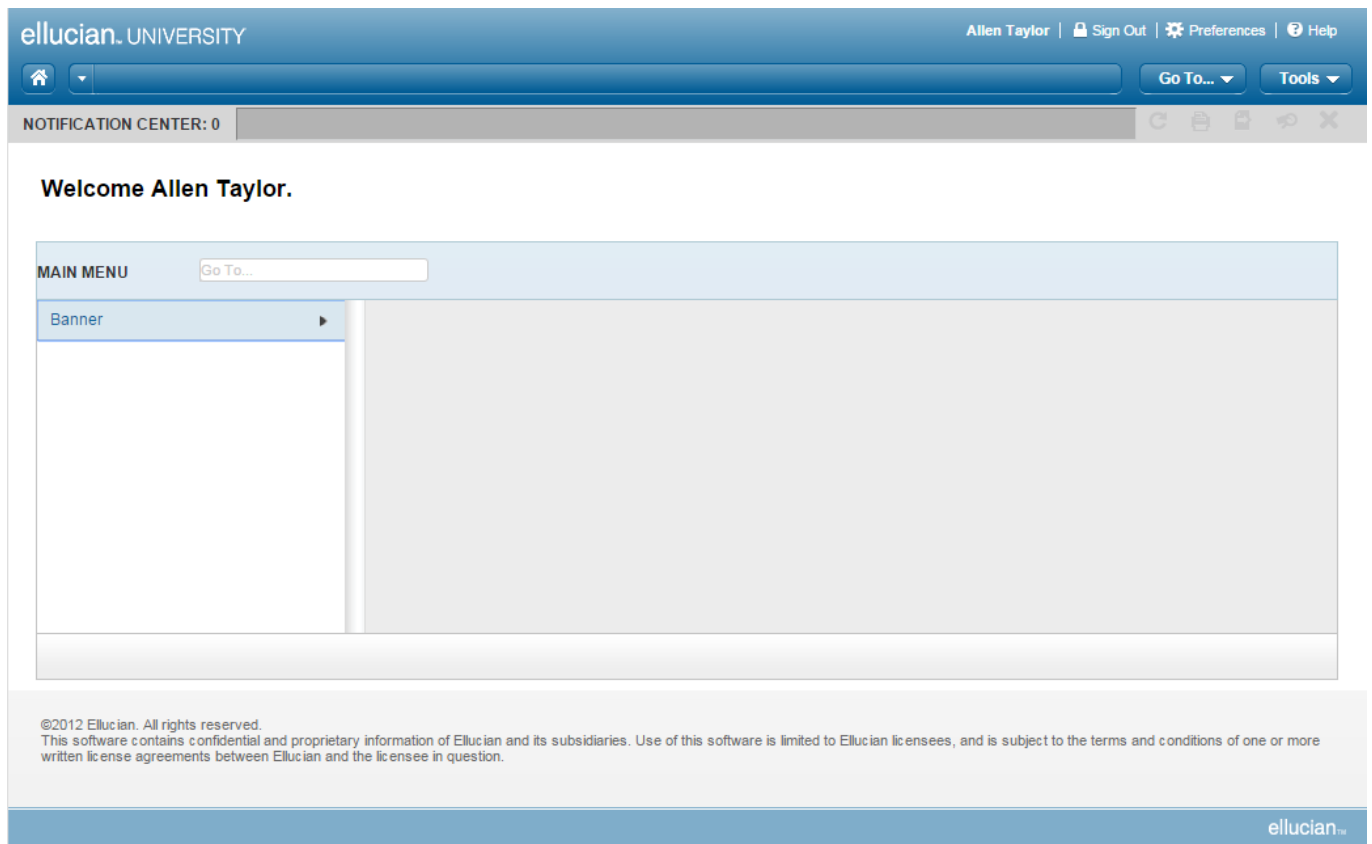




Banner XE Navigation Overview

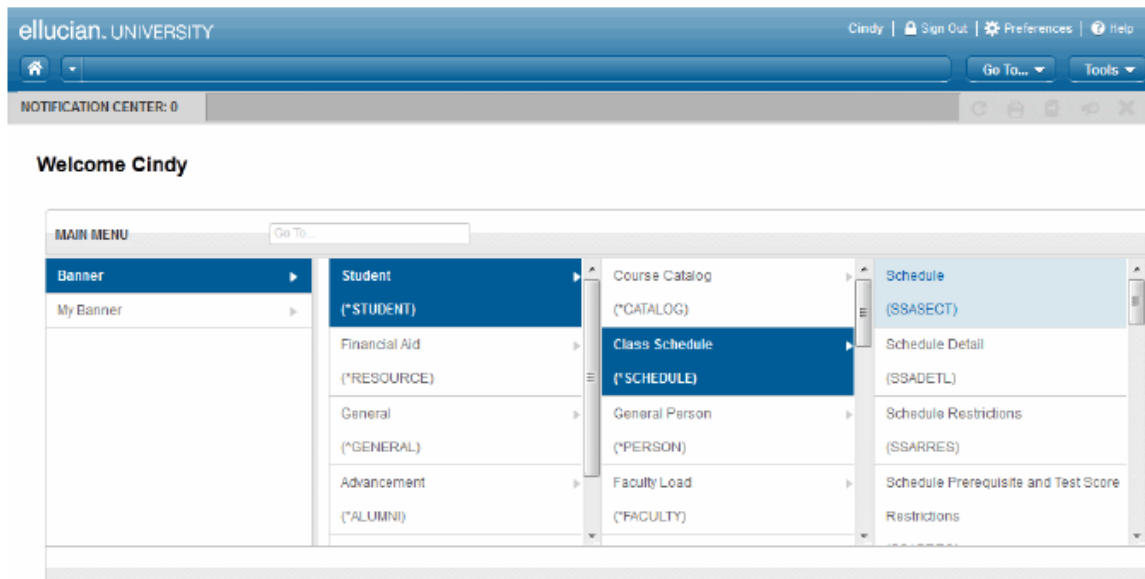
1. Access Banner XE under the Production Instance Links on the Banner Links website (<http://www.lehigh.edu/go/bannerlinks>). You will have to authenticate to view the website. You should choose the appropriate Banner XE link based upon what task you are trying to accomplish. For example, if you wanted to create sections of a course, you would select the link for **Banner XE Student Class Schedule**. Banner XE is not dependent on any particular browser or operating system so use whichever you prefer. **NOTE:** Although Banner XE is now web-based, you should not use your browser's back or forward arrows to navigate within the application.
2. Login to Banner XE with your credentials (the ones you would use to access your computer or Lehigh email). You'll see the new Banner XE interface.



The remainder of this training guide is select sections taken from the Banner XE Getting Started Guide provided by Ellucian.

Access and navigate within a page

1. Use the Main Menu to select the product, application, and page.



OR


Use the **Go To** field on the Main Menu to access a page directly. You can enter all or part of the short name or long name.

2. Enter required information in the key block of the requested page.
3. Click **Go**.
4. Enter data in additional sections as needed.
5. Click **Save**. (Located at the bottom, right corner)

Return to the key block

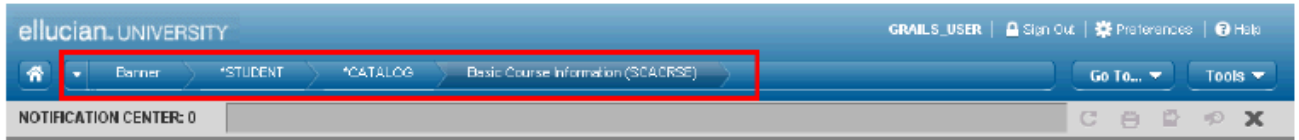
If you are on a page and want to return to the key block to enter new data, click **Start Over**.

Display the Main Menu

If you are on a page and want to display the Main Menu, click the  button between the Home button and the bread crumb trail.

Bread crumb trail

A breadcrumb trail, located at the top of the page, shows the path to the current page. You can click any item in the breadcrumb trail to open the Main Menu.

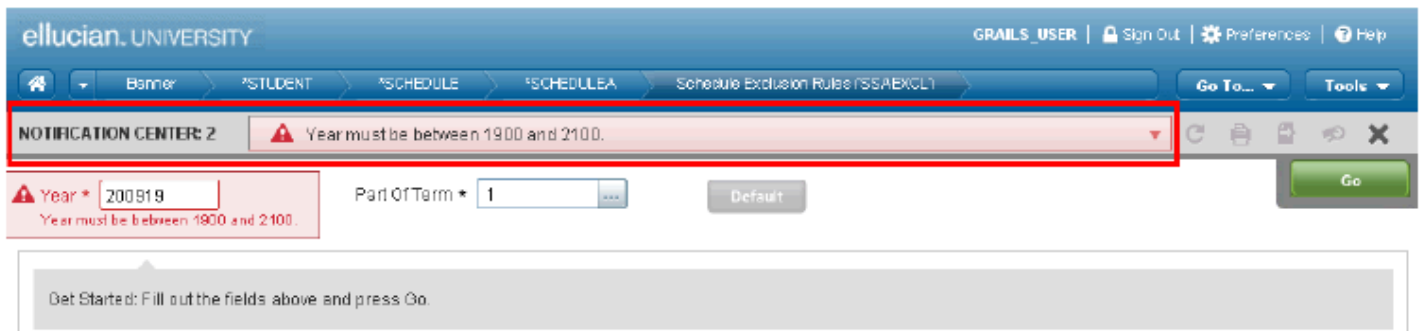


Notification Center

The Notification Center, located under the breadcrumb trail, displays information such as:

- Key block, page, and field error messages (including links to page-level errors)
- System prompts
- Successful save of data
- Autohelp information
- Confidential and deceased messages
- Record-specific messages
- Number of messages to be corrected to continue in the page

The following sample shows an error message in the Notification Center:



Key block

The first block on most pages contains key information. The key block determines what data is entered or displayed on the rest of the page. All information on the page refers to the key block. The key block stays on the page as subsequent sections are displayed.

When the cursor is in the key block, enterable fields in the key block are enabled. When you leave the key block, enterable fields in the key block are disabled.

Sections

Pages are divided into sections that contain additional details for the key information. Each section contains related information.

If a section cannot be modified, the phrase (*READ ONLY*) is displayed next to the section name. If a user has a query-only role for an entire page, the phrase (*READ ONLY*) is displayed next to the name of each section.

Sections of data are accessed by scrolling up and down the page. Some sections are accessed by using tabs that group information in a meaningful way. Subtabs denote child records of a parent or master section.

Buttons

Go To... button





The **Go To...** button, located next to the bread crumb trail, provides quick navigation as follows:

To access a specific page:	Click Go To... and enter the short page name (such as SCACRSE) or the long page name (such as Basic Course Information). Then click the returned page name.
To search for a page:	Click Go To... and enter three or more letters of the short or long page name. Then click the name of the desired page in the list of potential matches.
To go to an open page:	Click Go To... > Currently Open . Then click the name of the desired page in the list of currently open pages. Note: An icon is displayed next to the name of an open page if the page has unsaved changes.
To go to a recently opened page:	Click Go To... > Recently Opened . Then click the desired page name in the list of recently opened pages.
To go to a related page:	Click Go To... > Related to Current . Then click the desired page name in the list of related pages. Note: Related pages are the pages that appeared in the Banner 8.x Options Menu for page-to-page navigation.





Insert button

The **+ Insert** button, located at the bottom of some sections, is used to add a record in that section.

Collapse and expand buttons

The  and  buttons are alternately located to the left of the section name. Use the  button to collapse the section. Use the  button to expand the section.

Section navigation buttons


The  **Next Section** and  **Previous Section** buttons are located at the bottom of each page. Use the  **Next Section** button to navigate to the next section of data. Use the  **Previous Section** button to navigate to the previous section of data.

Required fields

An asterisk (*) displayed next to a section name indicates the section contains a field that requires a value before you save the record.

An asterisk (*) displayed next to a field name indicates the field requires a value before you continue on the page.

Field display options

In sections that have multiple records, you can mouse over a field label to display the  button next to the field label. This button displays sort options (if available) and a list of fields in the section. You can:

- Select the **Sort Ascending** option (if available) to sort records in ascending order, based on the field value.
- Select the **Sort Descending** option (if available) to sort records in descending order, based on the field value.
- Select the check box next to a field name to display the field label in the section, or clear the check box next to a field name to remove the field label from the section.

The following example shows the display options for the **Source** field. You can sort in ascending order, sort in descending order, and choose whether the **Source** and/or **Agreement Date** fields should be displayed.

ellucian. UNIVERSITY GRAILS_USER | Sign Out | Preferences | Help

Home > Banner > *STUDENT > *CATALOG > Course Detail Information (SCADETL) Go To... | Tools

NOTIFICATION CENTER: 0

Subject: ACCTAccounting ACCT, Course: 100, Term: 200810Autumn 2007, Course Title: Introduction to Accounting Start Over

Corequisites and Equivalents | Fee Codes | Degree Attributes | **Transfer Institutions** | Supplemental Data | Course Description | Course Text | Integration Partners

TRANSFER INSTITUTIONS Additional Information | [Filter] | [Add] | [Remove] | [Refresh]

From Term: 200810 To Term: 999999 End Term | Copy Term Data

Source	Agreement Date
No Records	

+ Insert

Sort Ascending
Sort Descending
 Source
 Agreement Date

If values for a field can be sorted, an up or down arrow next to the field name indicates the current sort order for the field. You can click the field label to reverse the sort order.

ellucian. UNIVERSITY GRAILS_USER | Sign Out | Preferences | Help

Home > Banner > *STUDENT > *CATALOG > Course Detail Information (SCADETL) Go To... | Tools

NOTIFICATION CENTER: 0

Subject: ACCTAccounting ACCT, Course: 100, Term: 200810Autumn 2007, Course Title: Introduction to Accounting Start Over

Corequisites and Equivalents | Fee Codes | Degree Attributes | **Transfer Institutions** | Supplemental Data | Course Description | Course Text | Integration Partners


TRANSFER INSTITUTIONS Additional Information | [Filter] | [Add] | [Remove] | [Refresh]

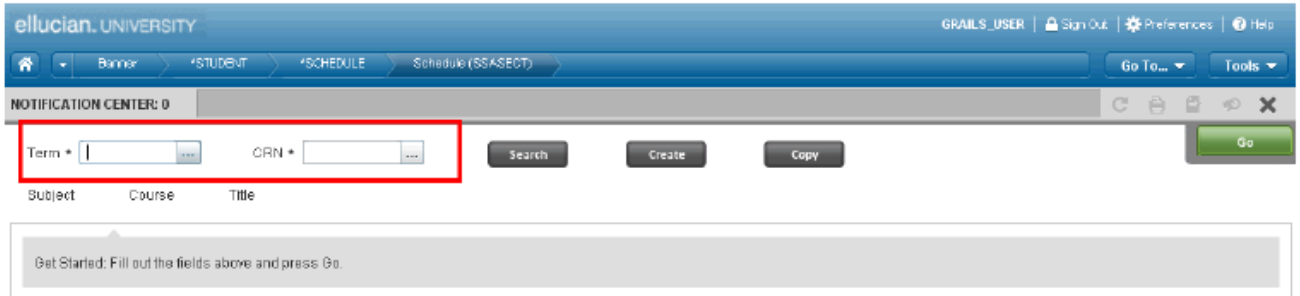
From Term: 200810 To Term: 999999 End Term | Copy Term Data

Source	Agreement Date
No Records to Display	


+ Insert

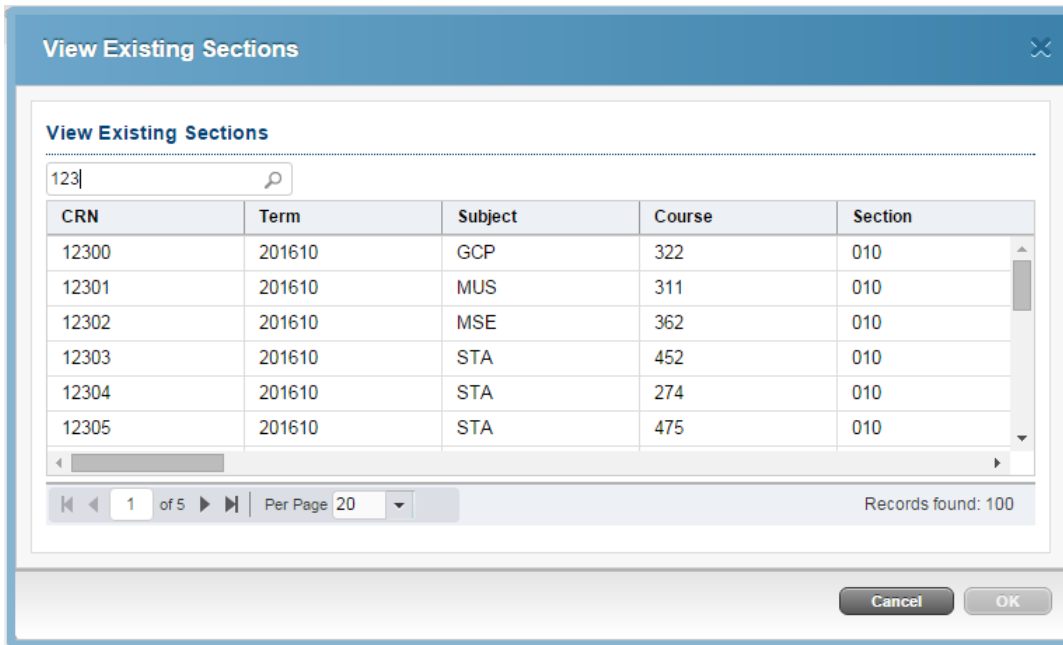
Lookups

The lookup feature allows you to quickly look up a value for a field. The  **Lookup** button next to a field indicates the field has the lookup feature.




As you enter a value in a field that has the lookup feature, a list of potential matches is displayed. You can select a value from the lookup results.

You can also click the  **Lookup** button, enter a filter value, and press Enter to display results that match the filter criteria. Select a value and click **OK**, or double-click a value to return the value to the calling page.



Filtering

You can filter data in a section if there is an active  **Filter** button next to the section name. Use the following steps to filter data in a section.

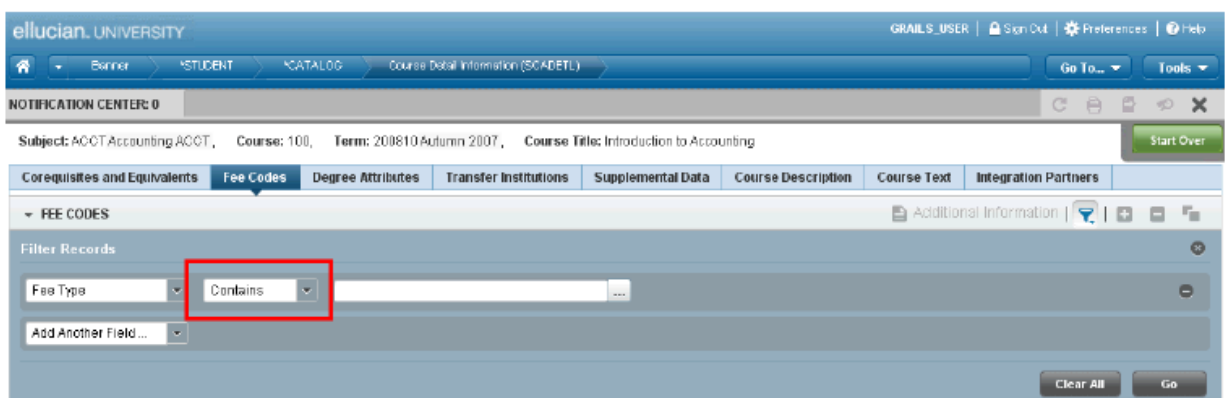
1. Click the active  **Filter** button for the section.



2. Choose the field you want to filter from the **Select a field...** drop-down list.



3. Choose an operator from the **Contains** drop-down list.

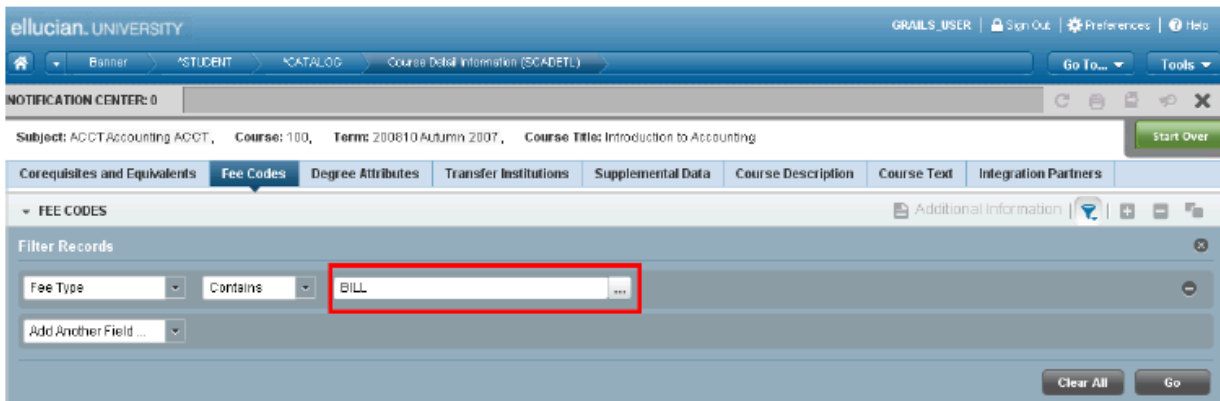


The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other). For example, the **Contains** operator is available for alphanumeric and other fields only.

The **Between** operator includes the values entered. For example, for codes “between” 1 and 5, the values 1, 2, 3, 4, and 5 are considered.

Required fields do not use the **Is Null** and **Is Not Null** operators.

4. Enter a value for the field that you selected.



5. (Optional) If you want to add another field to the filter criteria, choose a field from the **Add Another Field...** field, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.

6. (Optional) If you want to remove a filter criteria, click **Remove** next to the filter criteria.

7. (Optional) If you want to remove all filter criteria, click **Clear All**. Then re-enter the filter criteria.

8. When all filter criteria are entered, click **Go** to display the filter results.

The number of records retrieved is displayed at the top of the section.

If the results for a field can be sorted, an up or down arrow is displayed next to the field name. You can reverse the sort order by clicking the field label.

9. (Optional) If you want to perform another filter, click **Filter Again**.

10. (Optional) If you want to close the filter and display all unfiltered records, click **Display all unfiltered results**.



Note: The **Display all unfiltered results** button is not available on pages that open to the Filter Record window.