

Banner Basics: Helpful Tips & Tricks

Refer to the Office of Finance website for further explanation and instruction at:

<http://odu.edu/finance>

Contact the Banner Hotline with every Banner-related question at:

bannerhotline@odu.edu

Contact ITS with any system difficulties or password issues at:

itshelp@odu.edu OR 683 3192

For XE Navigation Assistance, check the ITS website at:

<http://odu.edu/facultystaff/university-business/banner/inb/banner-xe-forms>

- ◆ Banner organizes its data into Forms. All data is entered, maintained, edited, and queried within forms. Generally each form contains a window or Key Information Area in which you must enter your search criteria before the form will populate.
 - Forms are named by their 7-Letter Form Names:
 - ☞ The **1st letter** tells you which module the form is in (*S = Student; F = Finance; etc*)
 - ☞ The **2nd letter** is irrelevant.
 - ☞ The **3rd letter** tells you which of the 5 major categories the form is divided into, and therefore what you may do in that particular form.
 - ☞ The **final 4 letters** are a brief shortcut for the Descriptive Form Name (*SPAIDEN = Student IDENTification Form*)
 - Forms are divided into 5 major categories:
 - ☞ **A – Application Forms:** used to enter, update, and query information (*i.e.: SFASLST = Student Roster **Application** Form*)
 - ☞ **M – Maintenance Forms:** used to establish criteria crucial to processing information entered on application forms, or to look up information already entered in Banner. (*i.e.: FTMCOAS = Chart of Accounts Code **Maintenance** Form*)
 - ☞ **V – Validation Forms:** used to see values that are defined on maintenance form. (*i.e.: FTVSDAT = System Data **Validation** Form*)
 - ☞ **Q – Query Forms:** used to look up existing information, often returning to the original form – you cannot access Query forms from the main menu, rather only by linking to one via a Related Form.
 - ☞ **I – Inquiry Forms:** similar to a Query form – used to look up existing information, often returning information to the original form. You may, however, access Inquiry forms directly from the main menu. (*i.e.: FGIBDST = Organization Budget Status **Inquiry** Form*)
- ◆ CAPS is the Banner Standard! Even in student forms, CAPS is the way to go.
 - Some forms allow you to search for data with Case Insensitive searches...but generally, CAPS is actually required.
- ◆ Banner XE is more flexible than INB used to be. However, you should get used to using the numbers at the TOP of your keyboard and NOT the ones to the right.
- ◆ Remember to save your work frequently when in Banner! Banner is an internet-based system and accidents happen...Tabbed Browsing is not recommended when using Banner.
- ◆ Banner will time you out after a certain amount of inactivity (close out = 2 hours or so). It is a good idea to get into the habit of Logging Out of Banner when you are away from your computer or have finished up a particular task.
- ◆ Don't forget to click the HELP Icon in a particular form – Banner XE will explain what information that form contains!
- ◆ Always keep an eye out for scrollbars - all the data will not necessarily be in view on your computer screen, so to ensure you are capturing the complete data check for scrollbars on every Form!
- ◆ You may still use wildcards in Banner, though with the XE Interface Filter option, you no longer need to. However when using student forms, you may indeed need to use them.
 - The % may be used to take the place of multiple characters
 - The _ may be used in place of a single character
 - ☞ For example, if you are searching a Student Form for a student named Kathryn Smith, you may not know how to spell her full name. Wildcards may be combined.
 - _ATHRYN – will yield everyone named Cathryn or Kathryn
 - _ATH% - will yield everyone who has ATH as the 2nd, 3rd, and 4th characters of their first name (*i.e.: Kathy, Kathryn, Nathan, Nathaniel, etc.*)
 - KATH% - will yield everyone whose name starts with KATH (*i.e.: Kathy, Kathie, Kathryn, Katherine, etc.*)