

## Banner INB vs. Banner XE: Different Ways to do the Same Thing!











As of March 6, 2017 Banner underwent an upgrade and the user interface was updated to the Banner XE platform. The login page, basic navigation, and all Finance Forms were upgraded to this new model, but the Student Forms remain in the INB interface until a later date (conversion for Student Forms likely will occur in October, 2017). When a user is logged into Banner XE, they will easily be able to go between the XE and the INB interfaces depending on the form they need to work with. That being said, it is important to know and understand the navigation tools in the INB interface, though these will only be used for a temporary amount of time and only if you end up working in a Student Form within Banner XE. As always, any questions you may have relating to Banner, please contact the Banner Hotline at [bannerhotline@odu.edu](mailto:bannerhotline@odu.edu).

### **Banner INB Home Screen:**

The screenshot shows the Banner INB Home Screen interface. At the top, there is a menu bar with options: File, Edit, Options, Block, Item, Record, Query, Tools, Help. Below this is a toolbar with various icons. A callout box labeled "Pull Down Menu Bar" points to the menu bar. Another callout box labeled "X Icon" points to a red 'X' icon in the toolbar. The main content area is divided into several sections. On the left, there is a "Go To..." dropdown menu with a callout box labeled "Go To Block". Below this is a tree view of "My Banner" with sub-items: Student [\*STUDENT], Finance System Menu [\*FINANCE], Human Resources [\*HRS], Financial Aid [\*RESOURCE], and General [\*GENERAL]. A callout box labeled "Icon Menu Bar" points to the tree view. Below the tree view is a callout box labeled "My Banner Personal Menu". On the right, there is a "Products:" dropdown menu and a "My Links" section with links: Check Banner Messages, Personal Link 1, Personal Link 2, Personal Link 3, Personal Link 4, Personal Link 5, and Personal Link 6. Below the links is a "My Institution" section with a purple banner for "ellucian.". At the bottom, there is a "Banner Broadcast Messages" section. A callout box labeled "Auto Hint/Status Bar (tells you your next step, lists any errors, etc.)" points to a status bar at the bottom of the screen. The status bar contains the text "Enter the object name; Press LIST for listing." and "Total # Records listed here". Below the status bar, there is a "Record: 1/1" and a "<OSC>" button.

### **HELPFUL TIPS & TRICKS:**

- ☞ There are many ways to perform one action in Banner. Whether you prefer menu icons, drop-down menu options, or keyboard shortcuts, each will perform the same task within Banner Forms.
- ☞ Caps Lock is required when completing a search in nearly any form within Banner! CAPS is the standard!
- ☞ Banner INB is a bit more restrictive when it comes to navigation, search criteria requirements, etc. When searching for a form, you MUST enter the 7-Letter Form Name in the Go-To Field or perform an Object Search by clicking the Details Icon and searching for the form.

Icon or Menu Item Name	Icon Image, Menu Item, or Keyboard Shortcut	Banner XE Alternative	Function
Go To Block	Go To... <input type="text"/>	Search Block <u>OR</u> Form Search Button	Allows you to search for Student Forms within Banner. <b>You MUST enter the 7-Letter Form Name in this field!</b>
Details Icon		Filter Menu Button <u>OR</u> Tools > View Status Indicators	Allows you to perform an object search for a selected Key Informational Area field or takes you to a corresponding form that lists a key for the selected search field.
Save Icon		Save Button	Saves your work on the current form.
Rollback Icon		Start Over Button <u>OR</u> Tools > Refresh Option <u>OR</u> Tools > Clear Record	Takes you back to the key information area so you may conduct a new search with new search criteria in the displayed form.
Previous/Next Record Icons		Up/Down Arrows on Keyboard <u>OR</u> Scroll Bar on screen	Takes you to the next/previous line item ( <i>read: record</i> ) within a form.
Record Pull Down Menu	<u>Record</u>		
Previous/Next Block Icons		Go Button <u>OR</u> Next/Former Block Arrows on bottom left side of form <u>OR</u> Alt+Page Down	Takes you to the next information block within a form. Most Student Blocks require this action after entering in your search criteria in the Key Informational Area before the info will populate.
Block Pull Down Menu	<u>Block</u>		
<b>KEYBOARD SHORTCUT</b>	Ctrl + Page Down		
Enter, Execute, or Cancel Query Icons		Filter Button <u>OR</u> F7 & F8	This allows you to perform a query search in a particular form. You must first start the query and then execute once you enter in your query criteria.
Query Pull Down Menu	<u>Query</u>		
<b>KEYBOARD SHORTCUTS</b>	F7 to start F8 to Execute		
Print Icon		Tools > Print	Allows you to print ONLY what is viewable on your screen...NOT the entire document/data!
BDM – Display Document Icon		Retrieve Button <u>OR</u> Tools > Retrieve Documents	If applicable, allows you to view any scanned documents that correspond to the record you are viewing. <i>NOT generally in use for Student Forms!</i>
BDM – Add Document Icon		NA	Used to add securely scanned documents into Banner to attach to a specific record. Not in use by most Banner Users!
X Icon		ODU Home Screen Button <u>OR</u> X Button	Takes you back to the My Banner Homepage <u>OR</u> to the form you were previously viewing.
Options Pull Down Menu	<u>Options</u>	Related Menu Button	Provides a direct link to other relevant forms that you may link to from the current form you are viewing in Banner. Therefore allows you to conduct further research.
Help Pull Down Menu ( <i>Downloading to Excel</i> )	<u>Help</u>	Tools > Export	Within the <b>Help</b> Menu, you may select <i>Extract Data With Key</i> for certain forms in order to export the data into an Excel Spreadsheet.