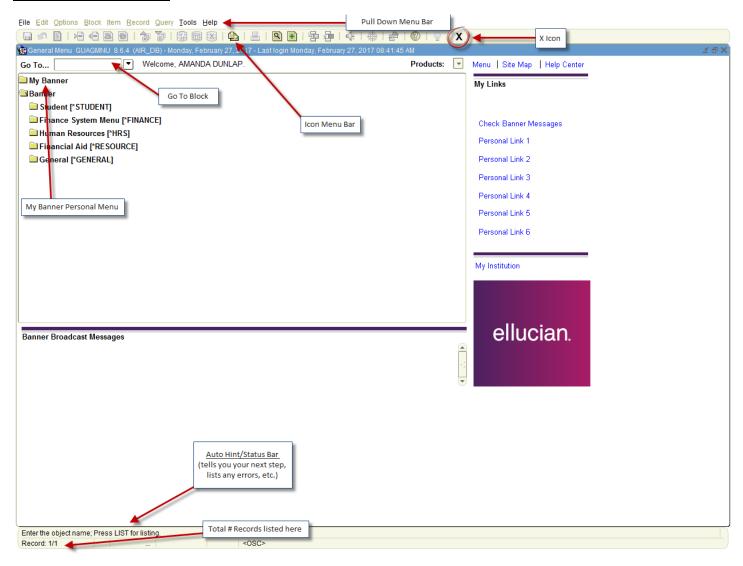
Banner INB vs. Banner XE: Different Ways to do the Same Thing!

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.

Banner INB Home Screen:



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 | <u>Function</u> |
|--|---|---|--|
| Go To Block | Go To | Search Block <u>OR</u> Form Search Button | Allows you to search for Student Forms within Banner. You MUST enter the 7-Letter Form Name in this field! |
| 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:</i> record) within a form. |
| Record Pull Down Menu | Record | | |
| Previous/Next Block Icons | | Go Button OR Next/Former Block Arrows on bottom left side of form OR 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 | Block | | |
| KEYBOARD SHORTCUT | 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 | Query | | |
| KEYBOARD SHORTCUTS | F7 to start F8 to Execute | | |
| Print Icon | | Tools > Print | Allows you to print ONLY what is viewable on your screenNOT 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. NOT generally in use for Student Forms! |
| 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 | X | ODU Home Screen Button OR X Button | Takes you back to the My Banner Homepage <u>OR</u> to the form you were previously viewing. |
| Options Pull Down Menu | Options | 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 (Downloading to Excel) | <u>H</u> elp | Tools > Export | Within the Help Menu, you may select <i>Extract</i> Data With Key for certain forms in order to export the data into an Excel Spreadsheet. |