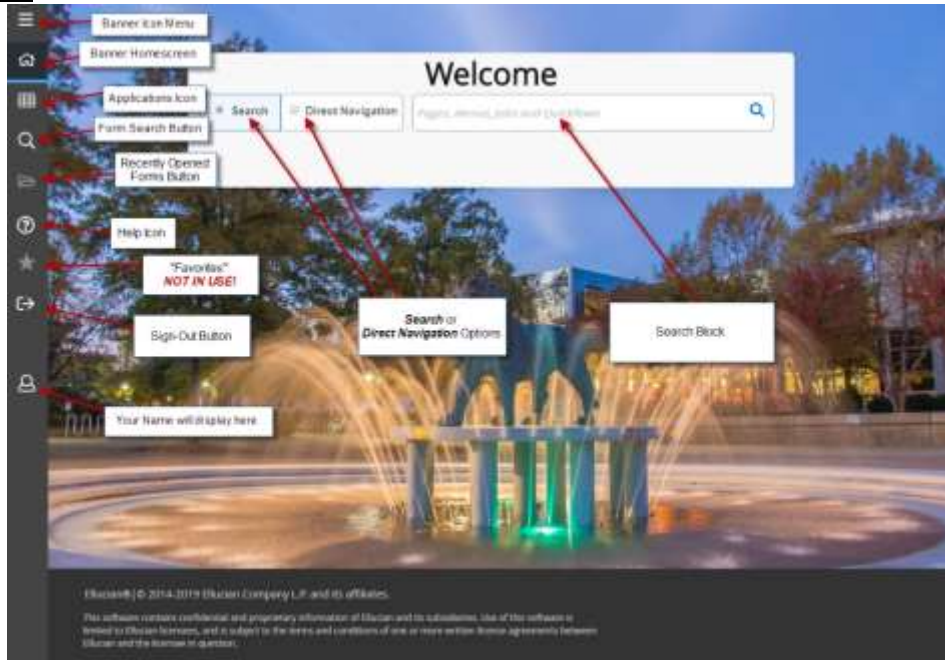# Basic Banner Navigation

Below is a screenshot of the Banner XE Home Screen, as well as a "cheat-sheet" of sorts to provide a thorough reference guide for navigating through Banner. As always contact the Banner Hotline with any banner-related questions at bannerhotline@odu.edu.

Banner XE Homepage:
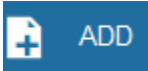
Button Name	Button Image	Function
Banner Icon Key Menu		Pulls up the icon menu list – icon specifics noted below. This is available on every form you view within Banner XE.
Applications Icon		Allows you to search through Banner and also view your **My Banner** personal menu.
Form Search Button		Allows you to **search** for a particular form by either Descriptive Name or 7-Letter Form Name.
Recently Opened Forms Button		***ONLY shows up after you have searched for your first form.*** This allows you to see and select forms you have viewed during your login session.
Old Dominion University Home Icon		Acts as a "*Home*" button – may be selected anytime to return to the **Banner Home Screen**.
Sign Out Button		Allows you to **sign out** of Banner.
Search Block		Located in the center of the Home Screen page, this block allows you to **search** for a particular form by either Descriptive or 7-Letter Form Name.
Keyboard Shortcuts Key		By clicking on this button, you will be shown the **Keyboard Shortcuts** which may be used on any Form in Banner.
Help Button		***ONLY shows up on particular forms***, but will allow for **further explanation** of the form you are viewing and its contents when not grayed out.

Keyboard Shortcuts:

Keyboard Shortcuts	✕
Display Applications	CTRL+M
Display Recently Opened	CTRL+Y
Display Dashboard	CTRL+SHIFT+X
Help	CTRL+SHIFT+L
Search	CTRL+SHIFT+Y
Sign Out	CTRL+SHIFT+F

Upon entering into a **Form** within Banner, there are more **menu** and **button** options to help you further navigate. For further explanation, see the table below.

Button Name	Button Image	Function
X Button	✕	This will take you back either to a previously viewed form or to the ODU Home Screen if there is no previously viewed form. You may also select the Old Dominion University "Home Screen" Button referenced above.
GO Button	Go	After entering in search criteria in the Key Informational Area at the top of the screen, this allows you to proceed with your search on a particular form. Also will allow you to proceed to next areas of information within a Form (like "Next Block").
Tools Menu Button	⚙ TOOLS	Allows you to manipulate, print, export, etc. the contents of a particular form. These Tool items may change depending on the form you are viewing. Please Note: the Tools Menu and its contents will be further explained in the table below.
Error Message Notification Window	1	Like an Auto Hint and Status Par – notifies you of the status of your search, any tips and tricks, or any errors that may be present. To get the message to go away, simply click on this Notification Window Button and the message will minimize.
Related Menu Button	RELATED	This menu allows you to link to other forms that may be relevant to the form you are currently viewing – by clicking on the Related tab and selecting a form from the provided list, you will proceed to that new form and may be able to do further research.
Add Menu Button	ADD	Most users to not use this feature – only used by individuals responsible for processing BDM Documents.
Retrieve Menu Button	RETRIEVE	Used to view Banner Document Management files attached to particular line items in Finance Forms. ONLY available for those who have BDM installed and setup on their personal computers!
Next Record or Block/Former Record or Block Buttons	⤒ ⤓	Allows you to proceed to a Previous or Former Screen, Data Block, or Record.
Start Over Button	Start Over	Allows you to roll back to the Key Information Area in a form to input new data and start a new search with new search criteria.

Upon selecting the **Tools Menu Button**, there are further menu item options you may select to help you navigate through forms. For further explanation, see the table below.

Button Name	Button Image	Function
Search Block	Search	You may use this block to search for a function housed within the Tools menu (i.e.: Print, Export, etc.).
Refresh	Refresh F5	Acts the same as the Start Over button listed above. Will take you back to the Key Information Area to input new search criteria within the same form and perform a new search.
Export	Export Shift+F1	Allows you to export the data in the Banner Form to an Excel Spreadsheet. NOTE: You MUST setup your user preferences in XE properly before being able to download! *See Banner Finance training page!*
Print	Print Ctrl+P	Allows you to print a **SCREENSHOT** of what is viewable on your computer screen for various Banner XE Forms. Remember – this is NOT the same as ePrint, and will NOT print the total data within a form!
Clear Record	Clear Record Shift+F4	Will clear the selected record
Clear Data	Clear Data Shift+F5	Will clear the selected data, but leaves total.
Item Properties	Item Properties	Provides a brief description of the Document Type Properties (not used frequently)
Retrieve Document	Retrieve Documents Alt+R	Used to view Banner Document Management files attached to particular line items in Finance Forms. ONLY available for those who have BDM installed and setup on their personal computers! Similar to **RETRIEVE Menu Button** listed above.
Add Documents	Add Documents >	Used by departments with scanning/Document Management capabilities – allows users with appropriate access to add an attached document to a record within Banner XE through BDM.
View Status Indicators	View Status Indicators	**ONLY VIEWALBE ON SOME FORMS** – allows you to view the key for codes within a particular form in Banner *(i.e.: In FOIDOCH, the Status Indicators tell you whether an invoice was paid, approved, voided, etc.)*
About Banner	About Banner	Provides an update on the current version, Release, and Release Date for the particular form you are viewing within Banner XE.

HELPFUL TIPS & TRICKS:

☞ You will also notice keyboard shortcuts (*i.e.: F5, Ctrl-P, etc.*) listed next to some **Tool** menu items. You may use these keyboard shortcuts in place of the relevant Tool menu items when working within Banner Forms.

☞ The **Tool** menu items may change depending on the form you are viewing and/or working in, however those mentioned in the table above are seen within most forms.

☞ A reference video is available online for Basic Navigation and Features: http://odu.edu/facultystaff/university-business/banner/inb/banner-xe-forms

Sample Form Screenshot:

X Button
(takes you back to the previous)

Tools Menu Button
(allows you to manipulate, print, export, etc. the contents of the form)

Key Information Area
(where you type in your search criteria within a form)

DO NOT USE!

DO NOT USE!

Go Button
(allows you to populate the search based on your criteria)

Related Menu Button
(allows you to link to other relevant forms)

Root Path Indicator
(shows you which form you are on or linked to)

Next/Former Record or Block Button
(allows you to proceed to new or former area on form)

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.

Sample Tool Menu Screenshot: