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 **IDEN**tification Form)*
  ➢ Forms are divided into 5 major categories:
    ☞ **A – Application Forms:** used to enter, update, and query information *(i.e.: SF**A**SLST = 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.: FT**M**COAS = Chart of Accounts Code **Maintenance** Form)*
    ☞ **V – Validation Forms:** used to see values that are defined on maintenance form. *(i.e.: FT**V**SDAT = 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.: FG**I**BDST = 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 that 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 date 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.)

Banner Basics: How to Log Into Banner

Banner XE is a web-based system which requires an active internet connection. Below will offer step-by-step instructions for how to log in and out of Banner. And as always, contact the Banner Hotline with any banner-related questions at bannerhotline@odu.edu.

Helpful Tip: If you have trouble with your MIDAS credentials, contact **ITS** at 683.3192 or itshelp@odu.edu.

Head to https://banner.odu.edu to log in. You will be directed to the page on the left below (*ITS – Banner XE Forms Page*). **Click Banner XE Login** and you will then be redirected to the MIDAS Login page on the right below. Enter you MIDAS Credentials and click **Login**.

Welcome to Banner!

You are now free to utilize the many forms within Banner (at least the ones you have been granted access to view). You are now ready to navigate through Banner! See handout entitled: **Basic Banner Navigation** for more tips and further instruction. *If this is your first time logging in, review next step!*

*If this is your first time logging into Banner, you will notice a **Response Window** pop-up upon entering your MIDAS Credentials and clicking Login. This is ODU's Privacy Policy. Please read this thoroughly, as the information contained within Banner is SECURE and should remain confidential at all times. It may only be used for purposes related to your daily job requirements. Before being granted access to Banner for the first time, you must click **I Agree**. You will then be redirected to the **Old Dominion University Banner Home Screen**.

Helpful Tips: Remember, you will only see this Response Window upon entering into Banner for the **FIRST TIME**.
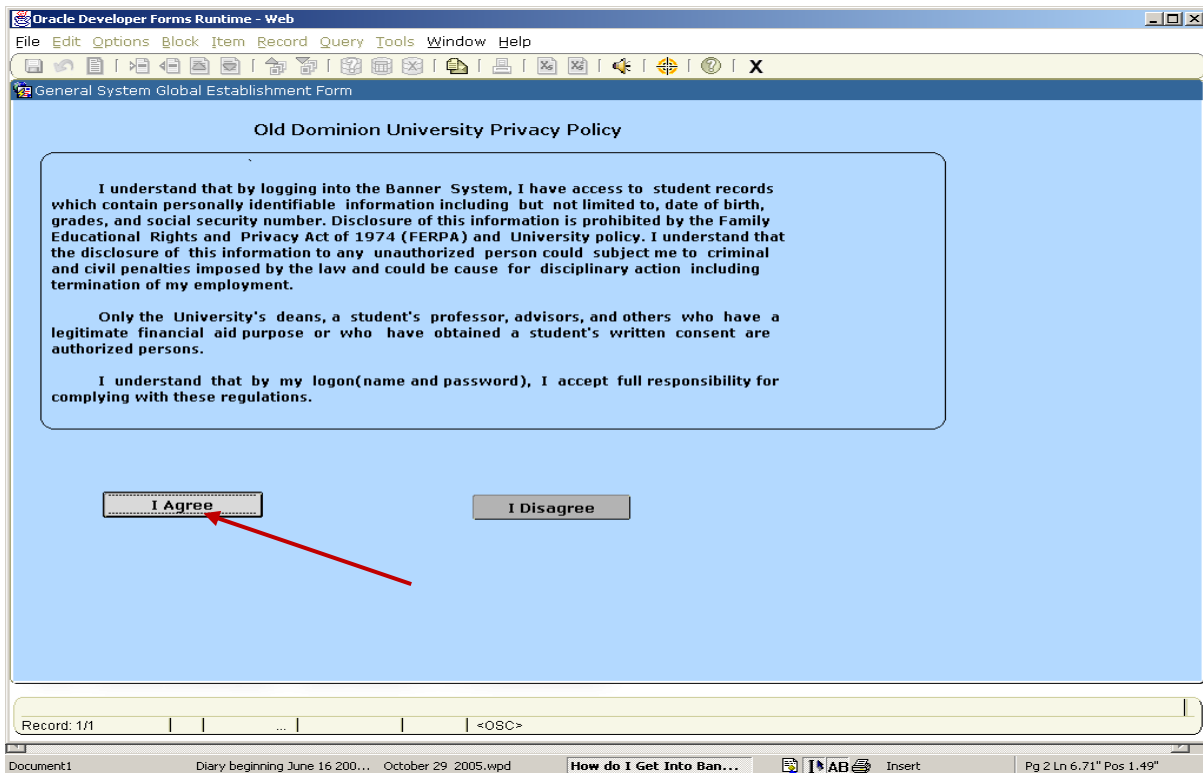
HELPFUL TIPS & TRICKS:

☞ To log out of Banner, simply select the SIGN OUT Button in the top right corner of the screen and close the internet page.

Have problems with your MIDAS Credentials or your Password?

ITS can help! Email: itshelp@odu.edu

- Phone: 683 3129
- Website: https://midas.odu.edu/Help

Have questions about Banner Functions? **The Banner Hotline can help!**

Please send all Banner-related questions to the hotline.

- Email: bannerhotline@odu.edu

For more information on Banner-specific trainings, head to the Office of Finance Website and Banner Training Page:
http://odu.edu/facultystaff/training-development/banner-training

Searching for Forms

In Banner INB, we categorized and search for forms by their 7-letter Form Name. We are now able to search for the forms for both the Student and the Finance modules by their descriptive name as well. Below will explain the step-by-step instructions of how to do so in the XE Interface. The latter half of this handout will provide further instruction on how to navigate the INB interface for the student forms module. See the steps below, and as always contact the Banner Hotline with any banner-related questions at bannerhotline@odu.edu.

◈ From the Banner XE Homepage, type your search criteria into the search block in the middle of the screen.
   ➢ You may search for forms by Key Word, Descriptive Title of the Form, or the 7-Letter Form Name.

HELPFUL TIPS & TRICKS: You may also use the magnifying glass *Search Button* in the top left-side of the screen to search for forms! The same search criteria may be used as mentioned above.

Search Button	🔍	
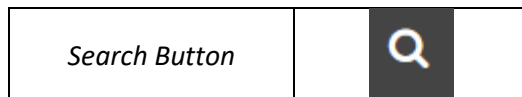
◈ Once you begin your search, a menu list will pop up below the Search Block with all forms that meet your search criteria. Simply select the appropriate form from the menu and you will be redirected to that form.

HELPFUL TIPS & TRICKS:
☞ It is not necessary to search for these forms in **ALL CAPS**, though CAPS is the standard in Banner.
☞ You may also press ENTER to proceed to the form.

◈ Upon completing your work within your originally selected form, simply click the *Home* Icon at the top of the screen to be redirected to the home screen so you may search for another form.

Old Dominion University Home Icon:	
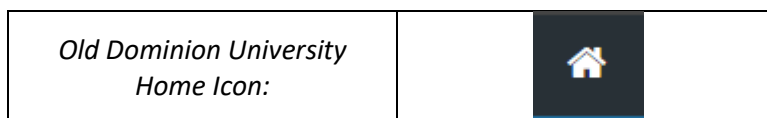
Basic Banner Navigation

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:
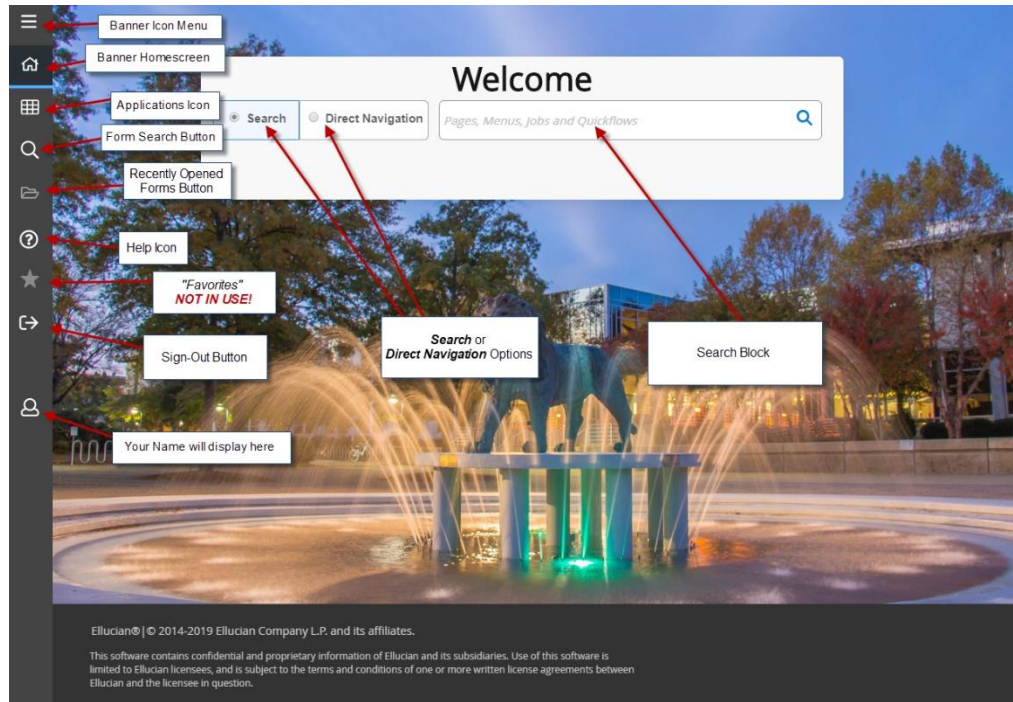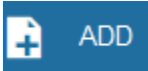
Button Name	Button Image	Function
Banner Icon Key Menu		Pulls up the icon menu list – icon specifics noted below. This is available on every form you view within Banner XE.
Applications Icon		Allows you to search through Banner and also view your **My Banner** personal menu.
Form Search Button		Allows 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.
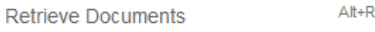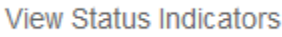
Keyboard Shortcuts:

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)

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

Tools Menu Button
(allows you to manipulate, print, export, etc. the contents of the 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)
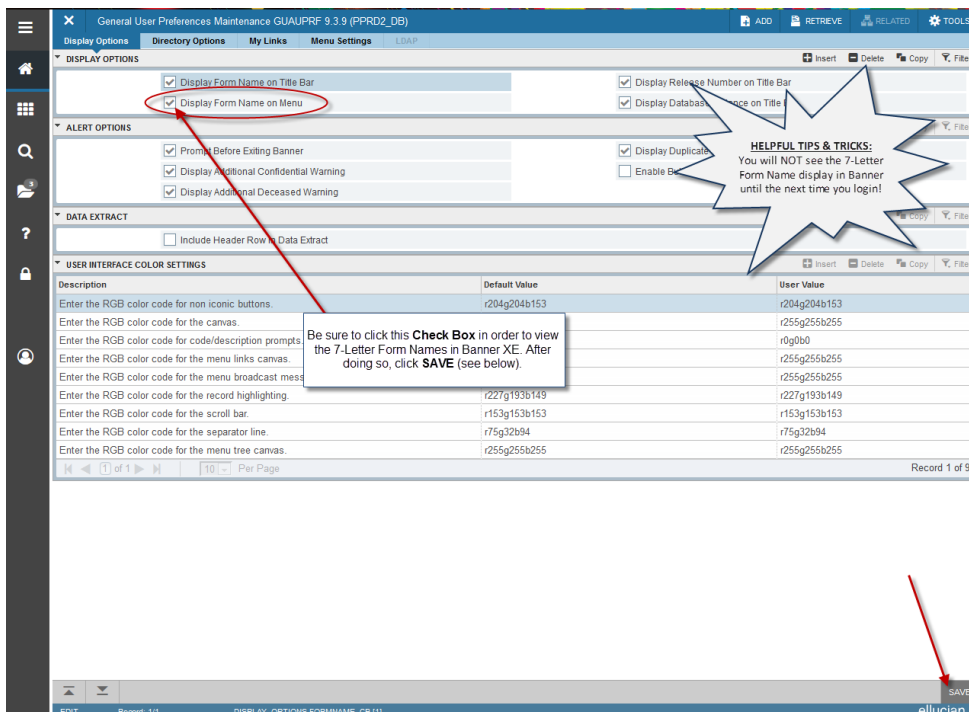
Sample Tool Menu Screenshot:

Displaying the 7-Letter Form Name

In Banner INB, we categorized forms by a 7-letter Form Name. It is good practice to display those 7-Letter Form Names throughout Banner, but you must adjust your User Preferences before you may do so. Below will explain the step-by-step instructions of how to do so. As always contact the Banner Hotline with any banner-related questions at bannerhotline@odu.edu.

◈ From the Old Dominion Home Screen in Banner XE, search for the **General User Preferences Maintenance [GUAUPRF] Form**. Proceed into the Form.
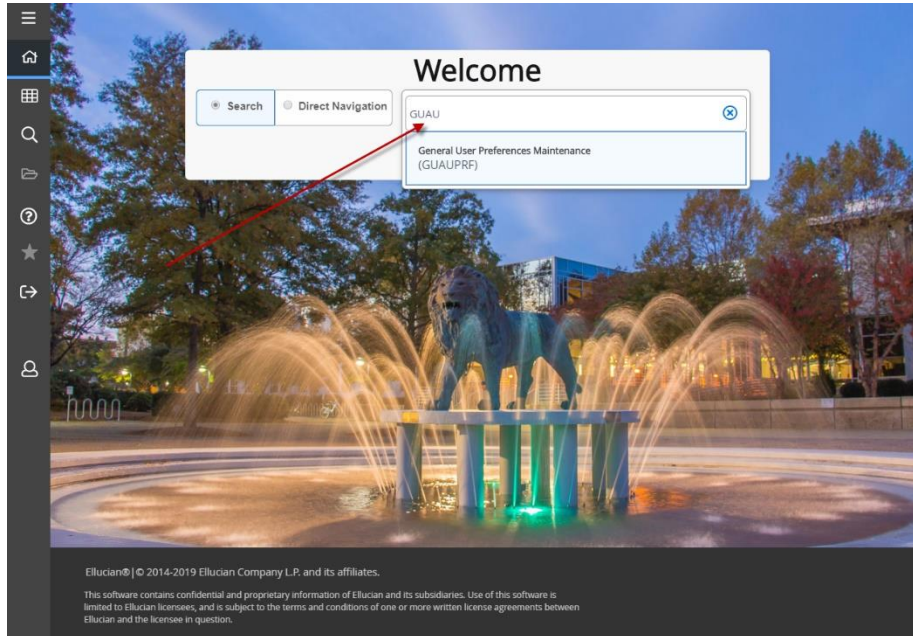
◈ After arriving at the **General User Preferences Maintenance [GUAUPRF] Form**, click and select the ***Display Form Name on Menu*** checkbox and click **SAVE**. You're done! ☺

HELPFUL TIPS & TRICKS:

☞ You will NOT be able to see the 7-Letter Form Name display in Banner until then next time you login!

_____

Creating a Personal Menu in Banner

Banner has many useful tools to allow navigation to become as easy as possible. One of these tools is the My Banner Personal Menu, which is a personalized menu containing forms which you use most frequently. You may add or delete forms for your Personal Menu anytime. As always contact the Banner Hotline with any banner-related questions at bannerhotline@odu.edu.

In the Search Block on the ODU Home Screen, type "My Banner Maintenance [GUAPMNU]" and hit Enter.
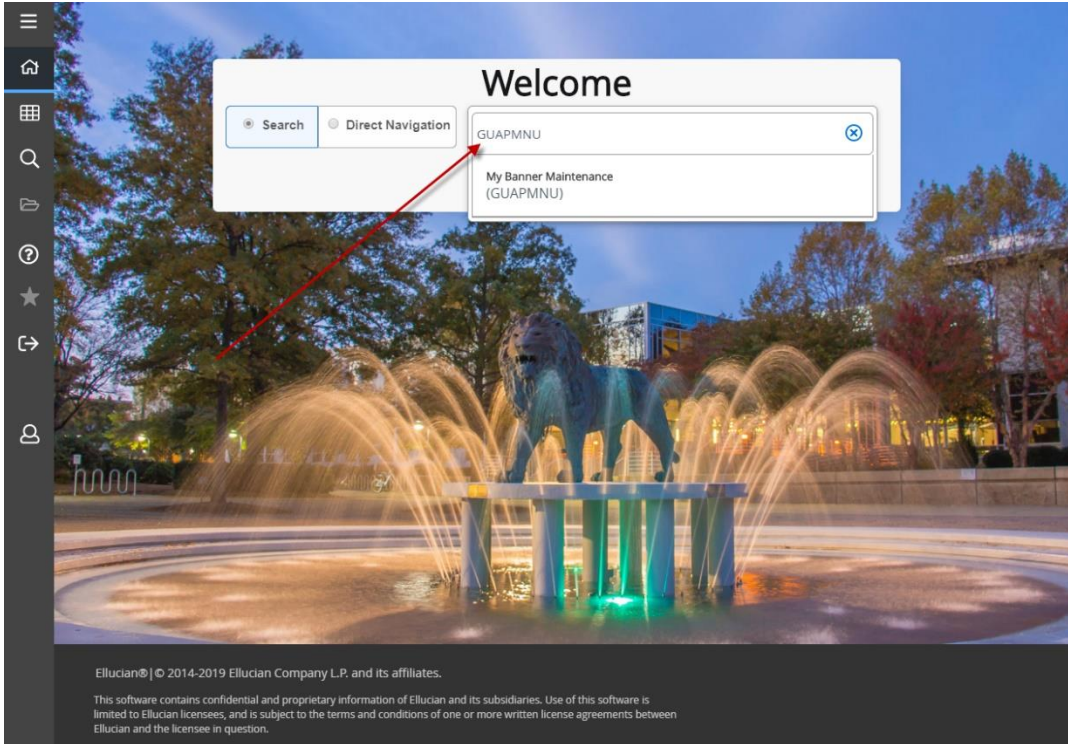
You will then be redirected to the **GUAPMNU** Form where you may add (or delete) forms you use most frequently to your Personal Menu:
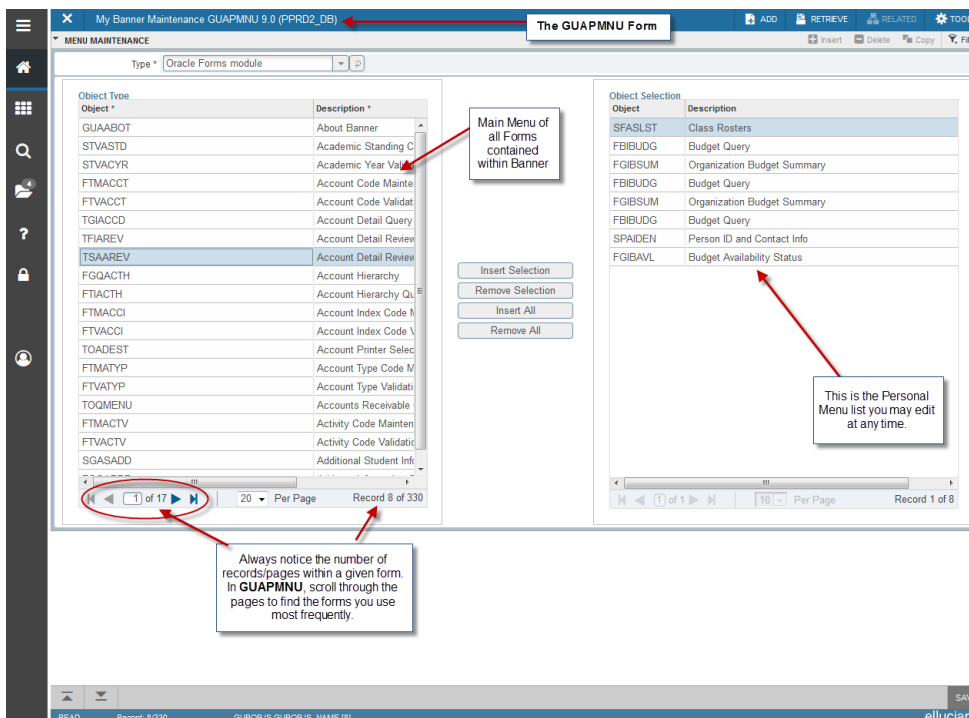
To add a form to your Personal Menu, locate the form on the list and double-click it. The select the **Insert Selection** button to add it to your Personal Menu.

<mark>Hit the **SAVE** Button at the bottom left of the screen and return to the ODU Home Screen to view your Personal Menu.</mark>

HELPFUL TIPS & TRICKS: You may highlight any item in the *Object Type box* and then click the **Filter** Button to search for forms by *Object* or *Description*.

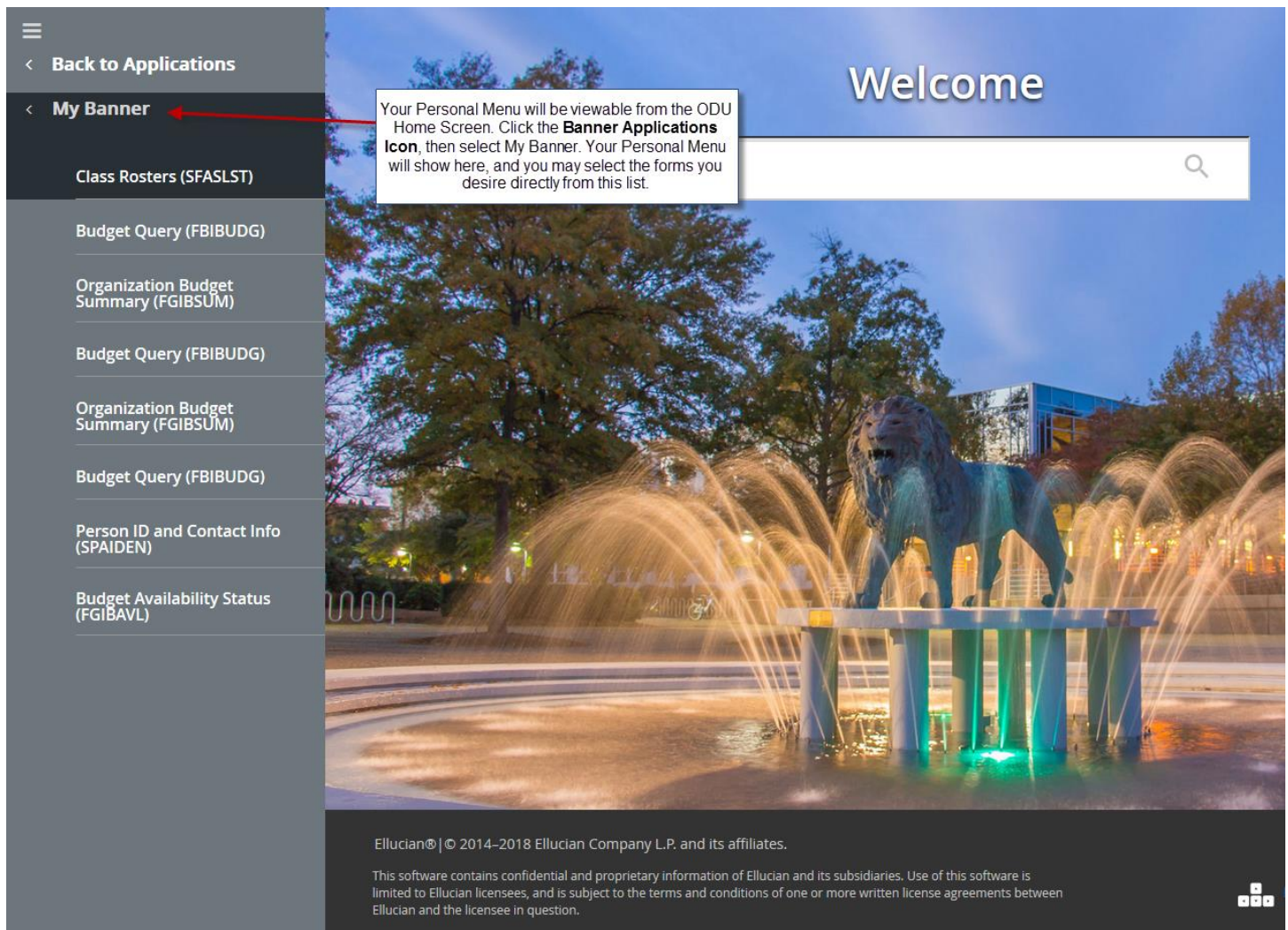To begin the query, click the **GO Button** or press **F8**.

If you would like to delete a form from your Personal Menu, double-click that form in the *Object Selection* list and then click **Remove Selection**.

<mark>Hit the **SAVE** Button at the bottom left of the screen and return to the ODU Home Screen to view your Personal Menu.</mark>

Your Personal Menu will appear on the ODU Home Screen. Click the **Banner Applications Icon** and then select My Banner. Your list will be viewable, and you may click a form from this list and be redirected automatically.

Banner Applications Icon	⊞	Allows you to search through Banner and also view your **My Banner** personal menu.

HELPFUL TIPS & TRICKS:

☞ Only use the **Insert Selection** and **Remove Selection** buttons on the GUAPMNU Form. ***NEVER*** use the Insert All Menu Button because you will freeze yourself out of Banner. The **Remove All** button should only be used if you highlight the items in your Personal Menu (*Object Selection field*) and wish to remove every item.

☞ You MUST save your work! After you have completed your personal menu, always click the SAVE Button. You will receive a pop-up green message that reads, "Your work has successfully been saved!" – only after doing so should you X out of the Form and return to the ODU Home Screen.

☞ ***You will NOT see any updates to your Personal Menu after completing the steps listed above. Any changes to your personal menu will not be viewable until the next time you log into Banner and henceforth!***

Banner FAQs

What is Banner?

◈ Banner is an internet-based Administrative System used by many universities to help manage many different aspects of secure university information, to include student information, financial reporting and budget information, staff and faculty records, etc.

Why do we use it?

◈ Banner is the ODU's centralized academic and administrative records system. It is used at ODU to disseminate relevant information to various departments who are in need while remaining secure and maintaining confidentially. We have strict standards for use, and access is only granted to those individuals for whom their job requires access to view, input, and/or edit Banner data. Those individuals will receive access to the forms necessary to perform their job functions.

What kinds of things can I access with Banner?

◈ You are only able to see forms that are relevant to your department and daily job requirements. You will generally not have unlimited access to view all of the forms within Banner.

Who grants access to Banner?

◈ You may request Banner access through the Universal Account Request Form, found on the ITS website: https://www.odu.edu/ts/access/monarchkey/online-account

◈ There are different levels of Banner access, some of which you will not be granted access to. Your Budget Unit Director must approve your request to gain access to these forms. More information may be found below:
➢ Banner Finance access: https://www.odu.edu/facultystaff/university-business/banner/finance
➢ Banner Financial Aid access: https://www.odu.edu/facultystaff/university-business/banner/financialaid
➢ General Student Banner access: https://www.odu.edu/facultystaff/university-business/banner/student

How do I log into Banner from my computer in my office?

◈ Head to banner.odu.edu and enter your Midas ID and password to log into Banner. For further step-by-step explanation, consult the handout located on the Office of Finance website Banner Basics Training page: http://odu.edu/facultystaff/training-development/banner-training/basics

Can I access Banner off-campus? If so, how?

◈ You must have VPN Service to access Banner outside of ODU's network, and you also must have the latest version of Java installed on your computer. For more information, contact ITS at: itshelp@odu.edu

What internet browser should I use to access Banner?

◈ Banner works with Internet Explorer, Mozilla Firefox, Chrome, and Safari!

Will Banner work on my iPad?

◈ Now that we have upgraded to Banner XE, the interface will indeed work with you iPad! Contact ITS for assistance.

Who do I contact if my Midas ID and password do not seem to work?

◈ You will contact Information Technology Services (ITS)…NOT me! ☺ Call them at 683-3192 or email them at itshelp@odu.edu

Will I be able to see all of the forms I learn about in training today when I log onto my personal account?

◈ NO! You will only be able to view forms relevant to your daily job requirements via Banner.

Where should I direct all of my Banner-related questions?

◈ The Banner Hotline, of course! Email bannerhotline@odu.edu, and you will receive a response within 2 business days.

Where should I look for information about Banner before I contact the Banner Hotline?

◈ The Office of Finance website is full of information. Most specifically, head to the Banner Training page and consult the many handouts available to try and work through your question.

Should I log out of Banner each time I am done using it, or can I simply close out of the internet browse?

◈ You should ALWAYS properly log out of Banner when you are finished with a session. Logging out of a web-authenticated services is not guaranteed until you properly exit the browser window. To log out, please ensure your browser is fully closed!