







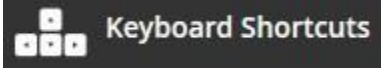
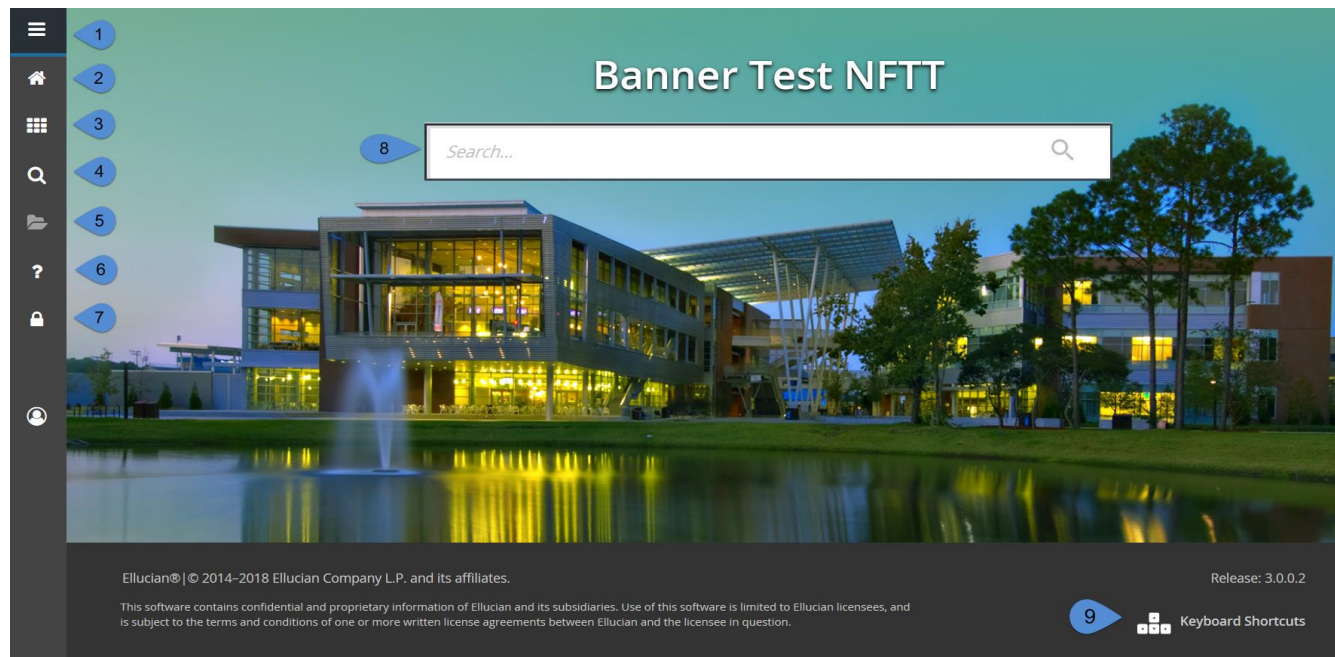


BAP NAVIGATION CHEAT SHEET

Below is a screenshot of the Banner 9 Home Screen provided as a “cheat-sheet” for navigating through Banner. Contact Banner-Finance@unf.edu with any banner-related questions or issues.









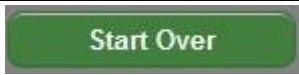
<u>Button Name</u>	<u>Button Image</u>	<u>Function</u>
Main (Toggle) Menu		Pulls up the icon menu list – icon specifics noted below. This is available on every form you view within Banner 9.
Home (Dashboard) Icon		Acts as a “Home” button – may be selected anytime to return to the Banner Home Screen .
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.
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.
Sign Out Button		Allows you to sign out of Banner.
Form 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.



Keyboard Shortcuts:










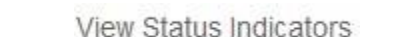

Keyboard Shortcuts	
Display Applications	CTRL+M
Display Recently Opened	CTRL+Y
Display Dashboard	CTRL+SHIFT+X
Help	CTRL+SHIFT+L
Search	CTRL+SHIFT+Y
Sign Out	CTRL+SHIFT+F

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.

<u>Button Name</u>	<u>Button Image</u>	<u>Function</u>
X Button		This will take you back either to a previously viewed form or to the Home Screen if there is no previously viewed form. You may also select the "Home Screen" Button referenced above.
GO Button		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		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		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		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		Most users do not use this feature – only used by individuals responsible for processing BDM Documents.
Retrieve Menu Button		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		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.

BAP NAVIGATION CHEAT SHEET

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		You may use this block to search for a function housed within the Tools menu (i.e.: Print, Export, etc.).
Refresh		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		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!
Print		Allows you to print a SCREENSHOT of what is viewable on your computer screen for various Banner XE Forms. This is NOT the same as ePrints, and will NOT print the total data within a form!
Clear Record		Will clear the selected record
Clear Data		Will clear the selected data, but leaves total.
Item Properties		Provides a brief description of the Document Type Properties (not used frequently)
Retrieve Document		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		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		ONLY VIEWABLE ON SOME FORMS – allows you to view the key for codes within a particular form in Banner (<i>In FOIDOCH, the Status Indicators tell you whether an invoice was paid, approved, voided, etc.</i>)
About Banner		Provides an update on the current version, Release, and Release Date for the particular form you are viewing within Banner XE.

VALID BANNER 9 DATE FORMATS

If You Enter...	It will translate as...
062018	06/20/2018
06202018	06/20/2018
Any char A-Z	Today's Date
06/20/2018	06/20/2018