

Ellucian Banner Admin Navigation: Tips and Tricks



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- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

Introduction

- There are many cool new user experience improvements in Banner 9
- Let's discover (or rediscover) navigating Banner

Top 7 Usability Improvements

1

Navigation Improvements

2

**Modernized user interface
with Industry Standard
Web Controls**

3

Consistency

4

System Messaging

5

Multiple record views

6

Lookups and Filter

7

Tablet Friendly

Agenda

1 Top Favorite Feature

8 Queries

2 Application Navigator and the Main Menu

9 Shortcut Keys

3 Terminology and Parts of a Page

10 Multi-lingual support

4 Notification Center and Help

11 Job Submission

5 Name Search

12 Name Display

6 Other Tidbits

13 Tips for Adoption of Banner 9

7 Data Export

Top Favorite Features

- **How to make Banner BIGGER**

Ctrl = increase zoom (essentially ctrl with +)

Ctrl – decrease zoom

Ctrl 0 reset zoom to 100%

- **For PC: Use F11 to hide Web Browser Tabs and Address Bar to get more space**
- **These are all web shortcuts (not new Banner shortcuts) but because Banner 9 is not on Oracle forms, these shortcuts actually work now.**

Application Navigator

User: [REDACTED] Logout



Menu Toggle – Displays Icon Names

- The Welcome Screen: 4 ways to navigate



Home Search box: searches page names and descriptions = Ctrl + Shift + X



Applications Icon: basically the main menu Ctrl + M



Search Icon: kind of like having “Go To box”. Ctrl + Shift + Y



Recently Opened Icon: Now includes all objects opened.
Like the Go To box list of forms. Ctrl + Y



Navigator Help = Ctrl + Shift + L

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Navigator Sign Out = Ctrl+Shift+F



*Who the logged in user is



Change MEP entity icon Ctrl+Shift+C

Release: 1.3.1

LIVE

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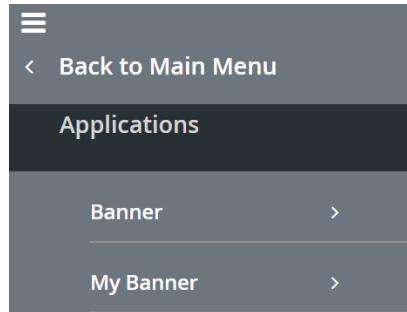
Application Navigator



`{{'menuTooltip'|i18n}} ({{'menuShortcut'|i18n|uppercase}})`

- **Ctrl+F5**
- **If Application Navigator loads but the navigation buttons don't function and the search box won't show, use Ctrl+F5 to “clear cache” and it should load successfully.**
- **If you get the “circle of death”**

My Banner



- **GUAPMNU: Populate My Banner**

When using GUAPMNU, you can “rename” objects and they are unique to the My Banner setup. This does not rename objects in the system

- **GUAOBJS/GUTGMNU: Create Subfolders**

You can create subfolders in My Banner by adding a folder object to GUAOBJS and then referencing the fold in the My Banner form

Recommend creating folders labeled by office or user with a one up (*REGOFF1, *REGOFF2, *REGOFF3, etc)

You can use GUTGMNU to edit what objects belong in subfolders

- **GUTPMNU: Copy My Banner to another User**

You can copy a My Banner folder from one user to another using GUTPMNU

This is an excellent “trick” to help new hires become more quickly acclimated to Banner

Terminology

- **Forms = Pages**
- **From Key Block; Next Block = Go**
- **Blocks become Sections**

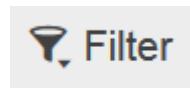
Alt Page Down and

Bottom left icons



Alt Page Up

- **Rollback = Start Over**
- **Query = Filter**



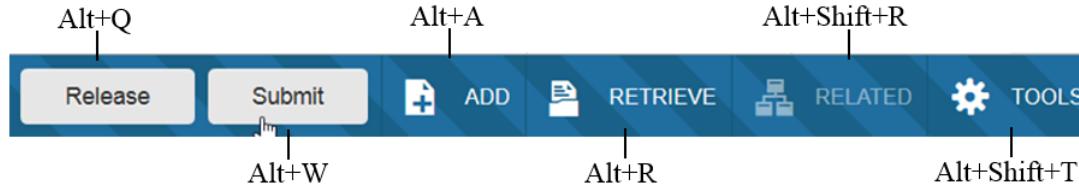
Start Over

Parts of a Page

- **Page Header**

Page Title as controlled by GUAUPRF

Actions include: Page Close, Workflow Release and Submit, BDM Add and Retrieve, Related Menu, Tools Menu, and Notification Center



- **Key Block**

When in the Key Block, the fields are displayed in columns and are enterable.

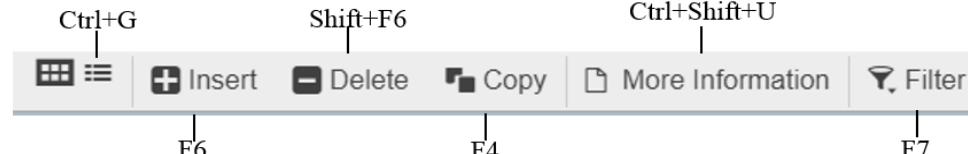
When out of the Key Block, the fields are “collapsed” into a linear format and are not enterable.

- **Sections**

Expand or collapse multiple sections

Section Header actions include:

Multiple Record, Insert, Delete, Copy, SDE More Information, and Filter



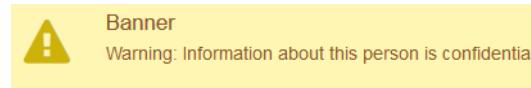
Notification Center

- **Types of Information that is Displayed**

- Green: Successful save of data



- Yellow: Warning messages



- Red: Error Messages



- Blue: Informational Messages



- **Errors are displayed in red and also display affiliated with the field/record in error**

- **Multiple errors displayed together**

- **Displays the count of errors**

The screenshot shows a web interface with a navigation bar at the top. Below the navigation, there is a list of errors for a course registration record. Each error is preceded by a red exclamation mark icon. The errors listed are:

- HC1 720 CRN 207: Campus Restriction
- HC1 720 CRN 207: Corequisite HC1 620 required
- HC1 720 CRN 207: Custom message for college restriction more than 30 characters long
- HC1 720 CRN 207: Degree Restriction
- HC1 720 CRN 207: Field of Study Restriction - Major
- HC1 720 CRN 207: Level Restriction
- HC1 720 CRN 207: Prerequisite for this class is required. Please contact your advisor or the Registration Dream Team Captain Jennifer.Carter@ellucian.com
- HC1 720 CRN 207: Program Restriction

Help Features

- **Ctrl+Shift+L: Online Help is available in the top right corner**

When in online help, use the upper left menu button to access the Contents or Search Tabs

- **Help (Item Properties) is available from Tools (Alt+Shift+T)**

Use this to identify a table/field name for writing reports or troubleshooting with your technical rep

Data Block = Table Physical Name = Field

- **For Screen Readers, GUAUPRF Enable Button Accessibility Mode**

Name Search from Key Block ID

- If the Key block has an ID field, you can tab out of the ID field into an “empty” Name Display field. Wildcards can be used.

General Person Identification SPAIDEN 9.3.11 (DEVL)

ID: ... + A%, A%

- Format is Last Name, First Name, Middle Name aka Trepe%, Ant%
- After Tabbing, if only 1 record is found, it populates the ID and you can continue. If multiple records are found:
 - Pop up window shows number count
You can Press to See Results
or Reduce Search By adding extra information like Birth Date
 - Use the Bottom Search button to reduce the search results or the button above to reset back to original count

ID and Name Extended Search

Search Detail

Reduce Search By
Group Type Person Non-Person Both
City
State or Province
ZIP or Postal Code

Person/Non-Person Count 14

Name Type
Birth Date
Gender
SSN/SIN/TIN

Press Enter Query or select button to clear search.
Enter search criteria then press Execute Query or select button to reduce search.

Other Tidbits – Related and Tools

- **Related and Tools**

Related is like Options menu for pages

Tools is like Options menu for “actions”

Note existing key-strokes continue

You've just submitted a job “printed” to the DATABASE.

You would go to Related to access GJIREVO since it's a Page.

After pulling up the output, you would go to Tools for “Show Document and Save” to open it in the web browser window as that is not a page but an action.



Search

Query Available Faculty [SIAFAVL]

Query Faculty Schedule [SIAASGQ]

Shift+F2

Query Faculty and Advisors [SIAIQRY]

Other Tidbits

- Required fields have *

Term * ... CRN * ...

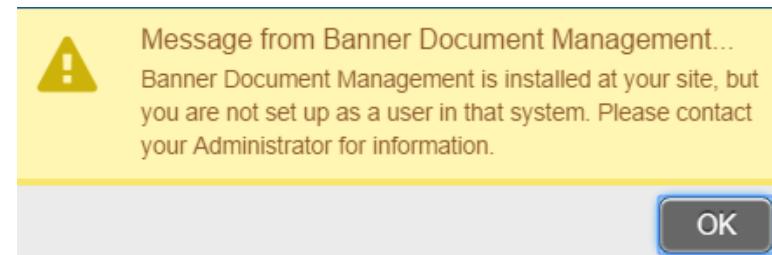
- Look up = F9 = List of Values = LOV
- Page Header: Workflow: Release = Alt + Q and Submit = Alt + W
Only shows if Banner is accessed from Workflow

- Page Header: BDM



Add = Alt + A

Retreive = Alt + R



- SDE: Available on the Section header between Copy and Filter
More Information = Ctrl+Shift+U (link grayed out if empty or lit if populated)

Other Tidbits: Single Record vs Multiple Record

Screenshot of an Ellucian University application interface showing two views of a "Detail Code Control Form - Student" record.

The top view shows a list of records with a red circle highlighting the "Insert" button in the toolbar.

Detail Code *	Detail Code Description *	Type *	Category *	Grant Type	Priority *	Refund Code	Direct Deposit	Refundable	Receipt	Active	Term Based	Aid Year Based	Like Term	Like Aid Yr
DOL	test	C	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
DOLX	test													
00SS	shweta													
015	Test Tuition													
0A	Test QA													
0AAA	EP test													
0TV	TIV													
1111	test													
1117	HarTest													
1118	hartest18													
1119	Hartest19													
1120	Hartest													
1121	Hartest21													
1122	Hartest22													
1123	Hartest23													
1125	Hartest25													
1126	Hartest26													
1608	RAY'S SUNGARD MEETING													
1612	Test													
1614	Marks Misc Fee													

The bottom view shows a detailed form for a single record, with the "Insert" button also highlighted with a red circle.

Form Fields (Top half):

- Detail Code: 0001, Undergraduate Tuition
- Type: C
- Category: TUI
- Grant Type: None
- Priority: 999
- Refund Code: None
- Refundable:
- Receipt:
- Active:
- Term Based:
- Aid Year Based:
- Like Term:
- Like Aid Year:
- Like Period:
- GL Enterable:
- Pay Type: N
- Tax Type: Title IV
- Institutional Charges:
- Exclude Invoice Print:
- Payment History:

Form Fields (Bottom half):

- Defaults:
 - Default Amount: 900.00
 - Default Term: 201110
 - Default Effective Date: [empty]
- Buttons: SAVE, 3775

Data Export

- Allows users to extract data “displayed” into an external file (.txt or .csv/.xlsx) which can be saved to a folder or opened
- Objects are enabled for Data Extract on GUAOBJS

In Banner 9, data extract is under the Tools Menu (Shift+F1)

In 8x it's under Help

- Controls for Data Extract are under GUAUPRF

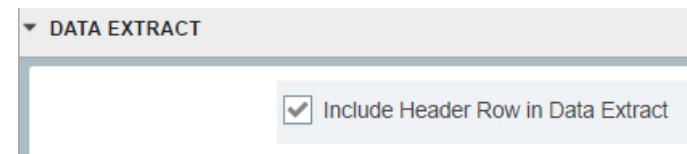
- Security

Popup Blocker

Default Technical delivery is for M access only

- This can be updated to Q access

CMS-5132: Debugging data extract option in Banner



GURUPRF_USER_ID	GURUPRF_GROUP	GURUPRF_KEY	GURUPRF_STRING	GURUPRF_VALUE
SAISUSR or possibly BASELINE	DATA_EXTRACT	WIN32COMMON	PROMPTS	Y

I vs Q Pages

- **I pages**

- Frequently start in query mode and require exit twice to leave
- Can be accessed from the Go To box
- Are very good for data extract.

- **Q pages**

- Utilize prior form record data to pre-populate keyblock
- Can NOT be accessed from Search box
- Do not typically work well with data extract
- Examples: SHQTERM, SIQSECM, SFQSECT, etc



Query access may be inadvertently invoked if a query form is visited and then a user accesses a maintenance page following that.
GSASECR: Institution Profile: Call Query can be set to Disabled to reduce this issue.

Filters

- **% and _ are wildcards**

Percent is any number of characters %Q% = any form with a Q

Underscore is a single character __Q% = any form with a Q in 3rd position

- **Queries in Banner 9 have been retooled and work a lot like excel features and come with common sql/excel like filter options. This is known as the advanced filter. A basic filter option works similar to 8.**
- **You can even choose what columns to include in the output**
- **Some query pages have “locked” columns, non locked columns can now be moved around (FGITRND)**

Movable Columns

X Detail Transaction Activity FGTRND 9.2.2 (Core-PRO)

COA: E Fiscal Year: 18 Index: Fund: Organization: 11001 Account: Program: Activity: Location: Period: Commit Type: Both

DETAILED TRANSACTION ACTIVITY

Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Document #				
7210	11001	10	YTD	1,345.00	+	INN	AAA Philanthropic			I0002062	U
5210	11001	23	YTD	1,500.00	+	GRRV	ATT			I0002099	U
7500	11001	23	YTD	-49.77	-	GRIR	ATT			I0002102	U
7500	11001	23	YTD	192.09	+	GRIC	ATT			I0002102	U
7220	11001	30	ENC	14,048.75	+	PORO	ATT			Lm201	U
7220	11001	30	ENC	120.00	+	PORO	ATT			P0002261	U
7210	11001	23	YTD	1,205.95	+	INN	ATT			I0002102	U

Basic Filtering

Person Search SOAIDEN 8.5.6 (C800) ⌂ X

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
<input type="text"/>	<input type="button"/>					
<input type="text"/>	<input type="button"/>					

X Person Search SOAIDEN 9.3.11 (TEST) + ADD ⌂ RETRIEVE RELATED TOOLS 1

PERSON SEARCH Enter a query; press F8 to execute.

Basic Filter Advanced Filter

ID Last Name First Name Middle Name

Change Indicator Add Another Field ...

Clear All Go

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name
<input type="radio"/> Case Insensitive Query <input type="radio"/> Case Sensitive Query								

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Advanced Filtering

Person Search SOAIDEN 9.3.11 (TEST) + ADD RETRIEVE RELATED TOOLS 1

PERSON SEARCH Enter a query; press F8 to execute.

Basic Filter Advanced Filter

ID Equals
Last Name Equals
First Name Equals
Middle Name Equals
Change Indicator Equals
[Add Another Field ...](#)

Equals ▾
Contains
Like
Starts With
Ends With
Equals
Not Equal

Clear All Go

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name
----	-----------	------------	-------------	------------	------------------	--------	--------	------

Case Insensitive Query Case Sensitive Query

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Queries

Enter Query = F7 = F7

Execute Query = F8 = F8

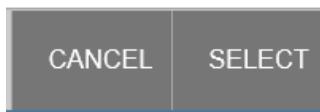
Last Criteria = F7/F7 = auto

Count Hits = Shift + F2 = auto

Cancel Query = Ctrl Q = Ctrl Q

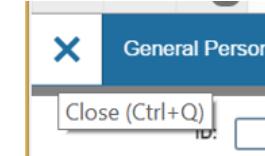
Select Record = Shift + F3 = Alt + S

Sort any column by clicking on the header to pick ASC and again for DSC



Shortcuts

Buttons display shortcut with mouse-over



Command	Banner 8	Banner 9
Save	F10	F10
Rollback/Start Over	Shift+F7	F5
Quit/Close	Ctrl+Q	Ctrl+Q
List of Values/Lookup	F9	F9
Log Out of Banner	Ctrl+Q	Ctrl+Shift+F
Next Block/Next Section; Go	Ctrl+PgDwn	Alt+PgDwn
Previous Block/Section	Ctrl+PgUp	Alt+PgUp
Clear Block/Section	Shift+F5	Shift+F5
Next Field	Tab	Tab
Previous Field	Shift+Tab	Shift+Tab
Checkbox toggle	Spacebar	Spacebar
Radio Group toggle	Left/Right Arrow	Left/Right Arrow

Shortcuts

Command

Go To: Search

Banner 8

Banner 9

F5

Ctrl+Shift+Y

Go To: Recently Opened

F5+Up/Down

Ctrl+Y+Up/Down

Forms with Tabs direct to Tab

F2

Ctrl+Shift+1, 2, 3, 4

Enter Query/Filter

F7

F7

Execute Query/Go (on Filter)

F8

F8

Select Query Result Record

Shift F3

Alt+S

Quit/Exit/Cancel Query

Ctrl+Q

Ctrl+Q

Insert Record

F6

F6

Delete Record

Shift+F6

Shift+F6

Copy Record/Section

F4

F4

Clear Record

Shift+F4

Shift+F4

Next Record

Down Arrow

Down Arrow

Previous Record

Up Arrow

Up Arrow

Shortcuts

Command

	Banner 8	Banner 9
Cut	Ctrl+X	Ctrl+X
Copy	Ctrl+C	Ctrl+C
Paste	Ctrl+V	Ctrl+V
Open Related Menu	Alt+O	Alt+Shift+R
Open Tools Menu	Alt+O	Alt+Shift+T
Help	Alt+H+H	Ctrl+Shift+L

Complex Feature Shortcuts

SDE:	Ctrl+D	Ctrl+Shift+U
Print:	Shift+F8	Ctrl+P
Data Extract/Export	Alt+H+X	Shift+F1
Change MEP Context		Ctrl+Shift+C
BDM: Add Document		Alt+A
BDM: Retrieve Document		Alt+R
Workflow: Submit		Alt+W
Workflow: Release		Alt+Q



Multi-Lingual Support

- **Delivered languages**

Arabic
English Australian
English India
English Ireland
English UK or GB
French (Canada)
French (France)
Spanish
Spanish (Latin American)
Spanish (Mexican)
Portuguese
Portuguese (Brazil)

- **Button labels, mouse over text, etc**

Job Submission “Set-up”

GJAPDEF

Edit/Create Parameter Hint Line – 78 Characters max

Edit/Create List of Value option

Edit/Provide system default value (TGRAPPL)

GJAPVAL

Provide/alter existing parameter defined values or descriptions

GJAJOBS

Default printer for the job

Default format rule

SleepWake (GJASWPT) and NOSLEEP

Job Submission Saved Parameter Sets

GJAPDFT

User stored parameter sets

Use to adjust the saved parameters (like SYSDATE)

Copy saved parameters to other users

Every user with maintenance access to Job Submission (GJAPCTL) should have maintenance access to GJAPDFT

Name Display - GUANDSP

- Does not impact Banner 8INB/SSB8 components or name searches
- Rules must be associated with a Product (Student, General, FinAid, etc)
- Rules can optionally be associated with:

Application (Faculty Grade Entry, Advising, etc)

Page (within an Application: Advising, Final Grades, etc.)

Section (within a Page: Body, Header, Class Roster, etc.)

Full Name
Caro,(Haze) Hazard

Single	Multiple	Hierarchy	Test Rules				
▼ HIERARCHY RULES				Insert	Delete	Copy	Filter
						Filter Again	×
Product		Application	Page	Section	Usage *	Maximum Length *	
Student		Faculty Grading	Final Grades	Incomplete Grades	LFMI		2000
Student		Faculty Grading	Final Grades	Student Roster	LFMI		2000
Student		Faculty Grading	Final Grades				2000



Single Name Rule

Usage Name **DEFAULT** ActivePriority * **98**Maximum Length * **2000**Name Type * ******** *******

Error Message

Comments **The default rule to be applied if all prior rules fail. A concatenation of all name parts from the current name record.**

Name Sequence

Name Prefix **1**

Name Prefix Length

First Name **2**

First Name Length

Middle Name **3**Surname Prefix **4**Last Name **5**Name Suffix **6**

Legal Name

Preferred Name

Literal Sequence

Literal 1 **13**

Literal 1 Value

Literal 2

Literal 2 Value

Literal 3

Literal 3 Value

Literal 4

Literal 4 Value

Literal 5

Literal 5 Value

Literal 6

Literal 6 Value

Preferred Name

Length

Tips for Adoption

- Have “Banner 9 Fridays” where you try to only use Banner 9 for all your work that day
- If you have a lot of repetitive records to process, try doing some in Banner 9
- Share your tips when you find navigation wins

Bonus Tip: GUISRCH

Search for ID using Email or Phone or Additional ID values

Settings on GTVADID limit which ADID codes can be searched

X General Search GUISRCH 9.3 (PPRD)

ADD RETRIEVE RELATED TOOLS

Start Over

Additional ID: E-mail: Country Code: % Area Code: 909 Phone Number: 541%

Enter one search criteria (Additional Id,E-Mail,Telephone) and press Press GO to list matching records

GENERAL SEARCH

ID	First Name	Middle Name	Last Name	Prefix	Suffix	Birth Date	Telephone Code	Telephone Number
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]			02/19/1995	CELL	909 5412432
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]			02/19/1995	LOCL	909 5412432

Summary

- Navigating Banner has some important changes but also many great enhancements

Questions

Please fill out Session Survey EL253775

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Thank you.

We want to hear from you.

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