Ellucian Banner Admin Navigation: Tips and Tricks

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Session rules of etiquette

- 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
2. Application Navigator and the Main Menu
3. Terminology and Parts of a Page
4. Notification Center and Help
5. Name Search
6. Other Tidbits
7. Data Export
8. Queries
9. Shortcut Keys
10. Multi-lingual support
11. Job Submission
12. Name Display
13. Tips for Adoption of Banner 9
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.
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

*Who the logged in user is

Navigator Sign Out = Ctrl + Shift + F

Change MEP entity icon Ctrl+Shift+C
Application Navigator

• 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”
• **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.

• **GUAOBJ/GUTGMNU: Create Subfolders**
  You can create subfolders in My Banner by adding a folder object to GUAOBJ/GUT 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**

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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
Notation 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
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.

  • 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
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.
Other Tidbits

• Required fields have *

• 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
  Retrieve = 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

The image shows a screenshot of a software interface for managing detail codes, specifically for a student's information. The interface includes columns for 'Detail Code', 'Detail Code Description', 'Type', 'Category', 'Priority', 'Refund Code', and other fields related to financial aid and billing. The interface allows for adding, retrieving, and modifying data.

For example, a detail code '2001' is displayed with a description 'Undergraduate Tuition'. The interface also has options for adding, deleting, and copying records, as well as filtering capabilities.

The context seems to be related to managing educational records, particularly focusing on financial aid and tuition details for students.
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 GUAOBSJS
  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

<table>
<thead>
<tr>
<th>GURUPRF USER ID</th>
<th>GURUPRF GROUP</th>
<th>GURUPRF KEY</th>
<th>GURUPRF STRING</th>
<th>GURUPRF VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAISUSR or possibly BASELINE</td>
<td>DATA_EXTRACT</td>
<td>WIN32COMMON</td>
<td>PROMPTS</td>
<td>Y</td>
</tr>
</tbody>
</table>
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, SIQSEC, SFQSEC, etc

Query access may be inadvertently invoked if a query form is visited and than 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
Basic Filtering
Advanced Filtering

![Advanced Filtering interface](image-url)
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

<table>
<thead>
<tr>
<th>Command</th>
<th>Banner 8</th>
<th>Banner 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>F10</td>
<td>F10</td>
</tr>
<tr>
<td>Rollback/Start Over</td>
<td>Shift+F7</td>
<td>F5</td>
</tr>
<tr>
<td>Quit/Close</td>
<td>Ctrl+Q</td>
<td>Ctrl+Q</td>
</tr>
<tr>
<td>List of Values/Lookup</td>
<td>F9</td>
<td>F9</td>
</tr>
<tr>
<td>Log Out of Banner</td>
<td>Ctrl+Q</td>
<td>Ctrl+Shift+F</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Next Block/Next Section; Go</th>
<th>Ctrl+PgDwn</th>
<th>Alt+PgDwn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Block/Section</td>
<td>Ctrl+PgUp</td>
<td>Alt+PgUp</td>
</tr>
<tr>
<td>Clear Block/Section</td>
<td>Shift+F5</td>
<td>Shift+F5</td>
</tr>
<tr>
<td>Next Field</td>
<td>Tab</td>
<td>Tab</td>
</tr>
<tr>
<td>Previous Field</td>
<td>Shift+Tab</td>
<td>Shift+Tab</td>
</tr>
<tr>
<td>Checkbox toggle</td>
<td>Spacebar</td>
<td>Spacebar</td>
</tr>
<tr>
<td>Radio Group toggle</td>
<td>Left/Right Arrow</td>
<td>Left/Right Arrow</td>
</tr>
<tr>
<td>Command</td>
<td>Banner 8</td>
<td>Banner 9</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>----------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>Go To: Search</td>
<td>F5</td>
<td>Ctrl+Shift+Y</td>
</tr>
<tr>
<td>Go To: Recently Opened</td>
<td>F5+Up/Down</td>
<td>Ctrl+Y+Up/Down</td>
</tr>
<tr>
<td>Forms with Tabs direct to Tab</td>
<td>F2</td>
<td>Ctrl+Shift+1, 2, 3, 4</td>
</tr>
<tr>
<td>Enter Query/Filter</td>
<td>F7</td>
<td>F7</td>
</tr>
<tr>
<td>Execute Query/Go (on Filter)</td>
<td>F8</td>
<td>F8</td>
</tr>
<tr>
<td>Select Query Result Record</td>
<td>Shift F3</td>
<td>Alt+S</td>
</tr>
<tr>
<td>Quit/Exit/Cancel Query</td>
<td>Ctrl+Q</td>
<td>Ctrl+Q</td>
</tr>
<tr>
<td>Insert Record</td>
<td>F6</td>
<td>F6</td>
</tr>
<tr>
<td>Delete Record</td>
<td>Shift+F6</td>
<td>Shift+F6</td>
</tr>
<tr>
<td>Copy Record/Section</td>
<td>F4</td>
<td>F4</td>
</tr>
<tr>
<td>Clear Record</td>
<td>Shift+F4</td>
<td>Shift+F4</td>
</tr>
<tr>
<td>Next Record</td>
<td>Down Arrow</td>
<td>Down Arrow</td>
</tr>
<tr>
<td>Previous Record</td>
<td>Up Arrow</td>
<td>Up Arrow</td>
</tr>
</tbody>
</table>
# Shortcuts

<table>
<thead>
<tr>
<th>Command</th>
<th>Banner 8</th>
<th>Banner 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut</td>
<td>Ctrl+X</td>
<td>Ctrl+X</td>
</tr>
<tr>
<td>Copy</td>
<td>Ctrl+C</td>
<td>Ctrl+C</td>
</tr>
<tr>
<td>Paste</td>
<td>Ctrl+V</td>
<td>Ctrl+V</td>
</tr>
<tr>
<td>Open Related Menu</td>
<td>Alt+O</td>
<td>Alt+Shift+R</td>
</tr>
<tr>
<td>Open Tools Menu</td>
<td>Alt+O</td>
<td>Alt+Shift+T</td>
</tr>
<tr>
<td>Help</td>
<td>Alt+H+H</td>
<td>Ctrl+Shift+L</td>
</tr>
</tbody>
</table>

## Complex Feature Shortcuts

<table>
<thead>
<tr>
<th>Feature</th>
<th>Shortcut</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>SDE:</td>
<td>Ctrl+D</td>
<td>Ctrl+Shift+U</td>
</tr>
<tr>
<td>Print:</td>
<td>Shift+F8</td>
<td>Ctrl+P</td>
</tr>
<tr>
<td>Data Extract/Export</td>
<td>Alt+H+X</td>
<td>Shift+F1</td>
</tr>
<tr>
<td>Change MEP Context</td>
<td>Ctrl+Shift+C</td>
<td></td>
</tr>
<tr>
<td>BDM: Add Document</td>
<td>Alt+A</td>
<td></td>
</tr>
<tr>
<td>BDM: Retrieve Document</td>
<td>Alt+R</td>
<td></td>
</tr>
<tr>
<td>Workflow: Submit</td>
<td>Alt+W</td>
<td></td>
</tr>
<tr>
<td>Workflow: Release</td>
<td>Alt+Q</td>
<td></td>
</tr>
</tbody>
</table>
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.)

<table>
<thead>
<tr>
<th>Product</th>
<th>Application</th>
<th>Page</th>
<th>Section</th>
<th>Usage *</th>
<th>Maximum Length *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Faculty Grading</td>
<td>Final Grades</td>
<td>Incomplete Grades</td>
<td>LFMI</td>
<td>2000</td>
</tr>
<tr>
<td>Student</td>
<td>Faculty Grading</td>
<td>Final Grades</td>
<td>Student Roster</td>
<td>LFMI</td>
<td>2000</td>
</tr>
<tr>
<td>Student</td>
<td>Faculty Grading</td>
<td>Final Grades</td>
<td></td>
<td></td>
<td>2000</td>
</tr>
</tbody>
</table>
Single Name Rule

- Usage Name: DEFAULT
- Priority: 98
- Name Type: ****
- 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
- First Name: 2
- Middle Name: 3
- Surname Prefix: 4
- Last Name: 5
- Name Suffix: 6
- Legal Name: 7
- Preferred Name: 8

Literal Sequence

<table>
<thead>
<tr>
<th>Literal</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literal 1</td>
<td>[ ]</td>
</tr>
<tr>
<td>Literal 2</td>
<td></td>
</tr>
<tr>
<td>Literal 3</td>
<td></td>
</tr>
<tr>
<td>Literal 4</td>
<td></td>
</tr>
<tr>
<td>Literal 5</td>
<td></td>
</tr>
<tr>
<td>Literal 6</td>
<td></td>
</tr>
</tbody>
</table>
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
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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