Ellucian Banner Admin Navigation: Tips and Tricks

ellucian LIVE 2019

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SESSION ID: EL253775

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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!

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Introduction

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

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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

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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

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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.**

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Application Navigator

Menu Toggle – Displays Icon Names

- **The Welcome Screen: 4 ways to navigate**

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

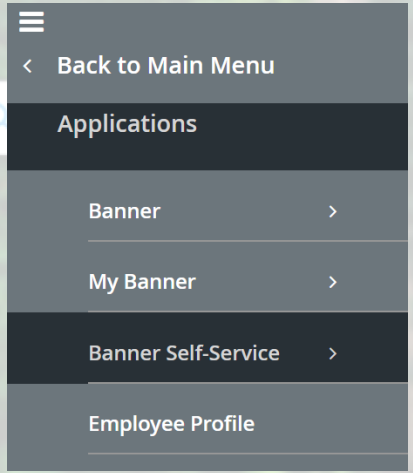
Applications Icon: basically the main menu Ctrl + M

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

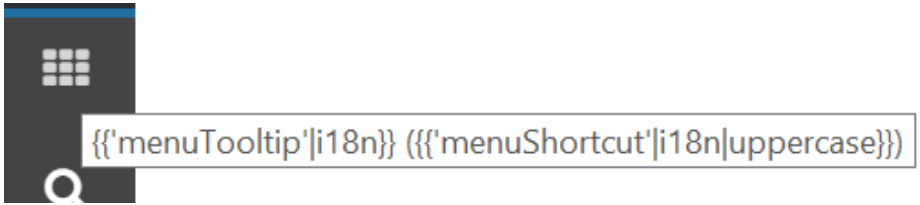
Navigator Sign Out = Ctrl + Shift + F



***Who the logged in user is**

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"**

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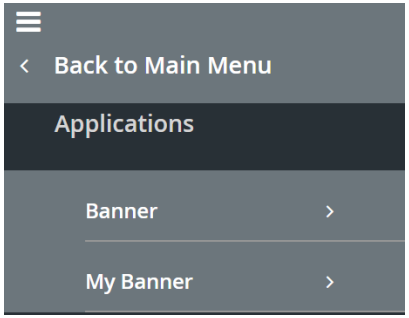
My Banner



- **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

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Terminology

- **Forms = Pages**
- **From Key Block; Next Block = Go**

- **Blocks become Sections**

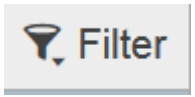
Alt Page Down and

Alt Page Up

Bottom left icons

- **Rollback = Start Over**

- **Query = Filter**



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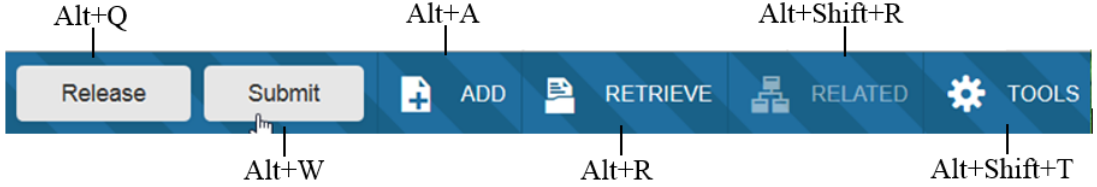
Parts of a Page

- **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**

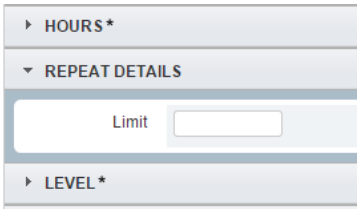
  When in the Key Block, the fields are displayed in columns and are enterable. When out of the Key Block, the fields are "collapsed" into a linear format and are not enterable.

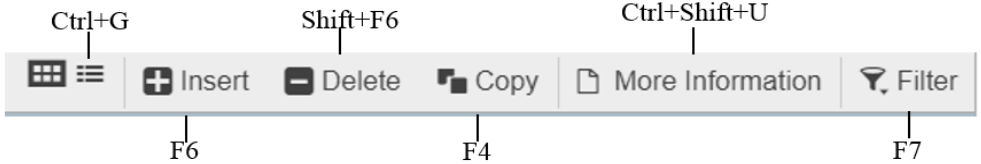
- **Sections**

  Expand or collapse multiple sections

  Section Header actions include:

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





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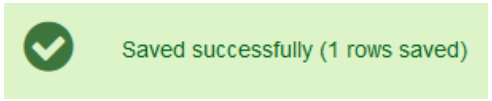
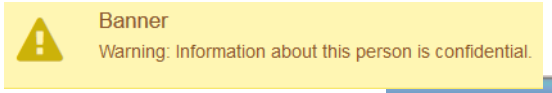
Notification Center

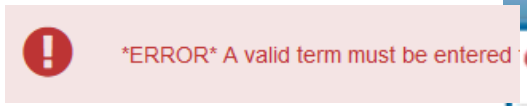
- **Types of Information that is Displayed**
  - Green: Successful save of data

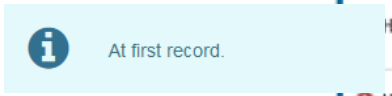
  - Yellow: Warning messages

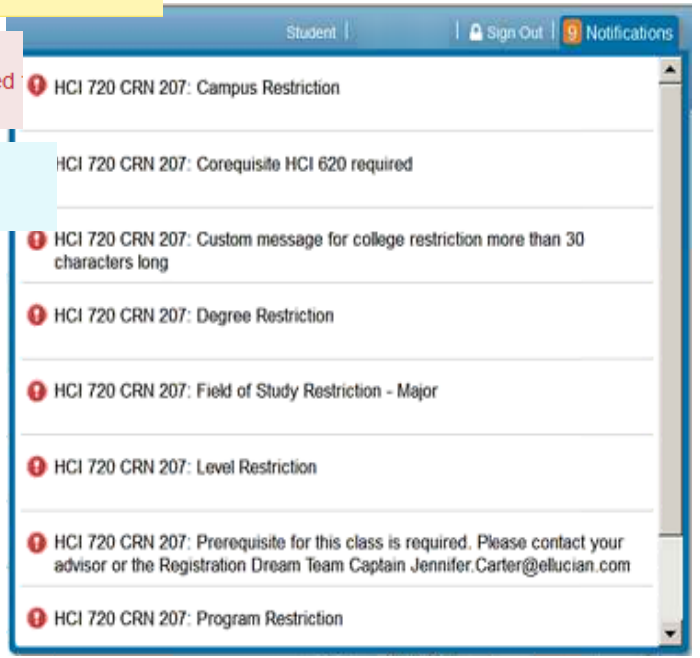
  - Red: Error Messages

  - 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**



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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**

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Name Search from Key Block ID

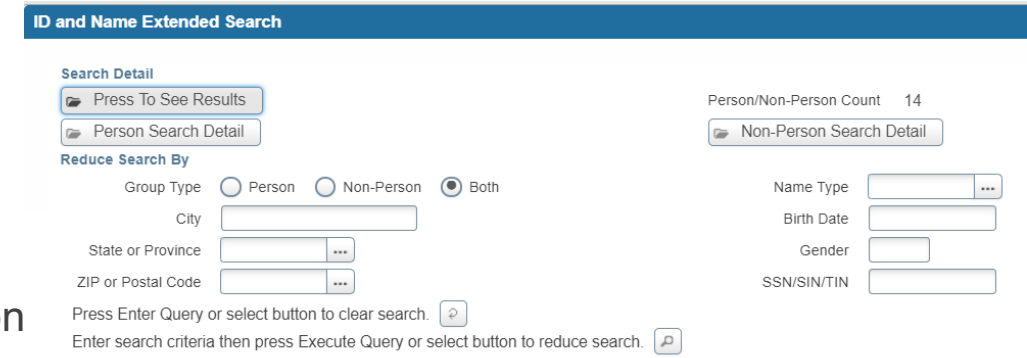
- **If the Key block has an ID field, you can tab out of the ID field into an "empty" Name Display field. Wildcards can be used.**

  - 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



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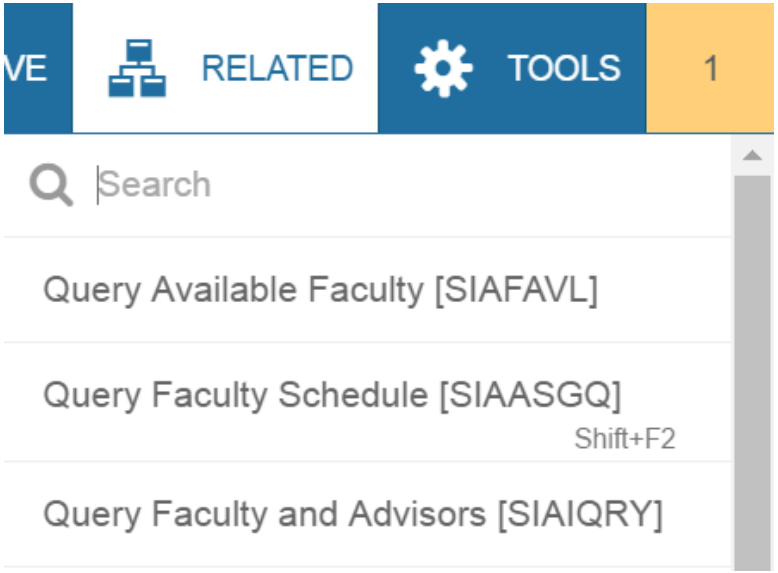
Other Tidbits – Related and Tools

- **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.

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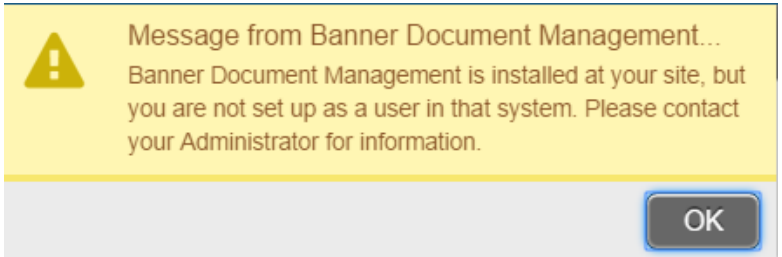
Other Tidbits

- **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

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)

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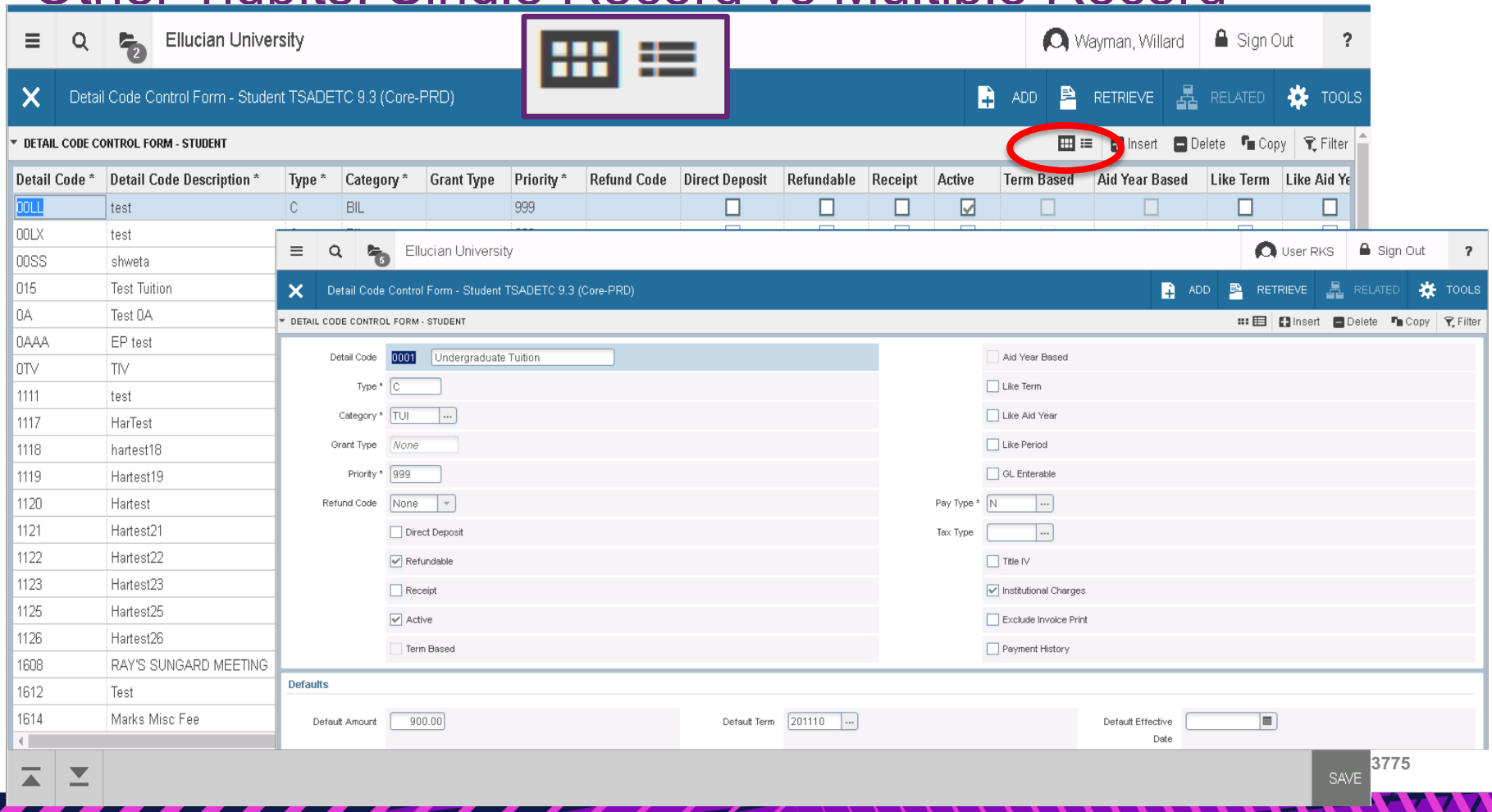
Other Tidbits: Single Record vs Multiple Record



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**

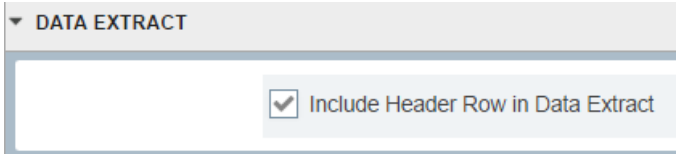
  In Banner 9, data extract is under the Tools Menu (Shift+F1)

  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

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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 than a user accesses a maintenance page following that. GSASECR: Institution Profile: Call Query can be set to Disabled to reduce this issue.

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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)**

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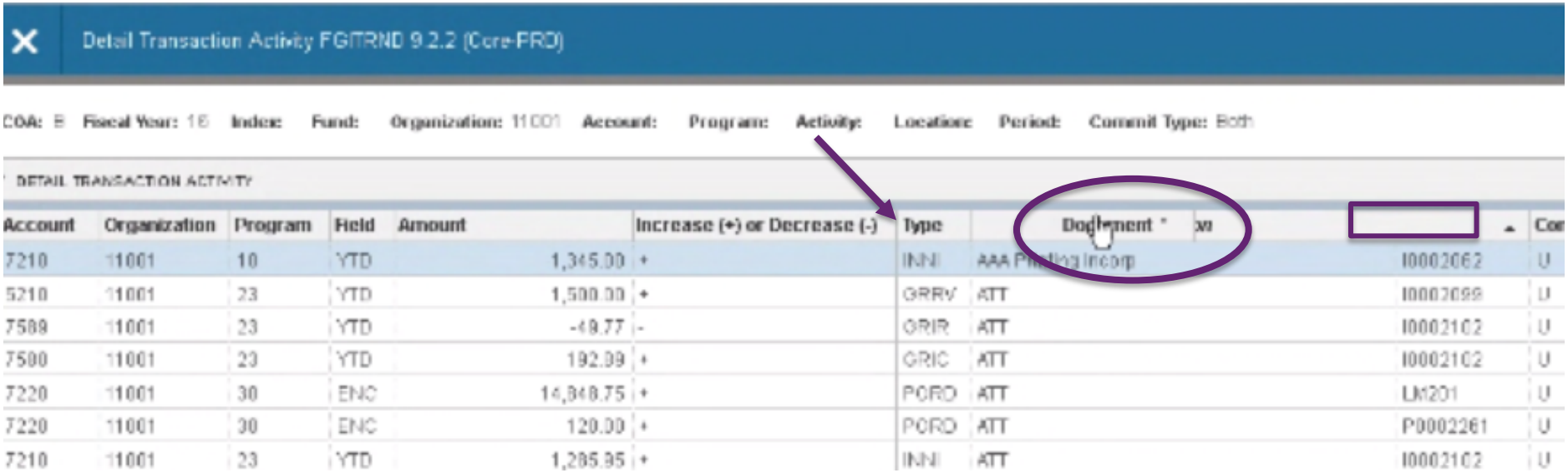
Movable Columns



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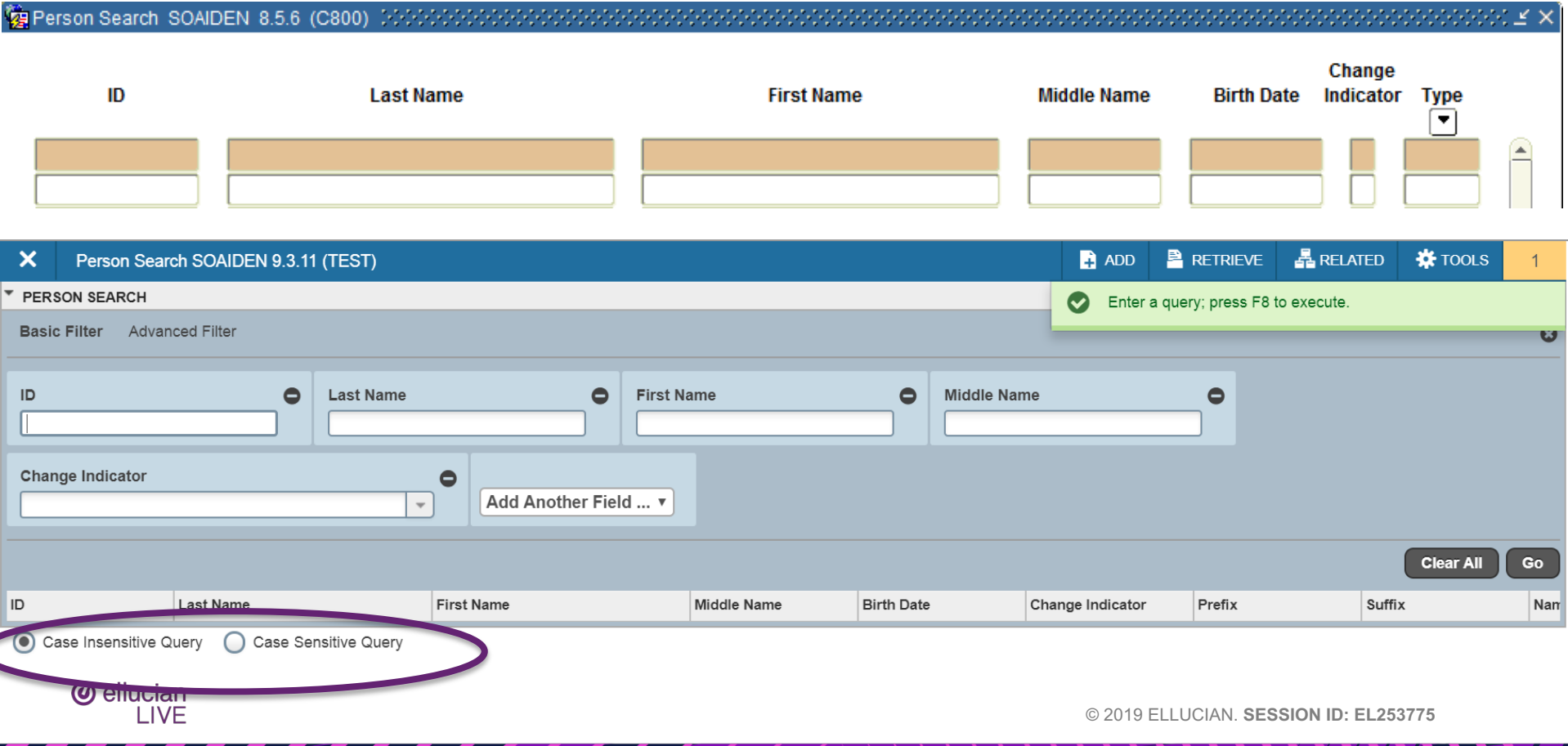
Basic Filtering



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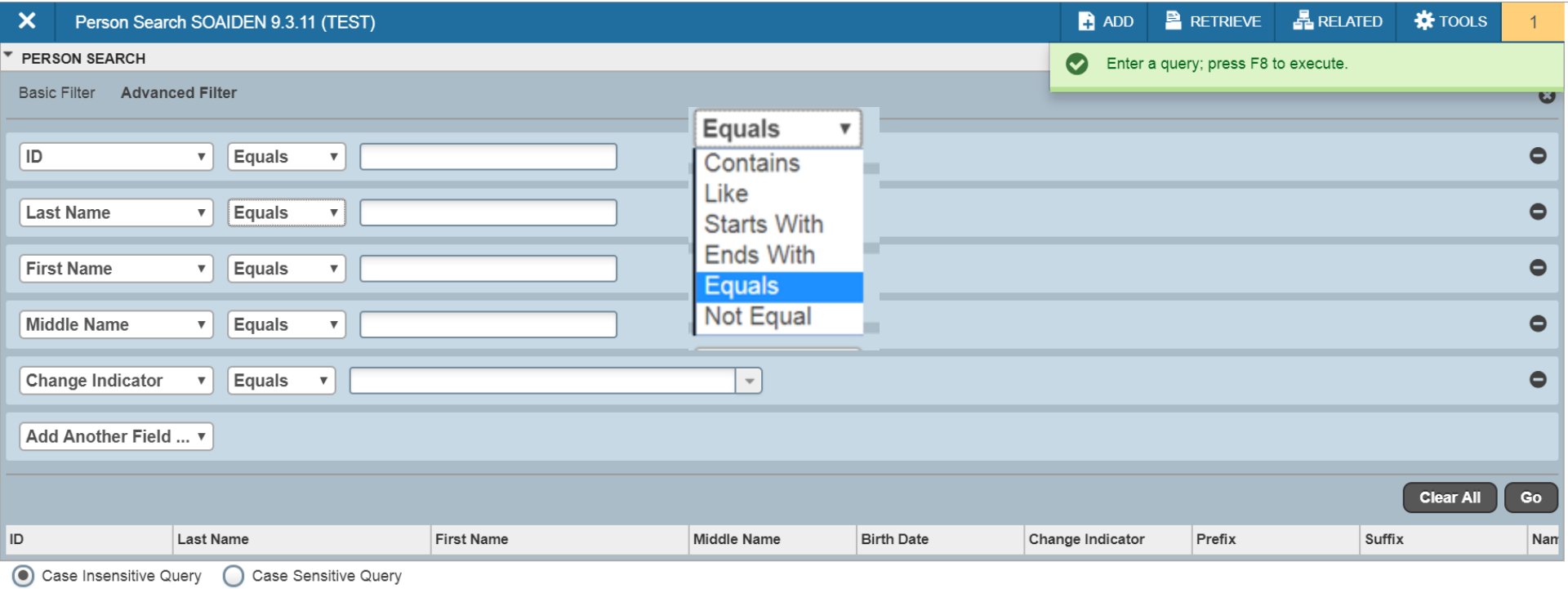
Advanced Filtering



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Queries

Enter Query = F7 = F7

Execute Query = F8 = F8

Last Criteria = F7/F7 = auto

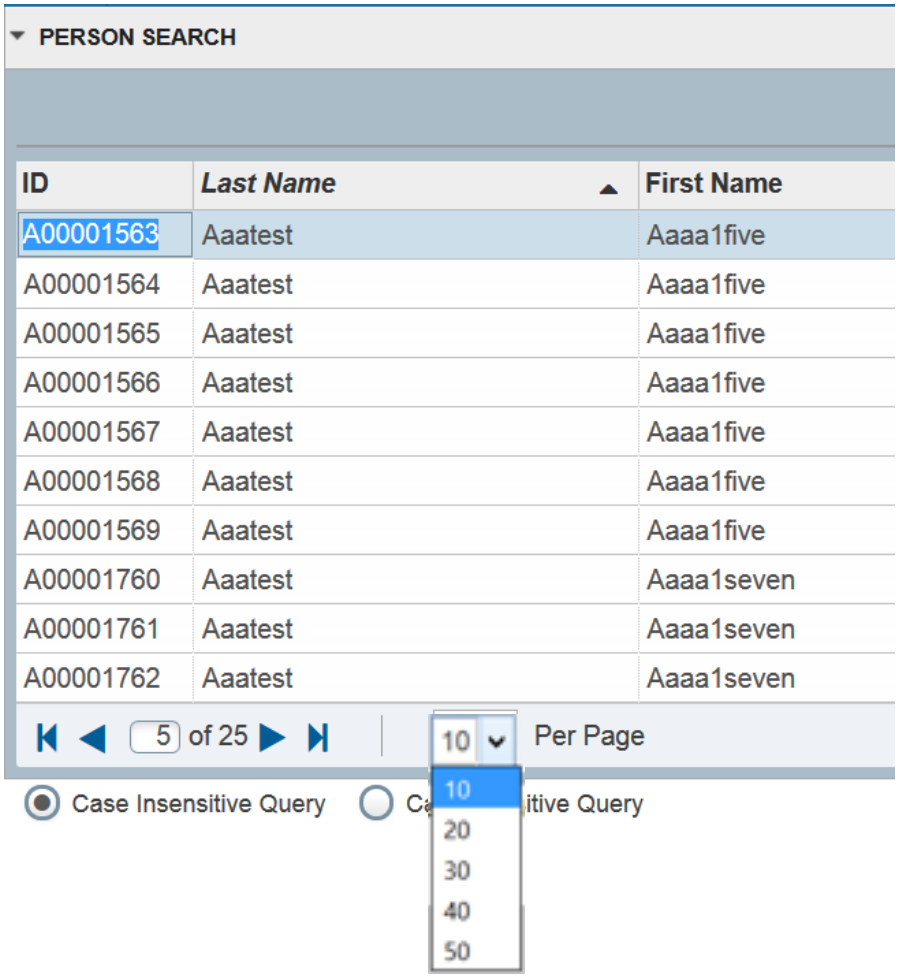
Count Hits = Shift + F2 = auto

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

CANCEL SELECT



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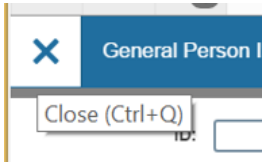
Shortcuts

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

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Shortcuts

Command	Banner 8	Banner 9
Go To: Search	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

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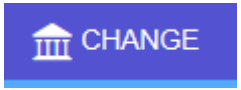
Shortcuts

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



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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**

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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

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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

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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

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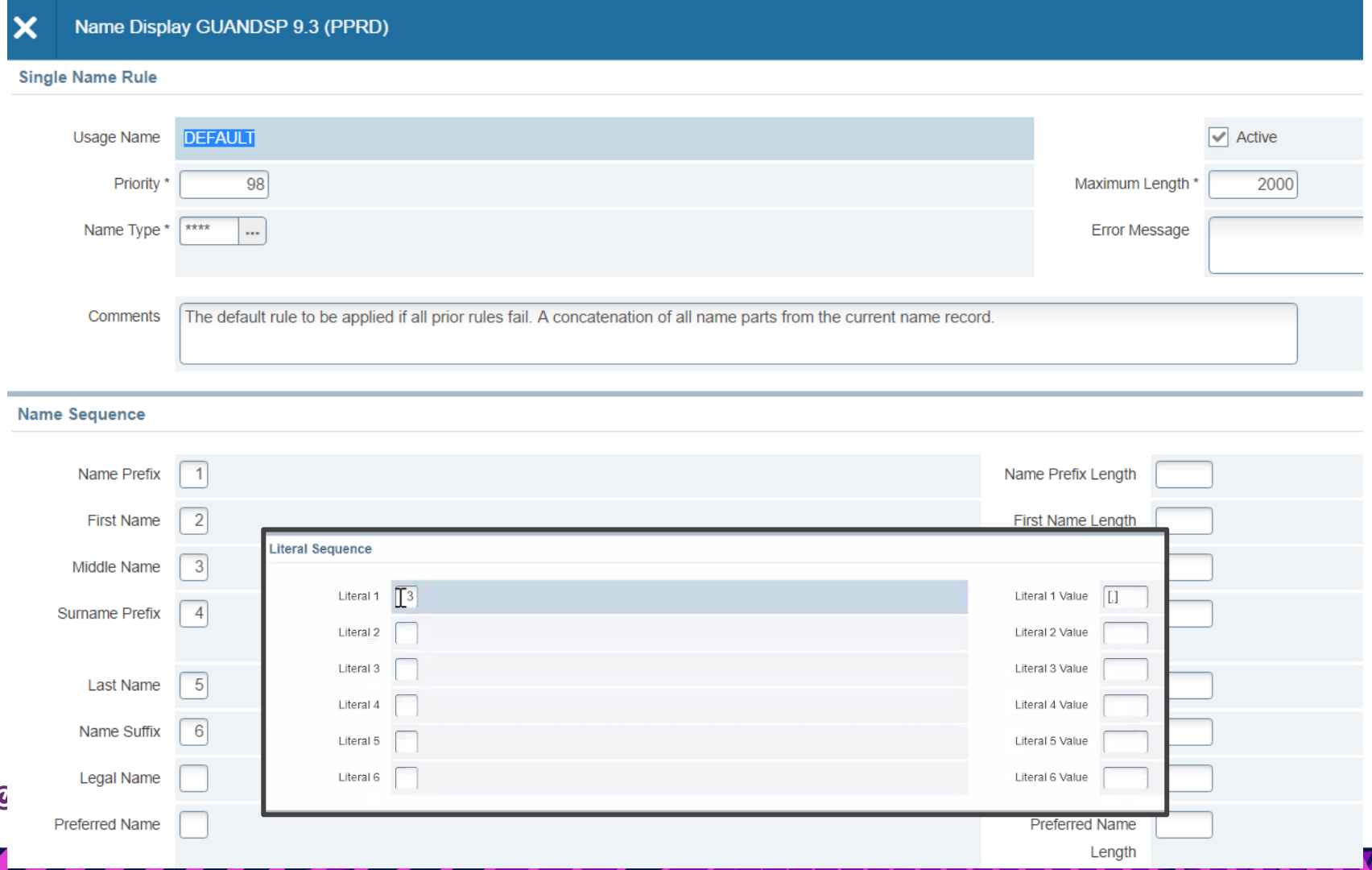
Name Display GUANDSP 9.3 (PPRD)
Single Name Rule
Usage Name
DEFAULT
Active
Priority *
98
Maximum Length *
2000
Name Type *
****
Error Message
Comments
The default rule to be applied if all prior rules fail. A concatenation of all name parts from the current name record.
Name Sequence
Name Prefix
1
Name Prefix Length
First Name
2
First Name Length
Middle Name
3
Surname Prefix
4
Literal Sequence
Literal 1
3
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
Last Name
5
Name Suffix
6
Legal Name
Preferred Name
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**

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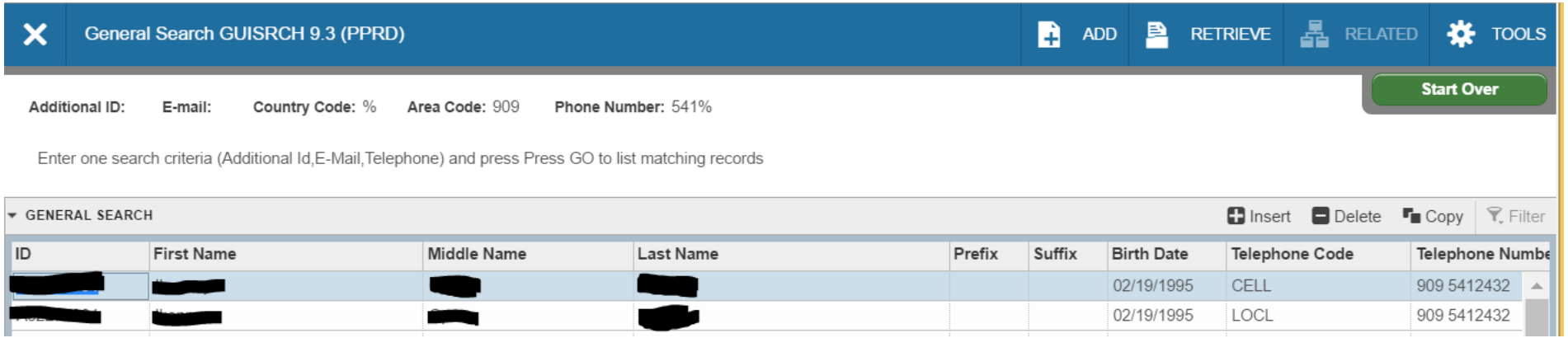
Bonus Tip: GUISRCH

Search for ID using Email or Phone or Additional ID values

Settings on GTVADID limit which ADID codes can be searched



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Summary

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

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Questions

Please fill out Session Survey EL253775

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Thank you.

We want to hear from you.

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