




Navigating Banner 9

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2


Introduction



- There are many cool new user experience improvements in Banner
- Let's discover (or rediscover) how to navigate 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 slide

1 #1 Best Feature

2 Application Navigator and the Main Menu

3 Terminology and Parts of a Page

4 Notification Center and Help

5 Other Tidbits

6 Data Export


7 Queries

8 Shortcuts

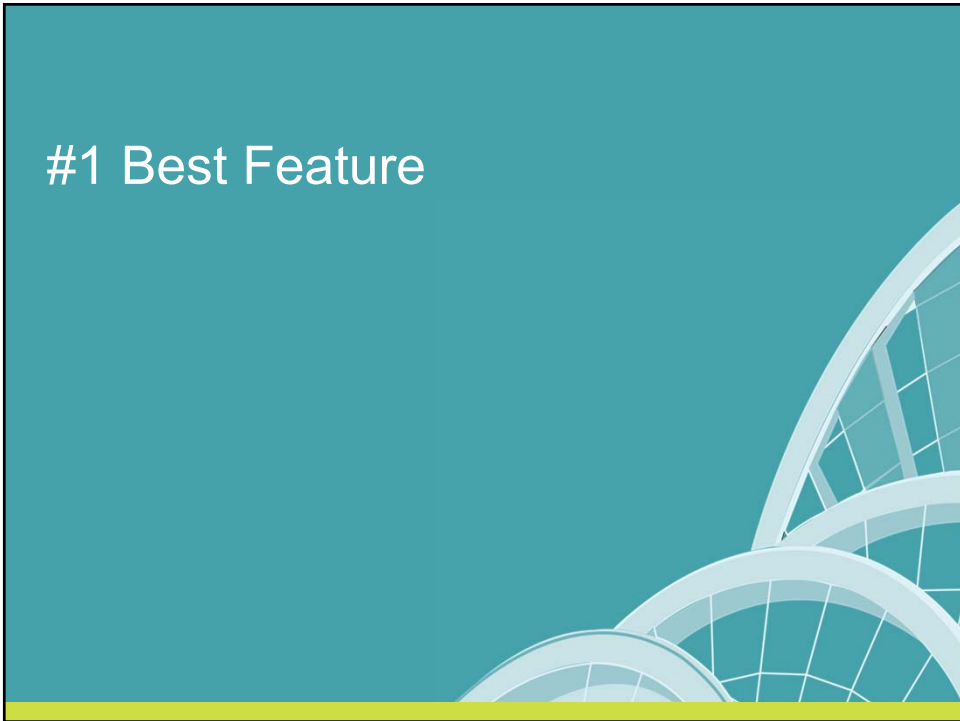
9 Multilingual Support

10 Display Name Functionality

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#1 Best Feature



#1 Best Feature

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- **How to make Banner BIGGER**
 - Ctrl = increase zoom (essentially ctrl with +)
 - Ctrl – decrease zoom
 - Ctrl 0 reset zoom to 100%
- **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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7

Application Navigator and the Main Menu



Application Navigator



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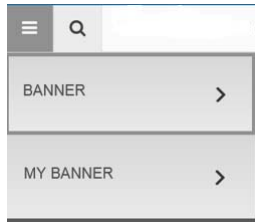
- **The Welcome Screen: 4 ways to navigate**
 - Search box: searches page names and descriptions = Ctrl + Home
 - Search Icon: kind of like having "Go To box." Ctrl + Shift + Y
 - Recently Opened Icon: previously found under file and maxed at 10 forms. Now includes all objects opened. Like the Go To box list of forms. Ctrl + Y
 - Menu Icon: basically the main menu Ctrl + M
- **Navigator Help = Ctrl + Shift + L**
- **Navigator Sign Out = Ctrl + Shift + F**
- **Yes, you can change the pretty campus picture**

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Main Menu Tricks




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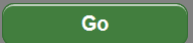
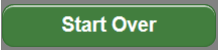

- **Tricks about My Banner**
 - When using GUAPMNU, you can "rename" objects and they are unique to the My Banner setup. This does not rename objects in the system.
 - You can create subfolders in My Banner by adding a folder object to GUAOBS and then referencing the fold in the My Banner form.
 - Recommend creating folders labeled by office or user with a one up (*REGOFF1, *REGOFF2, etc).
 - You can use GUTGMNU to edit what objects belong in subfolders.
 - 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.
 - Confirm object is part of Banner 9 using GUAPAGE.


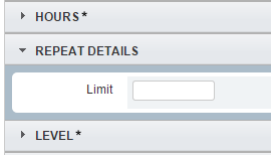
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Terminology and Parts of a Page

Terminology



- **Forms = Pages**
- **From Key Block; Next Block = Go** 
- **Blocks become Sections**
 - Alt Page Down and
 - Alt Page Up
- **Rollback = Start Over** 
- **Query = Filter** 



Bottom left icons

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Parts of a Page


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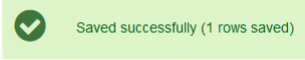

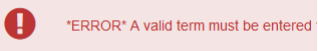

- **Page Header**
 - Page Title as controlled by GUAUPRF
 - Actions include: Page Close, Workflow Release and Submit, BDM Add and Retrieve, Related Menu, Tools Menu, and Notification Center
- **Key Block**
 - When in the Key Block, the fields are displayed in columns and are enterable. When out of the Key Block, the fields are rearranged into a linear format and are not enterable.
- **Sections**
 - If a page has multiple sections, they can be expanded or collapsed
 - Header actions include: Multiple Record, Insert, Delete, Copy, Filter, and SDE More Information

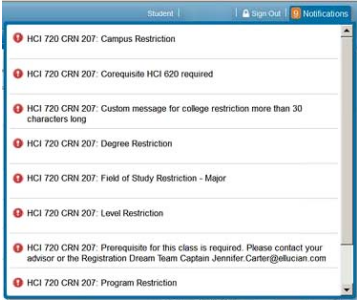
Notification Center and Help



Notification Center and Help




- 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



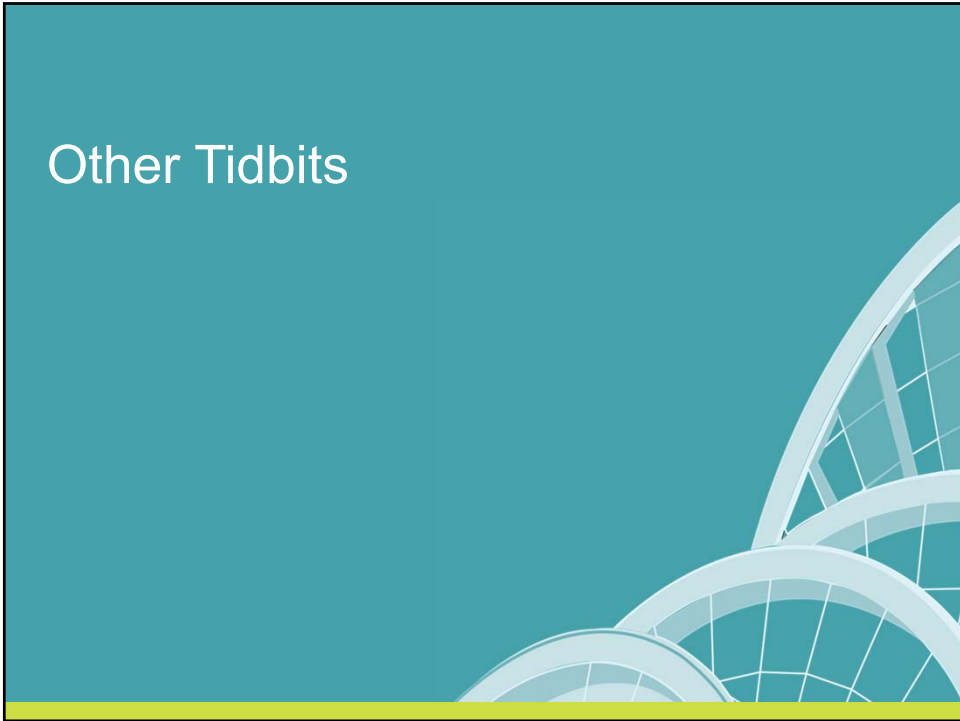
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Notification Center and Help



- 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
- Help (All Fields) is only in Banner 8 at this time**
 - like GURPDED but better

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Other Tidbits

- **Exit without saving**
 - Use tab to select option
 - Then Enter
- **Related and Tools**
 - Related is like Options menu for pages
 - Tools is like Options menu for actions
 - Note existing key-strokes continue

The screenshot shows a software interface with a purple header containing "ellucian LIVE | 2017". A yellow warning dialog box is displayed, asking "Warning! Possible loss of changes. Do you want to save changes?" with "Yes", "No", and "Cancel" buttons. Below the dialog is a navigation bar with "LIVE", "RELATED", "TOOLS", and "1". A search menu is open, showing a search bar and three results: "Query Available Faculty [SIAFAVL]", "Query Faculty Schedule [SIAASGQ] Shift+F2", and "Query Faculty and Advisors [SIAIQRY]".

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Other Tidbits

- **Required fields have *** Term * CRN *
- **ook 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**

Release Submit ADD RETRIEVE RELATED TOOLS

 - Add = Alt + A
 - Retrieve = Alt + R
- **SDE: Available on the Section header between Copy and Filter**
More Information = Ctrl+Shift+U
 - SDE fields Exist but are empty SDE fields have data

Message from Banner Document Management...
Banner Document Management is installed at your site, but you are not set up as a user in that system. Please contact your Administrator for information.

OK

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Other Tidbits: Single Record / Multiple Record Toggle

= Ctrl + G

Detail Code	Detail Code Description	Type	Category	Grant Type	Priority	Refund Code	Direct Deposit	Refundable	Receipt	Active	Term Based	Like Term	Like Aid Yr
0001	test	C	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0001	test	C	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0055	shweta	C	CNT		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
015	Test Tuition	C	TLR		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0A	Test GA	C	FEE		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0AAA	EP test	C	FEE		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0TV	TV	P	PPL		999		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1111	test	C	TLR		999	Y	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1117	Hstest	C	BIL		999	Y	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1118	Hstest18	P	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1119	Hstest19	C	BIL		999	Y	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1120	Hstest	P	CNT		999	Y	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1121	Hstest21	C	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1122	Hstest22	P	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1123	Hstest23	C	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1125	Hstest25	P	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1126	Hstest26	C	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1608	RAY'S SUNGARD MEETING	C	BIL		999		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1612	Test	P	BIL		999		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1614	Marks Misc Fee	C	DPT		999		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Tidbits: Single Record / Multiple Record Toggle

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Detail Code Control Form - Student TSACETC 9.3 (Core-PRD) | ADD | RETRIEVE | RELATED | TOOLS

DETAIL CODE CONTROL FORM - STUDENT

Detail Code: Undergraduate Tuition

Type: C

Category: TUB

Grant Type: None

Priority: 999

Refund Code: None

Direct Deposit

Refundable

Percent

Active

Term Based

Add Year Based

Like Term

Like Aid Year

Like Period

OL Enterable

Pay Type: N

Tax Type:

Title IV

Institutional Charges

Exclude Invoice Print

Payment History

Defaults

Default Amount: 900.00 | Default Term: 201110 | Default Effective Date:

Record 1 of 959

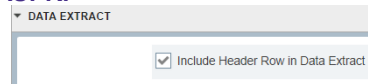
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Data Export

Data Export

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- **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 GUAOBS**
 - 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



Queries

Things you didn't know you didn't know

Queries

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- % 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.
- 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).

Queries: Movable Columns

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FGITRND – has locked columns (Account through Increase/Decrease)
 The remaining columns are “free” and can be moved and re-arranged.
 Columns can also be sorted ASC or DSC

Detail Transaction Activity: FGITRND 9 2.2 (Core-PRO)

OMA: E Fiscal Year: 16 Index: Fund: Organization: 11001 Account: Program: Activity: Location: Period: Council Type: Both

DETAIL TRANSACTION ACTIVITY:

Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Department	Co		
7210	11001	10	YTD	1,345.00	+	INN	AAA PERSAL	11002062	U	
7210	11001	23	YTD	1,500.00	+	GRRV	ATT	10002088	U	
7588	11001	23	YTD	-49.77	-	GRIR	ATT	10002102	U	
7590	11001	23	YTD	192.99	+	GRIC	ATT	10002102	U	
7220	11001	30	ENC	14,348.75	+	PORD	ATT	110201	U	
7220	11001	30	ENC	120.00	+	PORD	ATT	P0002261	U	
7210	11001	23	YTD	1,285.95	+	INN	ATT	10002102	U	

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Queries ellucian LIVE 2017

Person Search SOAIDEN 8.5.6 (C800)

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type

•Query = Filter
•Execute = Go

PERSON SEARCH

Contains
 Starts With
 Ends With
 Equals
 Not Equal
 Not Equal or IS NULL
 IS NULL
 IS NOT NULL
 Name Type

Case Insensitive Query
 Case Sensitive Query

Clear All Go

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Enter Query = F7 = F7
 Execute Query = F8 = F8
 Quit Query = Ctrl Q = Ctrl Q
 Last Criteria = F7/F7 = auto
 Count Hits = Shift + F2 = auto

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

PERSON SEARCH

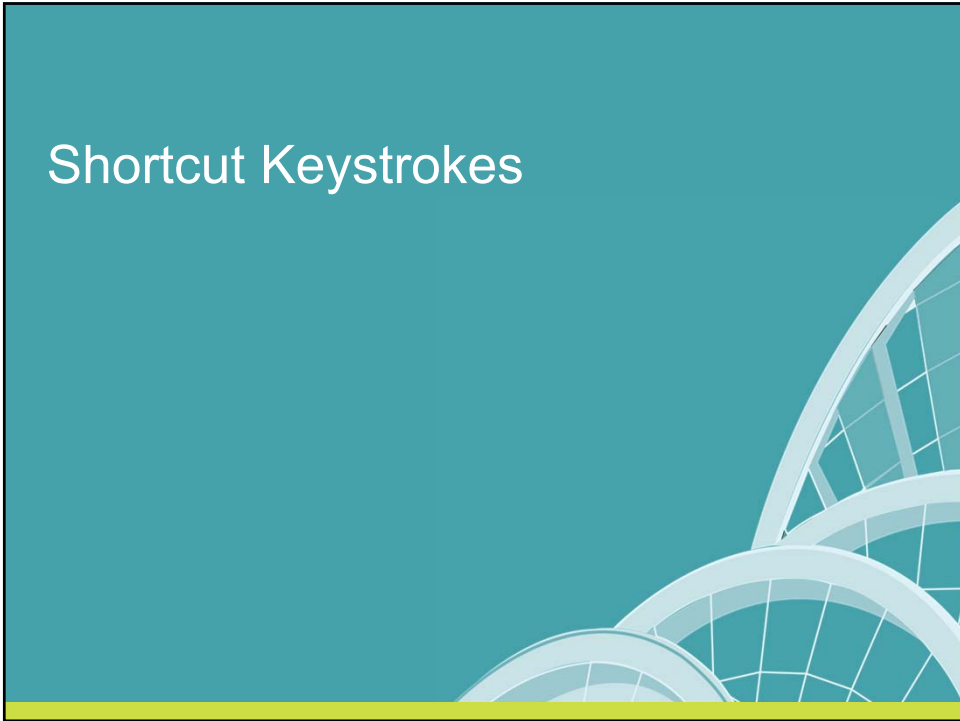
ID	Last Name	First Name
A00001563	Aaatest	Aaaa1five
A00001564	Aaatest	Aaaa1five
A00001565	Aaatest	Aaaa1five
A00001566	Aaatest	Aaaa1five
A00001567	Aaatest	Aaaa1five
A00001568	Aaatest	Aaaa1five
A00001569	Aaatest	Aaaa1five
A00001760	Aaatest	Aaaa1seven
A00001761	Aaatest	Aaaa1seven
A00001762	Aaatest	Aaaa1seven

Case Insensitive Query
 Case Sensitive Query

10 Per Page Record 41 of 242
 10
 20
 30
 40
 50

CANCEL SELECT

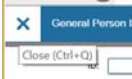
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Shortcuts


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
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



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Shortcuts

<u>Command</u>	<u>Banner 8</u>	<u>Banner 9</u>
Enter Query/Filter	F7	F7
Execute Query/Go (on Filter)	F8	F8
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
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

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Shortcuts: Complex Features

<u>Command</u>	<u>Banner 8</u>	<u>Banner 9</u>
SDE:	Ctrl+D	Ctrl+Shift+U
Print:	Shift+F8	Ctrl+P
Data Extract/Export	Alt+H+X	Shift+F1
Change MEP Context		Alt+Shift+C
BDM: Add Document		Alt+A
BDM: Retrieve Document		Alt+R
Workflow: Submit		Alt+W
Workflow: Release		Alt+Q

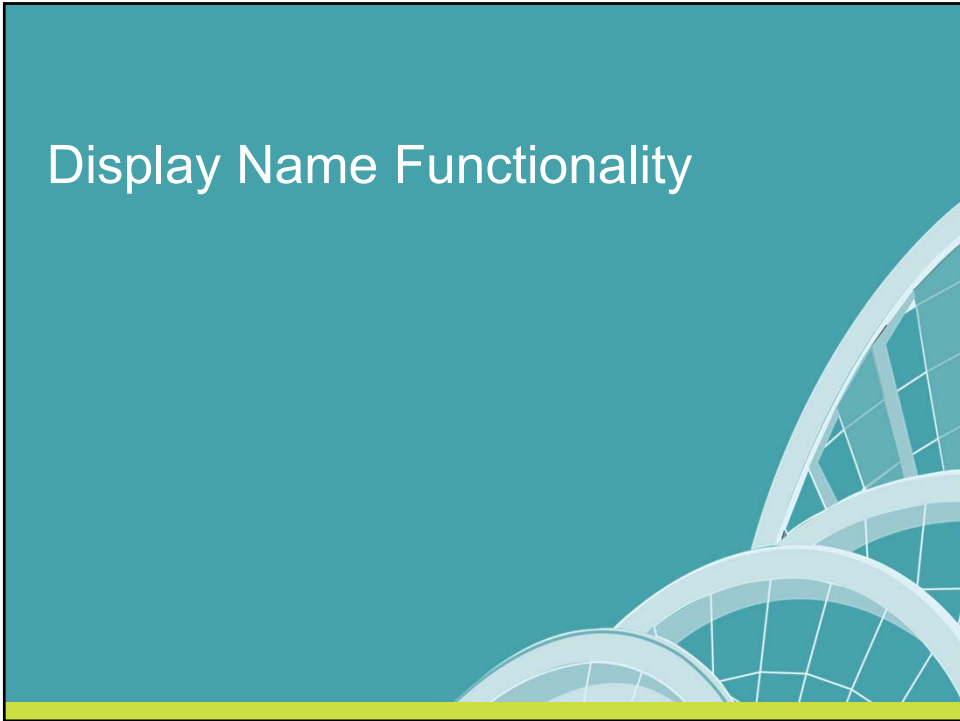
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Multilingual Support

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- **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**



Display Name Functionality

- Does not impact Banner 8/SSB 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.)

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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Display Name Functionality



X Name Display GUANDSP 9.3 (PPRD)

Single Name Rule

Usage Name: Active

Priority: Maximum Length:

Name Type: Error Message:

Comments:

Name Sequence

Name Prefix	<input type="text" value="1"/>	Name Prefix Length	<input type="text"/>
First Name	<input type="text" value="2"/>	First Name Length	<input type="text"/>
Middle Name	<input type="text" value="3"/>	Middle Name Length	<input type="text"/>
Surname Prefix	<input type="text" value="4"/>	Surname Prefix Length	<input type="text"/>
Last Name	<input type="text" value="5"/>	Last Name Length	<input type="text"/>
Name Suffix	<input type="text" value="6"/>	Name Suffix Length	<input type="text"/>
Legal Name	<input type="checkbox"/>	Legal Name Length	<input type="text"/>
Preferred Name	<input type="checkbox"/>	Preferred Name Length	<input type="text"/>

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Summary



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

Questions & Answers

**We want to hear from you—
feedback survey**

Access session surveys by using the survey widget on the mobile app or by logging into your session schedule builder.

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Thank you

**We want to hear from you—
feedback survey**

Access session surveys by using the survey widget on the mobile app or by logging into your session schedule builder.

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