



# Banner Admin Navigation: Tips and Tricks

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# 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

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**2** Application Navigator and the Main Menu

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**3** Terminology and Parts of a Page

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**4** Notification Center and Help

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**5** Name Search

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**6** Other Tidbits

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**7** Data Export

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**8** Queries

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**9** Shortcut Keys

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**10** Multi-lingual support

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**11** Job Submission

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**12** Name Display

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**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.**

# Application Navigator 3.2

## Personal Settings/Preferences (access via the profile icon onAppNavmenu)

- Direct access vs Search default
- Confirm logout vs no confirmation
- Define page to auto open at log in

## Favorites Feature

- Ability to add or remove Banner Admin/SSB9/Page Builder pages to the new Favorites menu folder

# Application Navigator 3.2

## Direct Access Navigation Feature

### Menu Improvements

- New column on GUAOBSJS
- Improvements to menu build logic –Target is easy to manage and understand

### Menu Management Improvements

- Leverage GUACONF for Groovy file content –any remaining items





Dashboard

Applications

Search

Recently Opened

Help

Favorites

Sign Out

Mrs. Kimberly Melissa Van Johnson

Ellucian Database

Prod Core 9.3.x - Morphis 1.6 Framework

Release: 3.2

# Welcome

System Test 3.2

Direct Navigation



Back to Applications

Population Selection (\*GENPOPSEL)

Population Selection Extract Inquiry (GLIEXTR) ☆

Population Selection Extract Data (GLAEXTR) ☆

Population Selection Definition Rules (GLRSLCT) ☆

Population Selection Inquiry (GLISLCT) ☆

Application Definition Rules (GLRAPPL) ☆

Application Inquiry (GLIAPPL) ☆

Variable Rules Definitions (GLRVRBL) ☆

Variable Inquiry (GLIVRBL) ☆



Back to Main Menu

Favorites

Academic Degree and Honors (APADEG) ☆

Advancement Individual Information (APACONS) ☆

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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

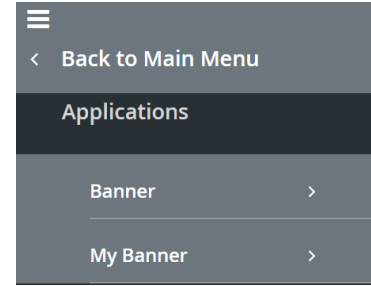
- When using GUAPMNU, you can “rename” objects and they are unique to the My Banner setup. This does not rename objects in the system

## GUAOBS/GUTGMNU: Create Subfolders

- 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, \*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

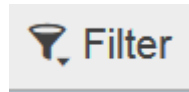


- Alt Page Up

- **Rollback = Start Over**



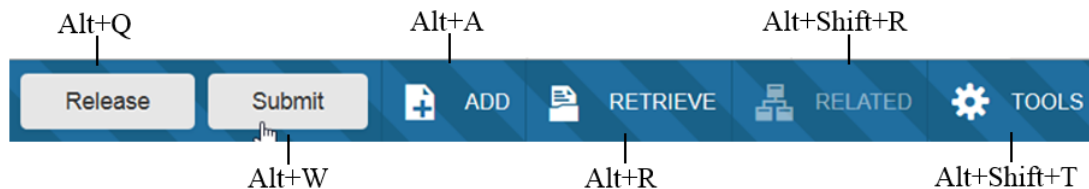
- **Query = Filter**



# 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

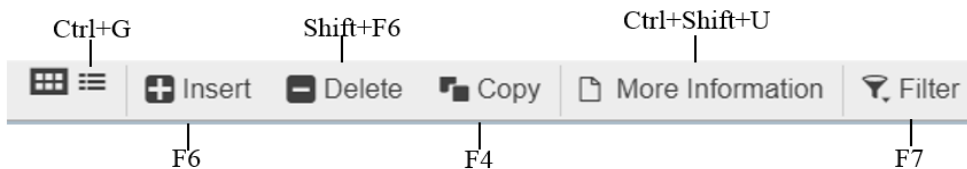
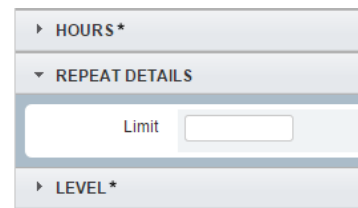


- **Key Block**

- 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

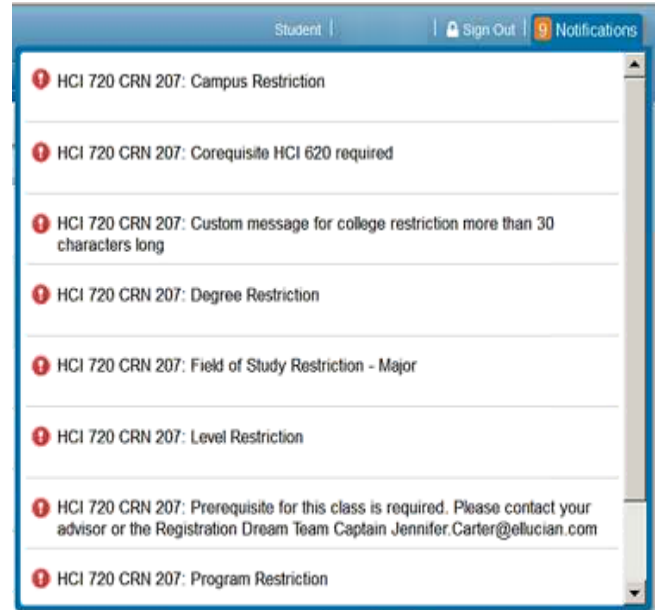
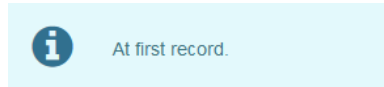
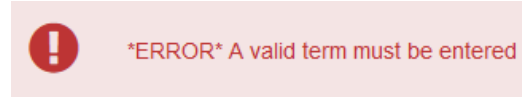
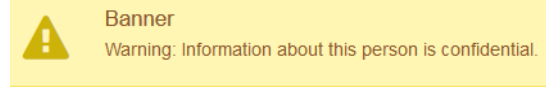
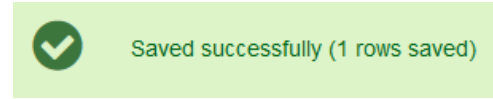
## Types of Information that is Displayed

- 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



# 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:  ... +

- Format is Last Name, First Name, Middle Name aka Trepex%, 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 butto  
above to reset back to original count

**ID and Name Extended Search**

Search Detail

Person/Non-Person Count 14

Reduce Search By

Group Type  Person  Non-Person  Both

City

State or Province  ...

ZIP or Postal Code  ...

Name Type  ...

Birth Date

Gender

SSN/SIN/TIN

Press Enter Query or select button to clear search.

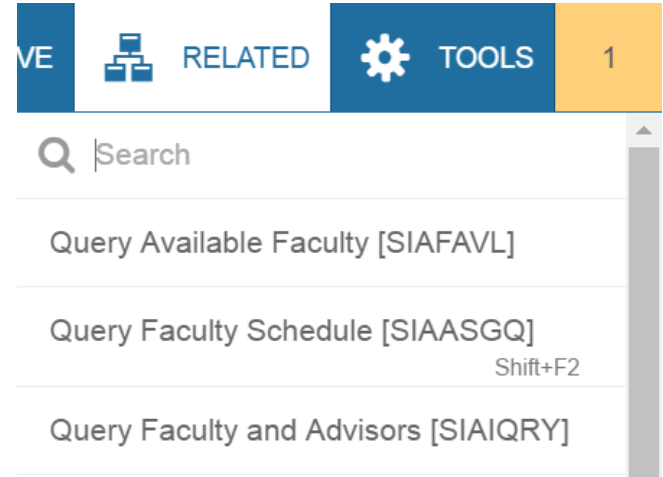
Enter search criteria then press Execute Query or select button to reduce search.



# 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.



# Other Tidbits

Required fields have \*



A screenshot of a search form with two input fields. The first field is labeled 'Term \*' and the second is labeled 'CRN \*'. Both fields have a small '...' icon to their right, indicating they are required or have a dropdown menu.

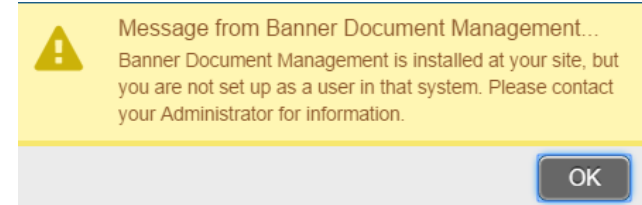
Look up = F9 = List of Values = LOV



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

Ellucian University

Wayman, Willard Sign Out

Detail Code Control Form - Student TSAETC 9.3 (Core-PRD)

ADD RETRIEVE RELATED TOOLS

DETAIL CODE CONTROL FORM - STUDENT

Insert Delete Copy Filter

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 Ye
00LL	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"/>	<input type="checkbox"/>
00LX	test													
00SS	shweta													
015	Test Tuition													
0A	Test 0A													
QAAA	EP test													
QTV	TV													
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													

Ellucian University

User RKS Sign Out

Detail Code Control Form - Student TSAETC 9.3 (Core-PRD)

ADD RETRIEVE RELATED TOOLS

DETAIL CODE CONTROL FORM - STUDENT

Insert Delete Copy Filter

Detail Code: 0001 Undergraduate Tuition

Type: C

Category: TUI

Grant Type: None

Priority: 999

Refund Code: None

Direct Deposit

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

Defaults

Default Amount: 900.00

Default Term: 201110

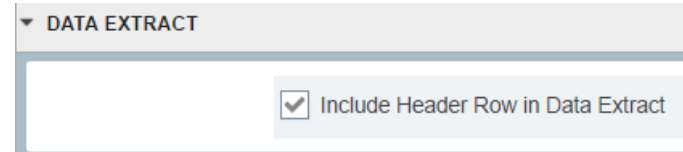
Default Effective Date:

SAVE

Ellucian 19

# 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 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



DATA EXTRACT

Include Header Row in Data Extract

GURUPRF USER ID	GURUPRF GROUP	GURUPRF KEY	GURUPRF STRING	GURUPRF VALUE
SAISUSR or possibly BASELINE	DATA_EXTRACT	WIN32COMMON	PROMPTS	Y

# Inquiry vs Query Pages

## Inquiry 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.

## Query 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)**

# Basic Filtering

The screenshot displays the 'Person Search SOAIDEN 8.5.6 (C800)' application window. At the top, there are input fields for 'ID', 'Last Name', 'First Name', 'Middle Name', 'Birth Date', 'Change Indicator', and 'Type'. Below this is a navigation bar for 'Person Search SOAIDEN 9.3.11 (TEST)' with buttons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. A green notification box states 'Enter a query; press F8 to execute.' The main search area includes a 'Basic Filter' section with fields for 'ID', 'Last Name', 'First Name', 'Middle Name', and 'Change Indicator', along with an 'Add Another Field ...' button. At the bottom, a table header is visible with columns: 'ID', 'Last Name', 'First Name', 'Middle Name', 'Birth Date', 'Change Indicator', 'Prefix', 'Suffix', and 'Nan'. Below the table header, two radio buttons are present: 'Case Insensitive Query' (which is selected and circled in purple) and 'Case Sensitive Query'.

# Advanced Filtering

Person Search SOAIDEN 9.3.11 (TEST)

ADD RETRIEVE RELATED TOOLS 1

PERSON SEARCH

Basic Filter Advanced Filter

Enter a query; press F8 to execute.

Equals

- Contains
- Like
- Starts With
- Ends With
- Equals
- Not Equal

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	Nan
----	-----------	------------	-------------	------------	------------------	--------	--------	-----

Case Insensitive Query  Case Sensitive Query



# 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 ...

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	Nan
----	-----------	------------	-------------	------------	------------------	--------	--------	-----

Case Insensitive Query  Case Sensitive Query

# Queries

Enter Query = F7 = F7

Execute Query = F8 = F8

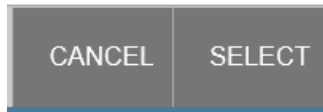
Last Criteria = F7/F7 = auto

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



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

5 of 25 | Per Page

Case Insensitive Query  Case Sensitive Query

10  
10  
20  
30  
40  
50

# Movable Columns

Detail Transaction Activity FGTRND 9 2.2 (Core-FRO)

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

DETAIL TRANSACTION ACTIVITY

Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Department *				
7210	11001	10	YTD	1,345.00	+	INN	AAA P...	Inc Corp		10002062	U
5210	11001	23	YTD	1,500.00	+	GRRV	ATT			10007099	U
7589	11001	23	YTD	-49.77	-	ORIR	ATT			10002102	U
7500	11001	23	YTD	192.39	+	ORIC	ATT			10002102	U
7220	11001	30	ENC	14,948.75	+	PCRD	ATT			LM201	U
7220	11001	30	ENC	120.00	+	PCRD	ATT			P0002261	U
7210	11001	23	YTD	1,285.95	+	INN	ATT			10002102	U

# Feature Functionality Deliverables

## User Preferences for Admin allows for the persistence of:

- Filter – manage default fields and values
- Grid/Column – manage column order, column size
- Pagination – manage number of records displayed

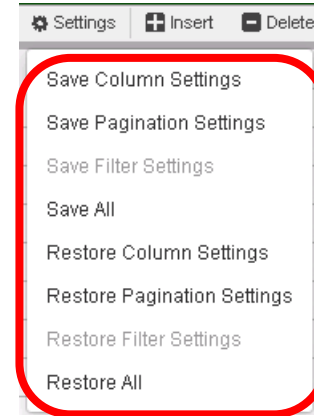
## Each user can establish their own profile and maintain it as needed

- Take it on the go, responsive design allows for User Preferences use on a tablet
- Supports the global market
  - Arabic, English Australian, English Great Britain, English India, English Ireland, French, French Canadian, Portuguese, Spanish languages

# How Do I Know If User Preferences for Admin Is On?

If User Preferences for Admin is active for a page, you will see the **Settings** button in the collapsible panel for each section, block and tab of that page

- When On, the Settings button will be visible in the collapsible panel
- When Off, no Settings button will appear in the collapsible panel
- When pressed, the Settings button expands with actions



# Actions Available to All Users

## All users can:

- Control your own User Preferences for Admin settings without impacting others at the institution
  - You have the power to set grids, columns, filters and pagination to your liking!
- Save or Restore User Preferences at the section, block or tab levels of a page (Alt+1, Alt+2,...Alt+8 shortcuts available)
  - Restoring User Preferences can be done at the page level by using the Tools → Restore Default Settings option (Ctrl+Shift+Z shortcut available)
    - Note: The Restore Default Settings option impacts the full page; not just a specific section, block or tab

**The ability to save a User Preference is independent from the ability to perform a create, update, delete transaction**

**All security roles are eligible to leverage User Preferences functionality on both inquiry only and modifiable pages**

# Hierarchical Application of User Preferences Settings

**Applying and viewing User Preferences for Admin uses the following hierarchy:**

## **My own user settings**

- If the feature is on and the page is enabled; my personal preferences will display

## **Master user settings**

- If the feature is on and the page is enabled but I don't have personal user preferences applied; then I will see the preferences propagated to me by the Master user

## **Banner Admin page default settings**

- If the feature is on and the page is enabled but no user or Master preferences are applied; then I will see the page as delivered by Ellucian

# Grids and Columns Data Presentation

## Grid and Column preferences by section, block or tab – users can:

- Re-size column widths
  - Includes the ability to shrink columns where only the column border remains visible
- Re-order columns
  - When re-ordering columns, tab navigation follows the original order and business logic of the page, as delivered by Ellucian
- Column freeze/unfreeze
  - Re-order columns that you want to freeze or unfreeze
- Column header stays fixed for easy viewing
- Once changed, the column header will contain a blue highlight to easily track modifications

**Available on all page locations presenting a grid or column layout, including the Supplemental Data Engine (SDE) window**

**“Restore Column Settings” or “Restore All” – exit the page and reenter to refresh the display**



# Detail Transaction Activity (FGITRND) – Before

DETAIL TRANSACTION ACTIVITY														
Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Document *	Transaction Date *	Activity Date *	Description	Commit Type	Fund *	Activity	Location
6111	11009	10	YTD	30.00	+	CR05	N0016946	07/01/2019	07/30/2019	Cash Receipt 1	U	G18471		
6111	11009	10	YTD	30.00	+	CR05	N0016947	07/01/2019	07/30/2019	Cash Receipt 1	U	G18472		
6111	11009	10	YTD	30.00	+	CR05	N0016948	07/01/2019	07/30/2019	Cash Receipt 1	U	G18473		
6111	11009	10	YTD	30.00	+	CR05	N0016941	07/01/2019	07/30/2019	Cash Receipt 1	U	G18466		
6111	11009	10	YTD	30.00	+	CR05	N0016942	07/01/2019	07/30/2019	Cash Receipt 1	U	G18467		
6111	11009	10	YTD	30.00	+	CR05	N0016943	07/01/2019	07/30/2019	Cash Receipt 1	U	G18468		
6111	11009	10	YTD	30.00	+	CR05	N0016944	07/01/2019	07/30/2019	Cash Receipt 1	U	G18469		
6111	11009	10	YTD	30.00	+	CR05	N0016945	07/01/2019	07/30/2019	Cash Receipt 1	U	G18470		
6111	11009	10	YTD	30.00	+	CR05	N0016937	07/01/2019	07/30/2019	Cash Receipt 1	U	G18462		
6111	11009	10	YTD	30.00	+	CR05	N0016938	07/01/2019	07/30/2019	Cash Receipt 1	U	G18463		
6111	11009	10	YTD	30.00	+	CR05	N0016939	07/01/2019	07/30/2019	Cash Receipt 1	U	G18464		
6111	11009	10	YTD	30.00	+	CR05	N0016940	07/01/2019	07/30/2019	Cash Receipt 1	U	G18465		
6111	11009	10	YTD	30.00	+	CR05	N0016932	07/01/2019	07/30/2019	Cash Receipt 1	U	G18457		
6111	11009	10	YTD	30.00	+	CR05	N0016933	07/01/2019	07/30/2019	Cash Receipt 1	U	G18458		
6111	11009	10	YTD	30.00	+	CR05	N0016934	07/01/2019	07/30/2019	Cash Receipt 1	U	G18459		
6111	11009	10	YTD	30.00	+	CR05	N0016935	07/01/2019	07/30/2019	Cash Receipt 1	U	G18460		
6111	11009	10	YTD	30.00	+	CR05	N0016936	07/01/2019	07/30/2019	Cash Receipt 1	U	G18461		
6111	11009	10	YTD	30.00	+	CR05	N0016927	07/01/2019	07/30/2019	Cash Receipt 1	U	G18452		
6111	11009	10	YTD	30.00	+	CR05	N0016928	07/01/2019	07/30/2019	Cash Receipt 1	U	G18453		
6111	11009	10	YTD	30.00	+	CR05	N0016929	07/01/2019	07/30/2019	Cash Receipt 1	U	G18454		
				<b>Total</b>	1,031,314.62	+								

# Detail Transaction Activity (FGITRND) – After

ellucian Detail Transaction Activity FGITRND 9.3.12 (Core-PRD) ADD RETRIEVE RELATED TOOLS

COA: B Fiscal Year: 20 Index: Fund: Organization: Account: Program: Activity: Location: Period: Commit Type: Both Start Over

DETAIL TRANSACTION ACTIVITY Settings Insert Delete Copy Filter

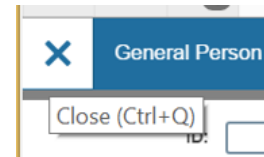
Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Document *	Type	Transaction Date *	Activity Date *	Description	Commit Type	Fund	Activity	Location
6111	11009	10	YTD	30.00	+	N0016946	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18471		
6111	11009	10	YTD	30.00	+	N0016947	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18472		
6111	11009	10	YTD	30.00	+	N0016948	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18473		
6111	11009	10	YTD	30.00	+	N0016941	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18476		
6111	11009	10	YTD	30.00	+	N0016942	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18477		
6111	11009	10	YTD	30.00	+	N0016943	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18478		
6111	11009	10	YTD	30.00	+	N0016944	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18479		
6111	11009	10	YTD	30.00	+	N0016945	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18480		
6111	11009	10	YTD	30.00	+	N0016937	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18482		
6111	11009	10	YTD	30.00	+	N0016938	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18483		
6111	11009	10	YTD	30.00	+	N0016939	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18484		
6111	11009	10	YTD	30.00	+	N0016940	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18485		
6111	11009	10	YTD	30.00	+	N0016932	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18487		
6111	11009	10	YTD	30.00	+	N0016933	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18488		
6111	11009	10	YTD	30.00	+	N0016934	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18489		
6111	11009	10	YTD	30.00	+	N0016935	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18490		
6111	11009	10	YTD	30.00	+	N0016936	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18491		
6111	11009	10	YTD	30.00	+	N0016927	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18492		
6111	11009	10	YTD	30.00	+	N0016928	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18493		
6111	11009	10	YTD	30.00	+	N0016929	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18494		
Total				1,031,314.62	+									

1 of 2773 20 Per Page Record 1 of 55445

# Shortcuts

Buttons display shortcut with mouse-over

Command	Banner 8	Banner 9
<b>Save</b>	<b>F10</b>	<b>F10</b>
<b>Rollback/Start Over</b>	<b>Shift+F7</b>	<b>F5</b>
<b>Quit/Close</b>	<b>Ctrl+Q</b>	<b>Ctrl+Q</b>
List of Values/Lookup	F9	F9
Log Out of Banner	Ctrl+Q	Ctrl+Shift+F
<b>Next Block/Next Section; Go</b>	<b>Ctrl+PgDwn</b>	<b>Alt+PgDwn</b>
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

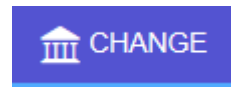
<u>Command</u>	<u>Banner 8</u>	<u>Banner 9</u>
<u>Go To: Search</u>	<u>F5</u>	<u>Ctrl+Shift+Y</u>
<u>Go To: Recently Opened</u>	<u>F5+Up/Down</u>	<u>Ctrl+Y+Up/Down</u>
<u>Forms with Tabs direct to Tab</u>	<u>F2</u>	<u>Ctrl+Shift+1, 2, 3, 4</u>
Enter Query/Filter	F7	F7
Execute Query/Go (on Filter)	F8	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

<u>Command</u>	<u>Banner 8</u>	<u>Banner 9</u>
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

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



# 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**

Active

Priority \*

Maximum Length \*

Name Type \*  ...

Error Message

Comments

### Name Sequence

Name Prefix

Name Prefix Length

First Name

First Name Length

Middle Name

Surname Prefix

Last Name

Name Suffix

Legal Name

Preferred Name

#### Literal Sequence

Literal 1	<input type="text" value="3"/>	Literal 1 Value	<input type="text" value="[]"/>
Literal 2	<input type="text"/>	Literal 2 Value	<input type="text"/>
Literal 3	<input type="text"/>	Literal 3 Value	<input type="text"/>
Literal 4	<input type="text"/>	Literal 4 Value	<input type="text"/>
Literal 5	<input type="text"/>	Literal 5 Value	<input type="text"/>
Literal 6	<input type="text"/>	Literal 6 Value	<input type="text"/>

# 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: GUI SRCH

Search for ID using Email or Phone or Additional ID values

Settings on GTVADID limit which ADID codes can be searched

General Search GUI SRCH 9.3 (PPRD)

ADD

RETRIEVE

RELATED

TOOLS

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

Start Over

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

GENERAL SEARCH

Insert Delete Copy Filter

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**
- **New User Preferences**
- **Shortcuts**



Thank you.

**KIMBERLY JOHNSON**

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