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Introduction

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

#1 Best Feature
#1 Best Feature

- 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.

Application Navigator and the Main Menu
Application Navigator

• 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

Main Menu Tricks

• 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.
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

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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 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

- **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
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
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
  - SDE fields Exist but are empty
  - SDE fields have data

Other Tidbits:

**Single Record / Multiple Record Toggle**

= Ctrl + G
Other Tidbits:
Single Record / Multiple Record Toggle

Data Export
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

Queries

Things you didn’t know you didn’t know
Queries

- % 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

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
Queries

- Query = Filter
- Execute = Go

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.
# Shortcut Keystrokes

## 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>
<tr>
<td>Next Block/Next Section; Go</td>
<td>Ctrl+PgDwn</td>
<td>Alt+PgDwn</td>
</tr>
<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>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>
</tbody>
</table>
### Shortcuts

<table>
<thead>
<tr>
<th>Command</th>
<th>Banner 8</th>
<th>Banner 9</th>
</tr>
</thead>
<tbody>
<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>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>
<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>

### Shortcuts: Complex Features

<table>
<thead>
<tr>
<th>Command</th>
<th>Banner 8</th>
<th>Banner 9</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>Alt+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>
Multilingual 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**
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.)

<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 Grade</td>
<td>Final Grds</td>
<td>Incomplete Grades</td>
<td>LFMI</td>
<td>2000</td>
</tr>
<tr>
<td>Student</td>
<td>Faculty Grade</td>
<td>Final Grds</td>
<td>Student Roster</td>
<td>LFMI</td>
<td>2000</td>
</tr>
<tr>
<td>Student</td>
<td>Faculty Grade</td>
<td>Final Grades</td>
<td></td>
<td></td>
<td>2000</td>
</tr>
</tbody>
</table>
Display Name Functionality

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

Summary
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.

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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Session ID 98165