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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
#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 GUAOBSJS 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
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

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
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 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

- `%` 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.
<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.)
Display Name Functionality

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.

Thank you

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Session ID 98165