



Banner Transformed
Getting Started With Your Administrative
Applications

Release 9.x
April 2018

Notices

© 2015-2018 Ellucian.

Contains confidential and proprietary information of Ellucian and its subsidiaries. Use of these materials is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.

In preparing and providing this publication, Ellucian is not rendering legal, accounting, or other similar professional services. Ellucian makes no claims that an institution's use of this publication or the software for which it is provided will guarantee compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting, and other similar professional services from competent providers of the organization's own choosing.

Ellucian
2003 Edmund Halley Drive
Reston, VA 20191
United States of America

Contents

Application Navigator.....	4
Basic Navigation.....	5
Page header.....	5
Key block.....	6
Sections.....	7
Buttons.....	7
Required fields.....	8
Sort order.....	9
Dates.....	9
Lookup.....	9
Filtering data.....	10
Advanced filter.....	10
Basic Filter.....	12
Help.....	13
Multiple records.....	13
Page Layout.....	15
Print.....	15
Advanced features.....	16
Supplemental Data Engine.....	16
Multi-Entity Processing.....	16
Institution assignments.....	17
Data masking.....	18
Data export.....	18
Item properties.....	18
Banner keyboard shortcuts.....	18

Application Navigator

Application Navigator uses single sign on to provide access to transformed pages and Internet Native Banner (INB) forms during the transition from Oracle forms to Java based applications. Application Navigator is used to access all Banner administrative applications, regardless of the architecture.

Sign in using the URL to access the page and use the credentials provided by your institution to access Application Navigator. You can then use any of the following to navigate within Application Navigator:

- The **Menu** icon is a group of three horizontal lines at the top left of the page. It indicates the main menu. Clicking this icon will display or hide the names of the Application Navigator icons. Click the **Menu** icon or the **Back to Main Menu** link to display the main menu on any screen.
- The **Dashboard** icon is indicated by a home image. Click this icon to return to the landing page from any screen.
- The **Applications** icon is indicated by 9 small boxes in a grid of 3 by 3. This icon is used to display the **Banner**, **My Banner**, and **Banner Self-Service** menus, in addition to menus for any other integrated applications such as Banner 9 Registration.
- The **Search** icon, indicated by a magnifying glass, can be used to find pages or forms using key words or the seven letter object identifier for the form or page. This search is performed on the menu data, therefore if the form or page is not included on the menu, it is not included in the search results.
- The **Recently Opened** icon is indicated by an open file folder. When a new page is opened, the number attached to the folder increases by one. When selected, the recently opened icon displays a list of the recently opened forms and pages.
- The **Help** icon, indicated by a question mark, displays the online help for Banner 9 administrative applications. Online help is also available for Banner 8.x Self-Service.
- The **Sign Out** icon, indicated by a lock, is used to log out of Application Navigator.
- The landing page contains a search field which can be used to search for forms, pages, jobs, menus, and quickflows. If a form or page is selected, that form or page will open. If a menu item is selected from the landing page search results, the menu panel will open and the selected menu will be displayed. When an item is selected from the search results, the search results list is cleared.

If a Banner page has not yet been transformed, the page will automatically open in Oracle forms. This enables you to continue to do your job, regardless of the page or form you need to access, without signing into different applications.

Application Navigator has a set of keyboard shortcuts, which you can review by clicking on **Keyboard Shortcuts** in the bottom right corner of the page. See [Banner keyboard shortcuts](#) on page 18 for more information about the Application Navigator keyboard shortcuts.

It is important to remember to use the **Sign Out** link when closing the application instead of just closing your browser to make sure you are logged out of the application.

Basic Navigation

The basic navigation of each page includes the page header, notification center, key block, sections, and buttons.

Page header

The page header is part of the basic navigation.

The page header contains the following items:

- Page close icon
- Page title, which is formatted according to the preferences established on the User Preference (GUAUPRF) page.
- **Release** and **Submit** buttons, which are used only with a workflow.
- **Add** and **Retrieve** icons, which are used with Banner Document Management.

- Related Menu, which displays a list of pages that can be accessed from this page. These are defined on the Options Maintenance Menu (GUAOPTM) page.
- Tools Menu, which includes refresh, export, print, clear record, clear data, item properties, display ID image, page layout, and other options controlled by the page.
- Notification Center.

The Notification Center is located to the right of the **Tools** menu and displays the following types of information as needed:

- Successful save of data
- Warning messages
- Error messages
- Informational messages
- Number of messages to be corrected to continue in the page

You can click in the box with the number in the page header to open or close the Notification Center.

Key block

The first block on most pages contains key information.

The key block determines what data is entered or displayed on the rest of the page. All the information on the page is related to the key block. The key block stays on the page as subsequent sections are displayed.

When the cursor is in the key block, the fields that can be entered in the key block are enabled. When you leave the key block, the fields in the key block are disabled.

When the cursor is in the key block, the information is displayed in a column format. When you leave the key block by clicking the **Go** button, the data is rearranged into a linear format.

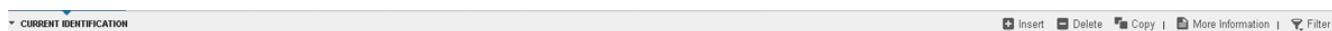
To access the body of the page, populate the key block data and then click **Go**.

You can return to the key block if you are in the body of a page by clicking **Start Over**.

The screenshot shows a software interface with a blue header bar. The header bar contains the text "Employee Jobs NBAJOBS 9.0 (GVUDB)" on the left and navigation icons for "ADD", "RETRIEVE", "RELATED", and "TOOLS" on the right. Below the header bar, there are four input fields: "ID:" with a text box and a dropdown arrow, "Suffix:" with a text box and a dropdown arrow, "Position:" with a text box and a dropdown arrow, and "Query Date:" with a date picker showing "10/20/2015". A green "Go" button is located to the right of the "Query Date" field. Below the input fields, there is a grey bar with the text "Get Started. Fill out the fields above and press Go."

Sections

Pages are divided into sections that contain additional details for the key information. A section can represent one record or multiple records depending on the type of information that you are working on.



Each section contains related information.

Sections of data are accessed by scrolling up and down the page. They can be opened or collapsed by clicking on the arrow on the far left side of the section header. Some sections are accessed by using tabs that group information in a meaningful way.

If available, the sections can have a header that includes icons for the following actions:

- **Insert.** Use this to insert records in the section.
- **Delete.** Use this to delete records in the section.
- **Copy.** Use this to copy records in the section.
- **Filter.** Use this to filter records in the section.
- **More Information.** Use this if supplemental data can be entered for a section.

The **More Information** icon is displayed as a blank page if supplemental data can be entered for the record. The icon is displayed as a page with lines if supplemental data already exists for the record.

If supplemental data cannot be entered for a section, the icon is not displayed. Refer to *Supplemental Data Engine* for more details.

Buttons

Banner transformation includes several buttons.

Button	Description
Add and Retrieve	Use the Add and Retrieve buttons to interact with Banner Document Management to properly store and review documents. Additional document management functions can be found by opening the Tools menu and scrolling down the menu to the Banner Document Management section.
Go	Use the Go button to advance to the body of the page after populating the key block.

Button	Description
Release and Submit	Use the Release and Submit buttons to interact with Banner workflow to submit a page or to release a page from the work flow. These buttons only appear when you have accessed the workflow application, and selected a work flow to begin.
Save	Use the Save button to save changes on the page. The Save button is located on the bottom right side of the page.
Section Navigation	Use the Next Section button to navigate to the next section of data. Use the Previous Section button to navigate to the previous section of data. The Next Section and Previous Section buttons are located at the bottom left of each page.
Select and Cancel	Use the Select button to select and retrieve data from a called page to the current page. Use the Cancel button to return to the called page without retrieving any data. When you need to go to a secondary or called page to retrieve data, the Select and Cancel are presented at the bottom of the page.
Start Over	Use the Start Over button to return to the key block of the page.

Required fields

An asterisk (*) displayed next to a field name indicates that the field requires a value before you continue on the page.

The system uses the definition of the field as it is used in the application to determine if it is required. For fields that have conditional logic that determines whether they are required, the asterisk (*) is not displayed.

If you to leave a section or a page without entering information in a required field, the page notifies the individual in the Notification Center, requiring the user to perform some additional action.

Sort order


In a grid layout, values for a field can be sorted, and if you have chosen to sort the data, an up or down arrow next to the field name indicates the current sort order for the field. You can click the field label to reverse the sort order.

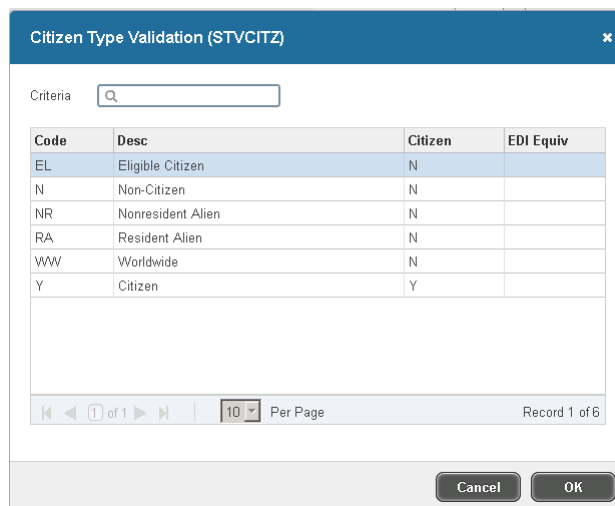
Dates

The transformed Banner application has settings to determine how dates are entered and displayed. You can enter either enter the date directly or use the calendar icon for date selection.

Lookup

The Lookup feature allows you to quickly look up a value for a field.

The **Lookup** button  next to a field indicates that the field has the Lookup feature. Click the **Lookup** button, enter a filter value, and press **Enter** to display results that match the filter criteria. Select a value and click **OK**, or double-click a value to return the value to the calling page.



Citizen Type Validation (STVCITZ)

Criteria

Code	Desc	Citizen	EDI Equiv
EL	Eligible Citizen	N	
N	Non-Citizen	N	
NR	Nonresident Alien	N	
RA	Resident Alien	N	
WW	Worldwide	N	
Y	Citizen	Y	

1 of 1 Per Page Record 1 of 6

Cancel OK

Filtering data

You can filter data in a section if there is an active **Filter** icon in the section header.

You can filter data using the Basic and Advanced filter options. You can switch between the two filter options at anytime and the search fields will maintain the field values and filter criteria that you specify.


Advanced filter

Use **Advanced Filter** to specify filter data using SQL type operators.

Procedure

1. Click the active **Filter** icon for the section.
The Basic Filter panel displays. This is the default filter panel that opens.
2. Select **Advanced Filter** to switch to advanced filter mode.

By default, the filter panel displays the first five fields in the key block.

3. **Optional:** Add and remove fields from the filter criteria.
 - a) To add a field, select the field from the **Add Another Field** drop-down list.
 - b) To remove a field, select  on the right side of the filter panel or select **Clear All** to remove all fields.
4. Choose an operator from the **Equals** drop-down list.
The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).
The Equals and Contains operators are available for alphanumeric and other fields only. The Between operator includes the values entered. For example, for codes “between” 1 and 5, the values 1, 2, 3, 4, and 5 are considered. Required fields do not use the Is Null and Is Not Null operators.
5. Enter a value for each field of the filter criteria that you select.

Where applicable, you can click the LOV button to select a value from the list that appears.

6. **Optional:** Switch to Basic Filter by clicking **Basic Filter**.

This switches the filter panel to Basic mode and retains the filter criteria that you previously specified.

The operator that you select in Advanced Filter mode converts to the appropriate Basic operator as shown in the table below.

Advanced Operator	Basic Operator
Contains	%A%
Starts With	A%
Ends With	%A
Not Equal	<> A
Not Equal or IS NULL	#IS NULL #OR <>
IS NULL	#IS NULL
IS NOT NULL	#IS NOT NULL
Identical to Contains, Start With and Ends With	#Like

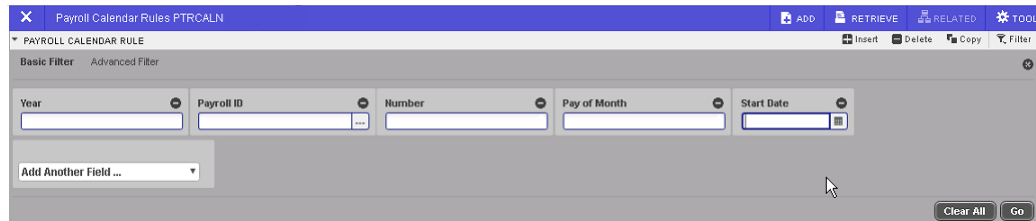
7. After you enter all filter criteria, click **Go** to display the filter results.
The number of records retrieved displays at the bottom of the section. You can sort the results for a field in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.
8. **Optional:** If you want to perform another filter, click **Filter Again**.
9. **Optional:** If you want to close the filter and display all unfiltered records, click the lowercase **x** in the upper right corner of the filter window to close the filter.

Basic Filter


Use **Basic Filter** to specify filter data using a customized list of search fields that provides a quick and simple way to enter a value into a field.

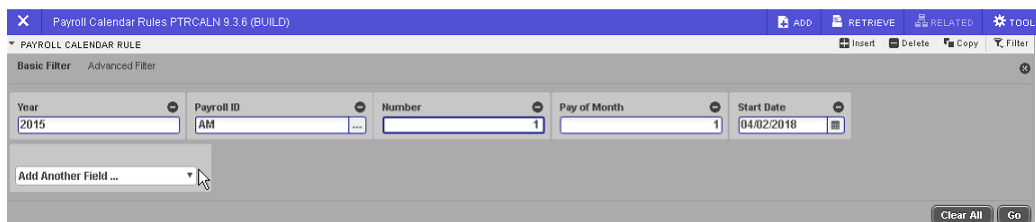
Procedure

1. Click the active **Filter** icon for the section.



The Basic Filter panel is the default filter and it displays the first five fields in the key block.

2. **Optional:** Add and remove fields from the filter criteria.
 - a) To add a field, select the field from the **Add Another Field** drop-down list.
 - b) To remove a field, select  on the top right side of the filter panel or select **Clear All** to remove all fields.
3. Enter a value for each field of the filter criteria that you select.



Where applicable, you can click the LOV button to select a value from the list that appears.

You can use the following Basic operators when entering values into text fields.

Basic Operator	Advanced Operator
%A%	Contains
A%	Starts With
%A	Ends With
<> A	Not Equal
#IS NULL #OR <>	Not Equal or IS NULL
#IS NULL	IS NULL

Basic Operator	Advanced Operator
#IS NOT NULL	IS NOT NULL
#Like	Identical to Contains, Start With and Ends With

4. **Optional:** Switch to Advanced Filter by clicking **Advanced Filter**.
This switches the filter panel to Advanced mode and retains the filter criteria that you previously specified.
The operator that you select in Basic Filter mode converts to the appropriate Advanced operator as shown in the table above.
5. After you enter all filter criteria, click **Go** to display the filter results.
The number of records retrieved displays at the bottom of the section. You can sort the results for a field in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.
6. **Optional:** If you want to perform another filter, click **Filter Again**.
7. **Optional:** If you want to close the filter and display all unfiltered records, click the lowercase **x** in the upper right corner of the filter window to close the filter.

Help

Application Navigator provides online help for pages.

Click on the question mark in the Application Navigator header to open the help for the page in context. You can perform various actions in the help suite. For example, you can search for topics or print the information.

Help is translated into Spanish. If you set your browser locale language to be Spanish and open the help file, it will be presented to you in Spanish.

Multiple records

Data can exist in multiple records of the same type in the database, for example addresses, are displayed in multiple ways.

Records can be viewed two different ways:

- **One record at a time.** In this instance, the details of the data are not displayed in a table grid, but rather in a more easily readable manner. You can move from record to record using pagination controls.

Production Test - Core

Identification PPAIDEN 9.0 (Core-PRD)

Dr: 71000023 Dr. Gerald James LNPrefix Goodhart

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

DETAILS

From Date: 01/01/1990 To Date: Address Type: BU Business Sequence Number: 3 House Number: Street Line 1: 11 1st Street Street Line 2: 22 2nd St Street Line 3: 33 3rd Street Street Line 4: 444 4th Street City: Malvern State or Province: PA Pennsylvania ZIP or Postal Code: 19355

County: Nation: US United States Telephone Type: BU Business or work Country Code: Area Code: 610 Phone Number: 5785545 Extension: Inactivate Address: Source: WEB Delivery Point: Correction Digit: Carrier Route:

Activity Date: 09/25/2015 12:55:58 PM Activity User: PLEICHLJ

EDIT Record: 114 sPRACDR.sPRACDR_FROM_DATE (1)

- **In a grid.** In this instance the data is presented in column and row format. You may need to scroll to view all the data. You can page through the records using the pagination controls (first, last, next, previous, or specific page number), decide how many records you want to review in the grid, and sort the data in ascending or descending order.

Production Test - Core

Electronic Approval Category Code Validation NTVACAT 9.0 (Core-PRD)

ELECTRONIC APPROVAL CATEGORY CODE VALIDATION

Approval Category Code *	Description *	Self-Service Description	Self Service Display Sequence
PAIDC	Two Addresses Testing		19
A1	Test 11		
ADDR	Address Info	Address Information	3
ADDTEL	Address and Telephone changes	Address and Telephone Changes	4
ALL	All fields		
APTEST	test defaults		120
BBADJ	BBates Adjunct Contract		21
BBJOB	BBates Multiple Job Changes		22
BHIRE	Benefits NEW Hire	Benefits New Hire	29
BIOG	Biographic Info	Biographic Info	402
CDW	CDW Test	CDW Test	
CDW1	Test Job Date Override	Test Job Date Override	33
EADDR	Moving - Stop/Start address		34
EARN	Default Earnings for EPAF	Default Earnings for EPAF	404
EATEST	test no fields		
EMCG	Employment Chg - non func		
EMHIRE	New Employee Hire/Job		5
EMPJOB	Employee aand Job Change	Employee and Job Change	122
EMPL	Change/Update Employee Record		24
ERLB	Earnings and Labor	Default Earnings and Labor Distribution	18

Record 1 of 67

Page Layout

You can toggle between Compact page layout (default) or Expanded page layout by selecting the page layout option on the Tools menu

There are two different page layout options to choose from.

- Compact (default)

This layout reduces the amount of excessive white space on pages and increases the amount of information visible on a page, limiting the need to scroll vertically.

- Expanded

This layout displays pages with increased white space and reduces the amount of information visible on a page. This may result in the need to scroll to see all of the information.

You can switch between Compact page layout and Expanded page layout by clicking **Tools > Page Layout** and selecting either **Expanded** or **Compact**. The page layout that you select remains active for your browser session. When you close your browser, the page layout reverts to the default **Compact** the next time you open a new browser session and log in to Application Navigator.

Print

Printing is most effective when using the Compact Page layout.

Compact Page layout provides for the best fixed width printing ratio. You can reorder columns to move the most important data to appear first and ensure that these columns are visible on the printed page.

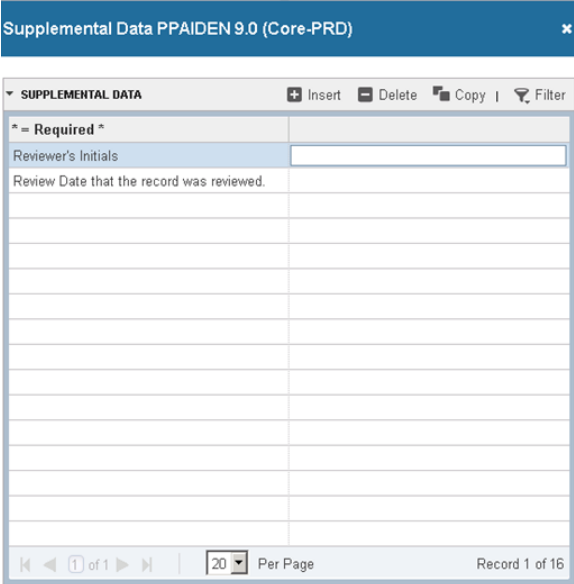
Advanced features

There are several advanced features that can be used with Banner Transformation.

Supplemental Data Engine

The Supplemental Data Engine (SDE) allows you to store data that is not part of the Banner data model. The data is displayed in the More Information window.

If supplemental data exists for a section of a page, the **More Information** button is displayed in the section header. The **More Information** window is where information can be viewed, edited, or added. When information is added or changed, you are prompted to save the changes. You can continue to work on the primary page.



Enter reviewer's initials -max 3 chars.

Multi-Entity Processing

You can use Multi-Entity Processing (MEP) to select which MEP you want to view.

For example, you can set up Banner with two institution codes: South Campus and North Campus.

Set Institution Code

Code	Description
SOUTH	South Campus
NORTH	North Campus

Select

User is assigned to both institution codes.

When the user signs into Application Navigator and enters a page name or description in the **Search for** box, the Multi-Entity Processing window shows both institution codes.

The user can take one of the following actions:

- Select one of the institutions, click **Select**, and continue to the page. The page header displays the assigned institution.
- Not select an institution, click **Select**, be signed into the default institution, and continue to the page. The page header displays the assigned institution.

The first institution displayed is the default institution for the user. A user can only have one default institution.

User is assigned to one institution.

When the user signs in, the user is automatically signed in to the assigned institution. The page header displays the assigned institution.

User is not assigned to any institution.

When the user signs in, the user is automatically signed in to the default institution. The page header displays the assigned institution.

Institution assignments

The Oracle/Banner VPD Security Maintenance (GSAVPDI) page displays institution information.

You can view your institution information on the following tabs:

- The **Institution Codes** tab shows the institution codes that are defined for an installation. The **System Default** indicator identifies the default institution.
- The **User Assignment** tab shows all users, their institution assignments, and their default or home institution.

If your institution allows cross-institution viewing on specific pages, you can switch institutions without leaving the page. Refer to “How to Switch Between Institution Codes” in the *Multi-Entity*

Processing Implementation Guide in Ellucian Support Center. In transformed Banner, the **Change** icon is located in the top right corner of the page header.

Data masking

Data masking is used to partially or completely obscure data in selected fields. Data masking is defined using the existing Banner General Oracle forms, and works in the same manner as the Oracle forms.

Data export

You can export data from a transformed Banner page to an Excel spreadsheet (.xlsx) by clicking **Tools > Export**.

Item properties

Item Properties lists all properties for the field where the cursor is currently located.

Item properties include the field's internal database name, whether it is required, type of data (character or numeric), maximum length, and other characteristics of the field. The specific properties that are displayed depend on the type of field. To display Item Properties for a field, place the cursor in the field and select **Tools > Item Properties**.

Banner keyboard shortcuts

The following table lists the keyboard shortcuts that you can use to navigate through Banner versions 8 and 9. **Bold entries** indicate actions with keyboard combinations that are new or updated in Banner 9.

Action	Banner 8	Banner 9
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q	CTRL+Q
Change MEP Context	Not applicable	ALT+SHIFT+C
Choose/Submit	ENTER	ENTER
Clear All in Section	SHIFT+F5	SHIFT+F5
Clear One Record	SHIFT+F4	SHIFT+F4

Action	Banner 8	Banner 9
Clear Page or Start Over	SHIFT+F7	F5
Count Query	SHIFT+F2	SHIFT+F2
Delete Record	SHIFT+F6	SHIFT+F6
Down/Next Record	Down Arrow	Down Arrow
Duplicate Item	F3	F3
Duplicate Selected Record	F4	F4
Edit	CTRL+E	CTRL+E
Execute Filter Query	F8	F8
Exit	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down Field	Click field	ALT+Down Arrow
Export	Extract Data with Key or Extract Data no Key	SHIFT+F1
First Page	Not applicable	CTRL+Home
Insert/Create Record	F6	F6
Last Page	Not applicable	CTRL+End
List of Values	F9	F9
More Information	ALT+H	CTRL+SHIFT+U
Next Field or Item	TAB	TAB
Next Page Down	Page Down	Page Down
Next Section	CTRL+Page Down	ALT+Page Down
Open Menu Directly	F5	CTRL+M
Open Related Men	Not applicable	ALT+SHIFT+R
Open Tools Menu	Not applicable	ALT+SHIFT+T
Page Tab 1	Not applicable	CTRL+SHIFT+1
Page Tab 2		CTRL+SHIFT+2
and so on		and so on
Previous Field or Item	SHIFT + TAB	SHIFT + TAB
Previous Page Up	Page Up	Page Up
Previous Section	CTRL+Page Up	ALT+Page Up
Print	SHIFT+F8	CTRL+P

Action	Banner 8	Banner 9
Refresh or Rollback	SHIFT+F7	F5
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	SHIFT+F3	ALT+S
Toggle Multi/Single Records View	Not applicable	CTRL+G
Up/Previous record	Up Arrow	Up Arrow
Toggle Accessibility mode ON/OFF for current session	Not applicable	CTRL+B
Workflow		
Release Workflow	Icon or Menu	ALT+Q
Submit Workflow	Icon or Menu	ALT+W
Banner Document Management (BDM)		
Add BDM Documents	Icon or Menu	ALT+A
Retrieve BDM Documents	Icon or Menu	ALT+R
Application Navigator		
App Nav - Access Help	Banner 9 keyboard shortcuts for Application Navigator will work in Banner 8 if you are running Banner 8 with Application Navigator and have applied the keyboard shortcut configuration settings.	CTRL+SHIFT+L
App Nav - Application Menu		CTRL+M
App Nav - Dashboard/Home		CTRL+SHIFT+X
App Nav - Display Recently Opened Items		CTRL+Y
App Nav - Side Search		CTRL+SHIFT+Y
App Nav - Sign Out		CTRL+SHIFT+F