

ellucian[®]

Banner Transformed
Getting Started With Your Administrative
Applications

Release 9.0
October 2015

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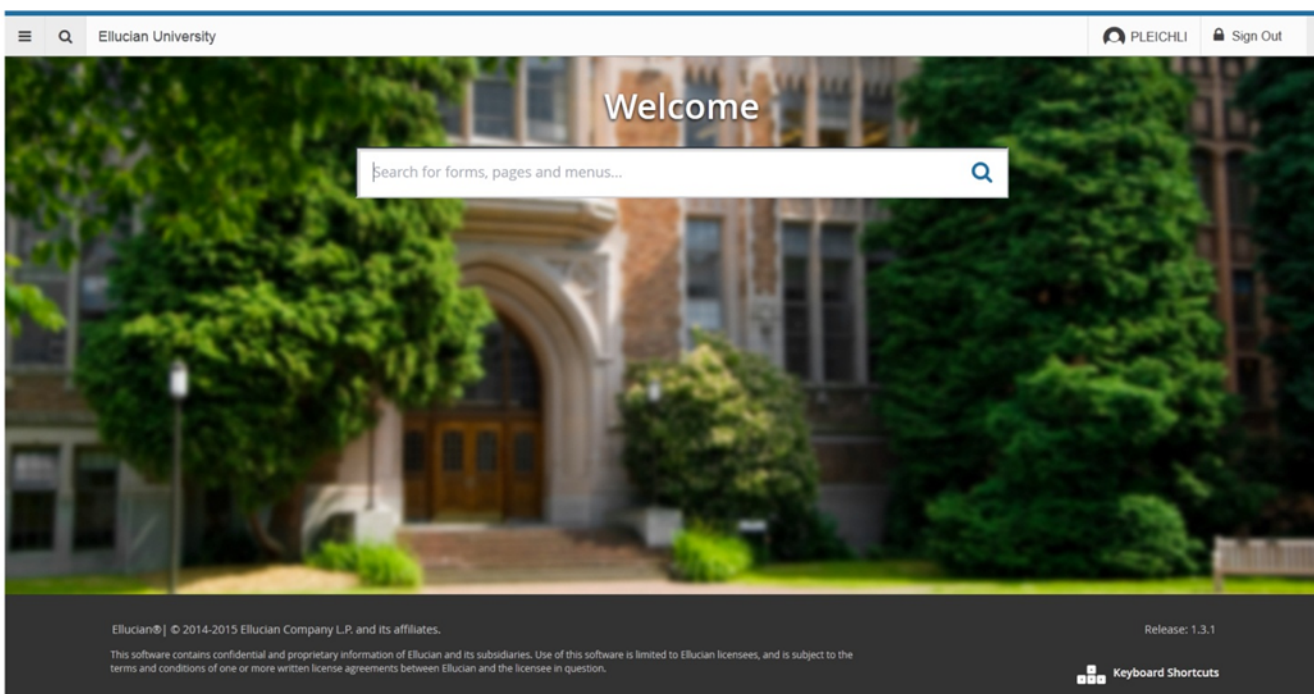
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Ellucian
4375 Fair Lakes Court
Fairfax, VA 22033
United States of America

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Application Navigator



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:

- **Menu icon.** The Menu icon is located in the upper left corner of the application. Click on this icon to open the Banner Menu. Find the page you are interested in opening. Select the desired entry and click **Enter**.
- **Search icon.** The Search icon is located in the upper left, just to the right of the Menu icon. Click on this icon to open the Search window. You can then enter either the descriptive name of the page or the Banner acronym for the page.
- **Recently Opened icon.** The Recently Opened icon is located in the upper left, just to the right of the Search icon. It is displayed with a count of pages after you have opened the first page in an application. Open the list and select a page to access it.
- **Search box in the center of the page.** In this box, you enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click **Enter**.

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.

You can return to the Application Navigator landing page by clicking on the home link. Your institution can name this link to be specific to your institution.

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.

It is important to remember to use the **Sign Out** link in the upper right corner 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.

The screenshot displays the 'Identification PPAIDEN 9.0 (GVUDB)' form. At the top, the page header shows 'Ellucian University' and user information 'PLEICHLI' with a 'Sign Out' button. The form is divided into several sections: 'CURRENT IDENTIFICATION' with fields for ID (71000002) and SSN/SIN/TIN (123456789); 'PERSON' with fields for Last Name Prefix (LNPrefix), Last Name (Goodhart), First Name (Gerald), Middle Name (James), Prefix (Dr.), Suffix (test), Preferred First Name (Gerry), Full Legal Name, and Marital Status (Happily Married); 'NON-PERSON' with a Name field; and 'ID AND NAME SOURCE' with fields for Last Update, Origin (Banner), and Original Creation. The bottom of the form shows 'Activity Date: 07/21/2015 03:34:13 PM' and 'Activity User: HRISUSR'. A 'SAVE' button is visible in the bottom right corner.

Page header

The page header is part of the basic navigation.

The screenshot shows the page header area. It includes a page close icon (X), the page title 'Identification PPAIDEN 9.0 (Core-PRD)', and navigation buttons: ADD, RETRIEVE, RELATED, and TOOLS. Below the header, there is an error message: '*ERROR* ID is invalid'.

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, 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 the top navigation bar of the 'Employee Jobs NBAJOBS 9.0 (GVUDB)' application. The navigation bar includes icons for ADD, RETRIEVE, RELATED, and TOOLS, along with a 'Go' button. Below the navigation bar, the key block contains the following fields:

- ID:
- Suffix:
- Position:
- Query Date:
- Last Paid Date:

A green 'Go' button is located to the right of the Query Date field. Below the key block, a grey bar contains 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 with lines if supplemental data can be entered for the record. The icon is displayed with a check mark 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.

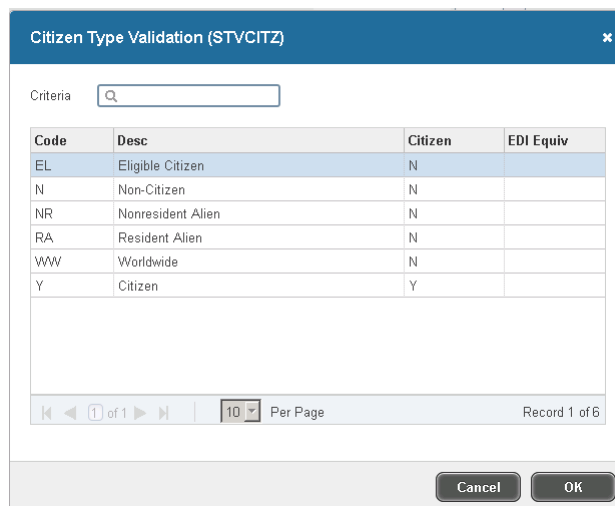
Dates

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	

10 Per Page Record 1 of 6

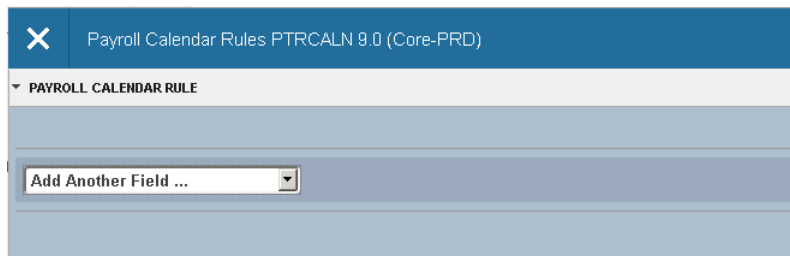
Cancel OK

Filtering data

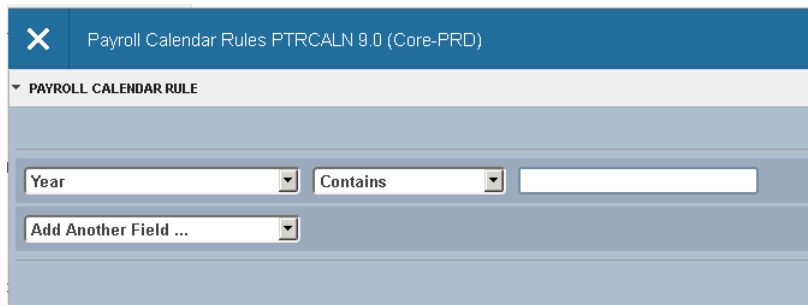
You can filter data in a section if there is an active **Filter** icon in the section header. Use the following steps to filter data in a section.

Procedure

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



2. Choose the field you want to filter from the **Add Another Field** drop-down list.



3. Choose an operator from the **Contains** drop-down list.
The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).
The Contains operator is 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.
4. Enter a value for the field that you selected.

5. **Optional:** If you want to add another field to the filter criteria, choose a field from the **Add Another Field** field, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.
6. When all filter criteria are entered, click **Go** to display the filter results.
The number of records retrieved is displayed at the bottom of the section. The results for a field can be sorted 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.
7. **Optional:** If you want to perform another filter, click **Filter Again**.
8. **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: PLEICHLI

EDIT Record: 1/4 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
PADDR	Two Addresses Testing		19
A1	Test 11		
ADDR	Address Info	Address Information	3
ADDTTEL	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

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

Record: 1 of 67

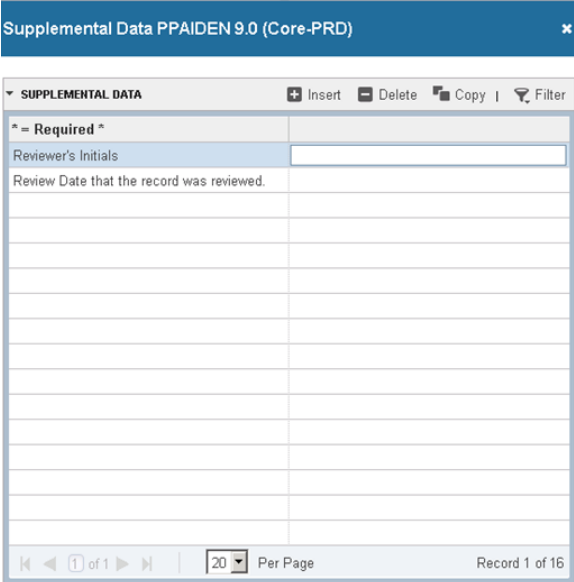
Advanced features

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.

Mutli-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 (.xls) 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**.

Keyboard shortcuts

You can customize key mappings at your institution. Oracle forms function keys such as Commit, List, Duplicate Item, and Edit are not used in Banner transformation.

Function	Key stroke
Next field/Item	Tab
Previous field/Item	Shift + Tab
Up	Up arrow
Down	Down arrow
Previous page up	Page up
Next page down	Page down
First page	Ctrl + Home

Function	Key stroke
Last page	Ctrl + End
Page tab 1, page tab 2	Ctrl + Shift +1, Ctrl + Shift +2, ...
Edit	Ctrl + E
Choose/Submit/Action	Return/Enter
List of values	F9
Cancel form, Exit, Close current page, Cancel search or query	Ctrl + Q
Save	F10
Clear One Record	Shift + F4
Delete Record	Shift + F6
Duplicate Selected Record	F4
Insert/Create Record	F6
Clear All in Section	Shift + F5
Open Menu Directly	Ctrl + M
Next Section	Alt + Page down
Previous Section	Alt + Page up
Duplicate Item	F3
Clear Page/Start over	F5
Search/Open Filter Query	F7
Execute Filter Query	F8
Export	Shift + F1
Print	Ctrl + P
Refresh/Rollback	F5
Change MEP Context	Alt + Shift + C
Open Related Menu	Alt + Shift + R
Open Tools Menu	Alt + Shift + T
More Information	Ctrl + Shift + U
Application Navigator Display Open items	Ctrl + Y
Application Navigator Search	Ctrl + Shift + Y
Application Navigator Help	Ctrl + Shift + L
Application Navigator Sign Out	Ctrl + Shift + F

Function	Key stroke
Copy	Ctrl + C
Cut	Ctrl + X
Paste	Ctrl + V
Undo	Ctrl + Z
Redo	Ctrl + Shift + Z
Cancel action	Esc
Select on a Called Form	Alt + S
Retrieve BDM Documents	Alt + R
Add BDM Documents	Alt + A
Submit Work flow	Alt + W
Release Work flow	Alt + Q
