

# Elucian

## Banner Solutions

**Get Started**

**June 16, 2025**

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# Get started using Administrative Applications

Updated: June 20, 2025

Learn about the Banner Administrative Applications User Interface (UI) including basic usability, navigation, and features describing the UI. More advanced functionality, such as the Supplemental Data Engine (SDE) and data masking, show their associated User Interface information and options when enabled.

## Application Navigator

Updated: August 27, 2020

Application Navigator allows you to navigate Banner modules using a single interface.

Application Navigator uses single sign on to provide access to Banner administrative applications and Banner Self-Service applications.

Use the Application Navigator URL to access the page and sign in using the credentials provided by your institution to access Application Navigator. You can then use any of the following options 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. Click this icon to 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 indicated by a home image, returns you to the landing page from any screen.
- The **Applications** icon indicated by 9 small boxes in a grid of 3 by 3 displays the **Banner**, **My Banner**, **My Links** and **Banner Self-Service** menus, in addition to menus for any other integrated applications such as Banner 9 Registration.
- Use the **Search** icon, indicated by a magnifying glass, to find pages or forms using key words or the seven letter object identifier for the page. This searches the menu data. Pages not included on the menu are not included in the search results. The **Search** option button searches objects based on three or more characters entered in the search box, whereas the **Direct Navigation** option requires entering the full object identifier in the search box. It does not attempt to auto-populate the search results.

- The **Recently Opened** icon is indicated by an open file folder. When you open a new page, 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 field-based reference help (also known as online help) for Banner 9 administrative applications.
- The **Application Navigator Keyboard Shortcuts** icon opens a modal window displaying all of the available Application Navigator keyboard shortcuts.
- The **Ellucian Privacy Policy** icon displays the privacy policy delivered with Ellucian products.
- The **Favorites** icon, indicated by a star image, opens the Favorites folder that displays your saved favorite pages and applications. From the Applications menu, select the star icon next to the application or page that you want to save to the Favorites folder. Select the star icon again to remove the page or application from the Favorites folder.
- The **Sign Out** icon, indicated by a lock, logs you out of Application Navigator.
- The landing page contains a search field that you can use to search for forms, pages, jobs, menus, and quick-flows. Selecting a form or page opens the selected form or page. 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.  
When using the **Search** option button, Application Navigator searches and returns results based on three or more characters entered in the search box, whereas the **Direct Navigation** option requires entering the full object identifier in the search box. It does not attempt to auto-populate the search results.

It is important 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.

Below the **Sign Out** icon, Application Navigator displays the user logged into the application in addition to the date and time the user logged in last.

The bottom of the Application Navigator side-bar displays the name of the environment logged into with the release of Application Navigator installed and deployed.

The **Institution Privacy Policy**, if configured, provides a direct link to the institutions privacy policy statement.

Related reference

- [Banner keyboard shortcuts](#)

Navigation

Updated: August 27, 2020

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

Ellucian University

PLEICHLI Sign Out ?

Identification PPAIDEN 9.0 (GVUDB)

ADD RETRIEVE RELATED TOOLS

ID: 710000023 Dr. Gerald James LNPrefix Goodhart, test

Start Over

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

CURRENT IDENTIFICATION

Insert Delete Copy More Information Filter

ID F10000023

SSN/SIN/TIN 123456789

Name Type AAMC Amcas Name

PERSON

Insert Delete Copy Filter

Last Name Prefix LNPrefix

Suffix test

Last Name Goodhart

Preferred First Name Gerry

First Name Gerald

Full Legal Name

Middle Name James

Marital Status H Happily Married

Prefix Dr

NON-PERSON

Insert Delete Copy Filter

Name

ID AND NAME SOURCE

Insert Delete Copy Filter

Last Update

Origin Banner

Original Creation

User Create Date

Activity Date 07/21/2015 03:34:13 PM Activity User HRISUSR

SAVE

EDIT Record: 1/1 SPRIDEN\_CURRENT SPRIDEN\_ID (1) ellucian..

Accessibility

Updated: June 20, 2025

Accessibility features enable the user to use their keyboard to navigate Banner administrative pages.

Accessibility Mode



Accessibility Mode enables the user to use their keyboard to navigate and set focus to more interactive elements on the Banner page.

**Tip:** If you use a screen reader to interact with the Banner application, Ellucian recommends enabling Accessibility Mode for optimal page navigation using the keyboard.





You can enable and disable Accessibility Mode using one of the following methods:

- Use the CTRL+B shortcut key on a Banner page to enable or disable Accessibility Mode for the current browser session.  
The application displays a message when you enable and disable Accessibility Mode.
- Select the **Enable Button Accessibility Mode** check box on the **General User Preferences Maintenance (GUAUPRF)** page to allow Accessibility Mode to persist across browser sessions.

When you turn on (enable) Accessibility Mode, you can use your keyboard to navigate and set the focus on more interactive page elements as shown in the examples below.

- Calendar 
- Lookup ...
- Drop-down 

The following table shows the navigation differences with Accessibility Mode off and on.

Accessibility Mode Off	Accessibility Mode On
Focus not on the calendar 	Focus on the calendar 
Focus not on Lookup 	Focus on Lookup 
Focus not on drop-down	Focus on drop-down



Accessibility Mode Off	Accessibility Mode On
<div>Change Type <input type="text"/></div>	<div>Change Type <input type="text"/></div>

### Keyboard navigation

Navigate an entire Banner administrative page using only your keyboard when you enter the Alt + Shift + U keyboard shortcut. When you enter the shortcut on a Banner administrative page, the **Navigation Options** window opens, allowing you to select an area of the page to navigate.

The available navigation options listed below depend on the page you are navigating. For example, when you enter Alt + Shift + U on the **ZIP/Postal Code Validation (GTVZIPC)** page, the **Navigation Options** window does not present the **Tab Navigation** option because the page does not contain page tabs.

You can navigate only to active menu options.

- **Page Header** - Select to navigate the page header menu options. For example, **Close**, **Add**, **Retrieve**, **Tools**, and so on.

**Note:** This navigation option is not available if you are accessing the page using Ellucian Experience.

- **Page Footer** - Select to navigate the page footer options. For example, **Previous Section**, **Next Section**, or **Save**.
- **Current Section Actions** - Select to navigate the section menu options. For example, **Settings**, **Insert**, **Delete**, **Copy**, **Filter**, **More Information** and so on.
- **Pagination Actions** - Select to navigate the pagination options. For example, page number, next page, last page, and number of records to display per page.
- **Tab Navigation** - Select to navigate the available tabs on a page.

To navigate another area on the page, enter the Alt + Shift + U shortcut again and select another navigation option.

**Note:** Some menu options have existing shortcut keys. You can continue to use these shortcut keys for quicker access. For example, instead of entering Alt + Shift + U, selecting the **Current Section Actions** option, and then navigating to the **Filter** option, you

can simply press F7 to open the **Filter** panel directly.


## Page header

Updated: August 27, 2020

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.

## Page footer


Updated: August 27, 2020


The page footer displays information at the bottom of the page about each component in the key block and section as you navigate the page.


The screen shots below show examples of some of the information that displays as you navigate through each component on the page. See the highlighted text in each screen shot and the description that follows.

- 

Values include, but are not limited to, EDIT, READ and QUERY.

  - EDIT: Indicates that you can edit the field.
  - READ: Indicates that you can not edit the field. This value displays on query pages.
  - QUERY: This value displays when you search for key block values using the LOV and execute a filter.
- 

Displays the record that you are on and the total number of records available. The example above indicates that you are on record 2 of 4.
- 

Displays the name of the data block.
- 

Indicates the physical name of the field that you are on.

## Key block

Updated: March 18, 2021

The first block on most pages contains key information.

When working with pages using a left-to-right orientation, key block navigation starts in the top-left field and continues horizontally through the fields before navigation shifts to the next row for a key block that contains multiple rows. This same functionality also applies when working with pages using a right-to-left orientation with navigation starting

in the top-right field.

All information displayed on the page relates to the key block values entered. The key block value remains visible on the page for subsequent sections displayed.

After you enter a value in the key block, click **Go** to access the body of the page. After you click **Go**, you cannot enter or modify the key block fields.

You can return to the key block from the body of a page by clicking **Start Over**.

The screenshot shows a web application interface for 'Employee Jobs NBAJOBS 9.0 (GVUDB)'. At the top, there is a blue header bar with a close button (X) on the left and a navigation bar on the right containing icons and labels for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. Below the header, there are four search input fields: 'ID:', 'Position:', 'Suffix:', and 'Query Date:'. The 'Query Date' field is pre-filled with '10/20/2015'. To the right of these fields is a green 'Go' button. Below the search fields, there is a grey bar with the text 'Get Started: Fill out the fields above and press Go.'

## Sections

Updated: September 19, 2024

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.

A section header might look similar to the following example, but could include more icons as described below.








The screenshot shows a section header 'TERM CODE VALIDATION' in a grey bar. To the right of the header are five icons: a grid icon, a list icon, an 'Insert' icon, a 'Delete' icon, a 'Copy' icon, a 'More Information' icon, and a 'Filter' icon.

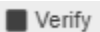

When working with pages using a left-to-right orientation, navigation starts in the top-left field and continues vertically through the fields within a page block before navigation shifts to the next column in the block. This same functionality also applies when working with pages using a right-to-left orientation with navigation starting in the top-right field.

Each section contains related information.

Scroll up and down the page to access sections of data. You can expand or collapse a section 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:

-  **Multiple Records** /  **Single Record**. Use these to switch between multiple record and single record view.
-  **Insert**. Use this to insert records in the section. The insert functionality usually creates uppercase records.
-  **Delete**. Use this to delete records in the section.
- **Copy**. Use this to copy records in the section. When using copy functionality, the application copies the previous record including its case (upper or lower) format. For example, copying a previous record formatted using upper case results in the copied record also formatted using upper case.
-  **Filter**. Use this to filter records in the section.
- **Settings**. Use this to save Grid, Filter, and Pagination preferences.
- **Master**. When selected, a Master user can save Grid, Filter, and Pagination preferences and apply them to all users across the institution. This option is visible only to a user granted Master user access.
- **More Information**. Displays whether supplemental data is available and if data already exists for a record.
  - Indicator displays as a page with lines  if supplemental data already exists for the record.
  - Indicator displays as a blank page  if supplemental data is available to enter for the record.

No indicator displays for sections that do not have supplemental data available. See [Supplemental Data Engine](#) for details.
- The following indicators display if the Person Manager address verification service is enabled on pages that support address verification:
  -  **Verify** — indicates the address is not yet verified
  -  **Verified** — indicates the Person Manager address verification service has verified the address

## Buttons

Updated: August 27, 2020

Banner includes several buttons to navigate and interact with the Banner pages.

Button	Description
Add and Retrieve	Use the <b>Add</b> and <b>Retrieve</b> buttons to interact with Banner Document Management to properly store and review documents. Additional document management functions can be found by opening the <b>Tools</b> menu and scrolling down the menu to the Banner Document Management section.
Go	Use the <b>Go</b> button to advance to the body of the page after populating the key block.
Release and Submit	Use the <b>Release</b> and <b>Submit</b> 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 <b>Save</b> button to save changes on the page. The <b>Save</b> 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 <b>Select</b> button to select and retrieve data from a called page to the current page. Use the <b>Cancel</b> 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, <b>Select</b> and <b>Cancel</b> are presented at the bottom of the page.

Button	Description
Start Over	Use the <b>Start Over</b> button to return to the key block of the page.

## Required fields

Updated: August 27, 2020

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

Updated: August 27, 2020

In a grid layout, you can sort field values, 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

Updated: August 27, 2020

The Banner application has settings to determine how dates are entered and displayed.

You can enter the date directly or use the calendar icon for date selection. You can also enter any single, non-numeric character in the **Date** field and Banner auto-populates the field with the current day's date by default. For example, enter a or g. When you leave the field, Banner automatically enters the current date.

When you enter a date in a date field, for example, **Birth Date** on SPAIDEN, see use the

specified formats shown below for examples of valid values:

- Enter a date using digits only and no separator ("/" or "-"). You must enter at least 6 digits, and no more than 8 digits. Entering more than 8 digits results in a date validation error.
  - 010203 converts to 01/02/2003
  - 01021999 converts to 01/02/1999
  - 0101201 converts to 01/01/201 (Although this numerical sequence converts without errors, this is not a practical date to use).
- Enter a date including a separator ("/" or "-"). You must have at least one digit per group (before the next separator).
  - 1/1/1 or 1-1-1 converts to 01/01/2001
  - 1/1/1 or 1-1-1 converts to 01/01/2001
  - 04/03/001 converts to 04/03/2001 (Banner trims the leading zeros before calculating the year)
  - 1/2/100 validates successfully although not a practical entry.

When a user enters a date and does not specify the year in a 4-digit format, Banner must convert the year entered into a 4-digit format. To do this, Banner uses the defined century pivot value defined in the `format.js` file to calculate and convert the year. The delivered default century pivot value is 50, but the institution's system administrator can change this value, as described in the [Display of locale-specific objects](#) in the *Banner Administrative Pages Install* content. If the year value entered by the user is equal to or less than the defined century pivot value, Banner converts the year to a 4-digit year in the current century. If the year value entered by the user is greater than the defined century pivot value, Banner converts the year to a 4-digit year in the previous century.

Date conversion examples assuming the century pivot value of 50.


- 010249 converts to 01/02/2049
- 010250 converts to 01/02/2050
- 010251 converts to 01/02/1950
- 010263 converts to 01/02/1963

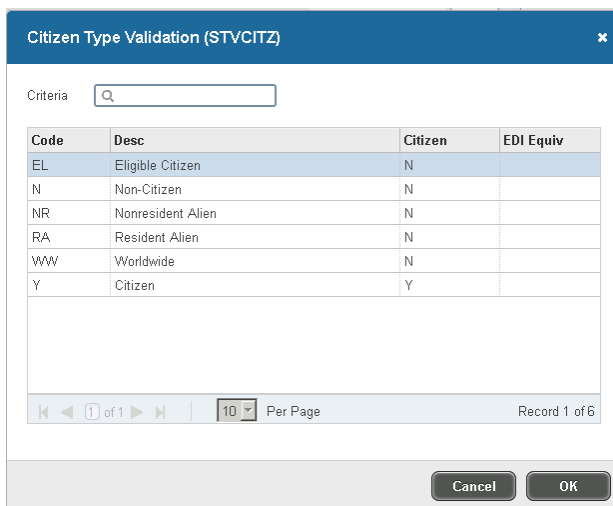


## Lookup

Updated: August 27, 2020

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.



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	

Criteria:

1 of 1 | 10 Per Page | Record 1 of 6

Cancel OK

## Filtering data

Updated: August 27, 2020

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

Updated: August 27, 2020

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


## Procedure

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

**Result:** 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**.


**Result:** 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  in the upper right corner of the filter window to close the filter.

## Basic filter

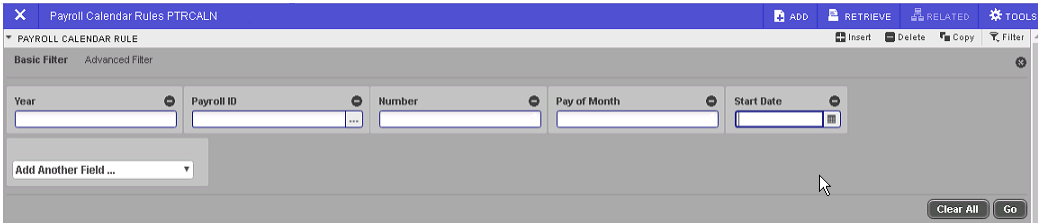
Updated: August 27, 2020

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.

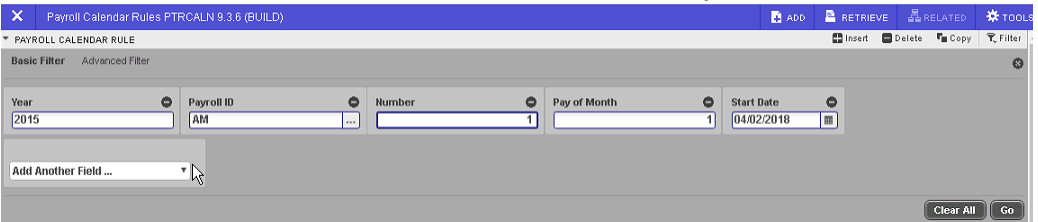
Procedure

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



**Result:** 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

Basic Operator	Advanced Operator
#IS NULL #OR <>	Not Equal or IS NULL
#IS NULL	IS NULL
#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**.

**Result:** 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  in the upper right corner of the filter window to close the filter.

## Help

Updated: August 27, 2020

Application Navigator provides field-based reference (online help), for pages.

Click on the question mark in the Application Navigator side-bar to open the page **Help** icon to access the field-based reference 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.

## Data record views

Updated: March 17, 2022

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

Banner presents data in either a single record or grid view.

### Single record view

In a single record view, the data details display one record at a time in an easy to read format rather than in a table grid. You can navigate between records using the pagination controls.

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

From Date: 12/16/2019   To Date:   Address Type: BI   Sequence Number: 1   House Number:   Street Line 1: 11 1st Street   Street Line 2: 22 2nd Street   Street Line 3: 33 3rd Street   Street Line 4:   City: Malvern   State or Province: PA   ZIP or Postal Code: 19355   County:   Nation:   Telephone Type: BI   Country Code:   Area Code:   Phone Number:   Extension:   Inactivate Address:   Source:   Delivery Point:   Correction Digit:   Carrier Route:


1 of 10   1 Per Page   Record 1 of 10

### Grid view

In a grid view, multiple data records display in column and row format. You might need to scroll to view all the data. You can use the pagination controls to page through the records (first, last, next, previous, or specific page number), set the number of records to display in the grid, and sort the data in ascending or descending order.

Approval Category Code *	Description *	Self-Service Description	Self Service Display Sequence
2ADDR	1234567890	2345678901111	15
ADDR	123	Address Information	3
ADDTL	Address	Address and Telephone Changes	4
ALL	All field	xc	
AMYNC	Amy Test for Name Change	Name Change	34
APIDEN	Amy Test ID/Name Change		190
APJCHG	Job Changes		436
APJFD	Job Fileds		435
APLEAV	Put Employee on Leave		187
BBADJ	BBates Adjunct Contract	hhd	21

1 of 12   10 Per Page   Record 1 of 120

Within a grid, the **Open Edit Dialog**  button is visible on text fields that contain multiple lines of text with carriage return/line feed characters. Click the **Open Edit Dialog** button or place your cursor in the field and use the **Ctrl+E** shortcut to open a dialog box to view and edit the text. The button is not visible on text fields containing only a single line of text, but you can still use the **Ctrl+E** shortcut to open the dialog box.

## Page Layout

Updated: March 18, 2021

You can toggle between page layouts by selecting the page layout option on the Tools menu

There are three 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.
- Comfortable  
This layout displays pages with increased overall spacing for the following page components:
  - Line spacing
  - Paragraph spacing
  - Letter spacing
  - Word spacing

You can switch between these layouts by clicking **Tools > Page Layout** and selecting either **Expanded**, **Compact**, or **Comfortable**. 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** layout the next time you open a new browser session and log in to Application Navigator.

## Print Screenshot

Updated: August 27, 2020

Print Screen shot is a printing feature available on the **Tools** menu or by using the Ctrl+Alt+P shortcut.

Use the **Print Screenshot** option to render a screen shot preview and print the visible screen area within the browser.

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

Updated: August 27, 2020

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

## Supplemental Data Engine

Updated: August 27, 2020

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 displays in the section header. Use the **More Information** window to view, edit, or add information. When you add information, you are prompted to save the changes. You can continue to work on the primary page.



[illegible]

## Multi-Entity Processing

Updated: August 27, 2020

You can use Multi-Entity Processing (MEP) to select which institution 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
<b>SOUTH</b>	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.
- Click **Select** to sign 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

Updated: August 27, 2020

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. The **Change** icon is located in the top right corner of the page header.

## Data masking

Updated: June 16, 2022

Data masking is a way to partially or completely obscure data in selected fields.

For more information about data masking, see the *Data masking, hiding, and concealing fields* topic found in the Banner Access Management Use content on the Ellucian Documentation site.

### Related concepts

- [Data masking, hiding, and concealing fields](#)

## Data export

Updated: August 27, 2020

Data export allows you to export data from a Banner page to an Excel spreadsheet (.xlsx) by selecting **Tools > Export**.

To enable or disable exporting data from a page, the page must have the **Data Extract Option** field on the Object Maintenance (GUAOBSJ) page set to one of the following values for a specified page:

Data Extract Option	Description
<b>Key and Data Block</b> or <b>Data Block Only</b>	Enables exporting Key Block data and Data Block data in the section where you place your cursor. For pages with multiple sections, you must perform the export for each section, ensuring that you place the cursor in the appropriate section.  Key Block data always exports regardless of the <b>Data Extract Option</b> field setting unless a page does not have a Key Block.
Not Available	Export is not available for the specified page.

Export commands generate different export file formats based on the Data extract format setting defined within the Directory Options window of the General User Preferences Maintenance (GUAUPRF) page. A value of FILE extracts a .csv formatted file to display in the browser. A value of TEXT extracts a .txt formatted file to display in the

browser. A value of WEBUTIL extracts a .xls formatted file to display in the browser.

Because of file and record limitations with third-party tools like Microsoft Excel, Ellucian recommends using the FILE option to perform exports consisting of a large number of files or records (e.g. several hundred thousand or more).

When exporting from Banner Administrative applications, the following interactions appear within the user interface:

Interaction	Description
Number of Records to Export Warning	<p>The export functionality may take some time, do you want to continue?</p> <p>This warning displays when the minimum number of records selected by a user for export exceeds the record count, as defaulted in the Banner Admin Common product or set by your system administrator</p> <p><b>Note:</b> This message appears only if your system administrator has not turned this feature off by setting the configuration value to N.</p>
Show Export Warning Message	<p>This setting controls whether the warning message displays if the number of records selected to export is greater than or equal to the value specified for the Number of Records to Export Warning setting.</p> <p>The default value in the Banner Admin Common product is Y. A value of N indicates that your system administrator turned this feature off.</p>
Timer to Refresh the Export Counter	<p>This setting specifies how often (number of seconds) the expected counter display refreshes. The counter display refreshes whenever the specified number of seconds passes from the last time the counter refreshed, or the number of records exported from the time of the last refresh is greater than or equal to the value specified for the exported records counter.</p>

Interaction	Description
	This value is the default value in the Banner Admin Common product or set by your system administrator.
Exported Records Counter	<p>This setting specifies how often (number of records) the exported records counter display refreshes. The counter display refreshes whenever the specified number of records have exported from the last time the counter refreshed, or the number of seconds specified for the Timer to Refresh the Export Counter has passed, whichever occurs first.</p> <p>This value is the default value in the Banner Admin Common product or set by your system administrator.</p>

## Run an export

Updated: August 27, 2020

When you run an export, the export process presents several options that you can select from depending on the default configuration settings delivered with Banner Admin Common or set by your system administrator.

### About this task

The export functionality exports only the data in the section where you place the cursor focus. For pages with multiple sections that you want to export, you must run the export for each section on that page, ensuring that you place the cursor in the appropriate section.

### Procedure

1. Place the cursor focus in the section that you want to export.
2. Select **Tools > Export** to start the export.

If you have export configured to display the warning message and the number of records meets or exceeds the defined value set in the Number of Records to Export Warning setting, a dialogue window opens and displays the message `Exporting data from block Block_Name_BLOCK may take some time. Do you want to continue?` and prompts the user with three options to choose from.

3. Select an appropriate option when prompted.

Option/Button	Export behavior
<b>Continue</b>	Click <b>Continue</b> to continue with the export of the data in the section where you have placed the cursor.  This opens the <b>Creating Export File</b> dialogue that allows you to monitor the progress of the export or select <b>Cancel</b> to cancel the export.
<b>Skip Block</b>	Selecting <b>Skip Block</b> causes the export to skip exporting the data in the section with the cursor focus and generate a file that contains only the Key Block data. If the page does not have a Key Block, the export generates an empty export file.
<b>Cancel</b>	Select <b>Cancel</b> to cancel the export. You can select <b>Cancel</b> at anytime during the export. Canceling an export does not generate an export report.  A message appears indicating the cancellation was successful.

If you have export configured not to display the warning message, or the number of records does not meet or exceed the defined value set in the Number of Records to Export Warning setting, the data export starts and the **Creating Export File** dialogue window opens with an option to **Cancel Export**.

4. When the export completes, you have the option to **Open**, **Save**, or **Cancel** the generated export file.

## User Preferences for Admin

Updated: August 27, 2020

User Preferences for Admin provides functionality for users to define and save custom page settings that persist across user sessions.

This feature enables users to apply customizations to a page at the individual user level or at the institution level (Master user) which allows sharing customizations across all institution users.

Before you can apply custom page settings the administrator must select the **User Preferences for Admin Enabled** check box on the Institution Controls (GUAINST) page. After enabling User Preferences for Admin, the institution can choose which pages to allow users to customize on the Object Maintenance (GUAOBS) page, by selecting the **User Preferences for Admin Option** check box.

**Note:** Ellucian delivers all TYPE = FORM entries enabled, except for known pages that do not contain any page elements (grid, filter, pagination bar) for which to apply user preferences.

For pages with multiple sections/blocks or multiple tabs, you must apply and save your settings at the individual section/block or tab of the page.

Pages enabled to allow user preference settings have one or both of the following options available on the section/block header.

Option	Description
Settings	Visible on the section/block headers of a page. This option is available to all users to save any of their grid, filter and pagination preferences.
Master	<p>Only users granted with Master user access have the <b>Master</b> check box visible on the section header. The Master user can save grid, filter, and pagination preferences which apply to all users across the institution that do not have their own settings applied to those same page elements of a section/block or tab.</p> <p>Settings applied by an individual user override settings applied by the Master user.</p>

## User Preferences features

Updated: August 27, 2020

Users can customize and save their personal preferences to column, pagination, and filter settings on pages enabled for User Preferences for Admin.

You can apply and save settings for the following page elements at the individual section/block of the page.

Feature		Description
Grid/Column layouts	<p>The ability to customize grids and columns is available on all administrative pages/windows (including the Supplemental Data Engine window), with the exception of List of Value (LOV) windows.</p> <p>When restoring grid/column settings users must exit and return to the page to see the restored default column settings.</p>	
	Column width	Re-size column widths. This includes shrinking columns where only the column border remains visible, allowing for more visible data on the page without the need to scroll.
	Column order	<p>Re-order columns.</p> <p>When you re-order columns, tab navigation follows the original page, as delivered by Ellucian.</p>
	Column freeze/unfreeze	<p>Re-order columns that you want to freeze or unfreeze.</p> <p>You must always have at least one frozen column at all times.</p>
Filter fields and filter data	When restoring filter settings users must exit and return to the page to see the restored default filter settings.	
	Filter settings	Save Basic or Advanced filter as your default setting.
	Fields	Save filter list and field order.



Feature		Description
	Operators	Save specific operator value settings
	Data	Save specific data value settings
Pagination	Number of records to display	Persist the number of records displayed per page/section/block based on the values available to you in the pagination bar.

## User Preference settings options

Updated: August 27, 2020

The **Settings** drop-down menu option on the section/block header provides options to save new preferences or restore previously saved preferences to the default settings.

Users can save grid, filter, and pagination preferences individually or select **Save All**. They can also restore grid, filter and pagination preferences individually or select **Restore All**.

If you are a Master user and want to apply page changes for the institution, you must select the **Master** check box before you save the page settings.

**Note:** Users that have their own preferences already applied to page elements before the master user applies master page settings to those same page elements will not lose their own user preferences.

After applying user preferences, save them by selecting the appropriate option from the **Settings** drop-down menu.

Setting	Description
Save Column Settings	Save changes that you specify for column width, column position, and frozen columns.
Save Pagination Settings	Saves the number of records you specify to display for a section/block on a page.
Save Filter Settings	Save the filter settings (Basic or Advanced) that you specify. You must be in filter mode to see this setting enabled on the drop-down menu.
Save All	Saves all column, pagination, and filter settings that you changed.
Restore Column	Restores previously saved columns settings to the default

Setting	Description
Settings	<p>column settings, as defined by your institution's Master user, or as delivered by Ellucian.</p> <p>You must exit and return to the page to see the restored default column settings.</p>
Restore Pagination Settings	<p>Restores the default number of records to display for a section/block, as defined by your institution's Master user, or as delivered by Ellucian.</p> <p>Restoring pagination settings takes affect immediately without needing to exit and return to the page.</p>
Restore Filter Settings	<p>Restores the default filter settings, as defined by your institution's Master user, or as delivered by Ellucian.</p> <p>You must exit and return to the page to see the restored default filter settings.</p>
Restore All	Restores all previously saved preferences to the default settings, as defined by your institution's Master user, or as delivered by Ellucian.

Access **TOOLS > PAGE SETTINGS** on the menu to select the following available options:

Option	Description
Restore Default Settings	Available to all users to clear all user preferences for a page and restore the default page settings, as defined by your institution's Master user, or as delivered by Ellucian.
Disable Page Settings	<p>Available and visible only to the Master user.</p> <p>Selecting this option the first time turns off the ability for users to apply user preferences to a specified page, if needed. When the Master user selects this option, the <b>Settings</b> and <b>Master</b> check boxes are no longer visible on the section header. The Master user can re-enable user preferences by selecting this option again.</p>

Option	Description
	Users must close and re-open the page to see the user preferences feature disabled/re-enabled.
Selecting <b>Disable Page Settings</b> does not alter the <b>User Preferences for Admin Option</b> selection on the Object Maintenance (GUAOBJJS) page.	

## Item properties

Updated: August 27, 2020

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

Updated: August 27, 2020

The following table lists the keyboard shortcuts that you can use to navigate through Banner administrative pages.

Action	Shortcut
Accessibility	
Toggle Accessibility mode ON/OFF for current session	CTRL+B
Toggle keyboard page navigation ON/OFF for current session	ALT+SHIFT+U
Page Functions	
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q
Change MEP Context	CTRL+SHIFT+C

Action	Shortcut
Choose/Submit	ENTER
Clear All in Section	SHIFT+F5
Clear One Record	SHIFT+F4
Clear Page or Start Over	F5
Count Query	SHIFT+F2
Delete Record	SHIFT+F6
Down/Next Record	Down Arrow
Duplicate Item	F3
Duplicate Selected Record	F4
Edit	CTRL+E
Execute Filter Query	F7
Exit	CTRL+Q
Expand/Collapse Drop-down Field	ALT+Down Arrow
Export	SHIFT+F1
First Page	CTRL+Home
Insert/Create Record	F6
Last Page	CTRL+End
List of Values	F9
More Information	CTRL+SHIFT+U
Next Field or Item	TAB
Next Page Down	Page Down
Next Section	ALT+Page Down
Open Menu Directly	CTRL+M
Open Related Menu	ALT+SHIFT+R
Open Tools Menu	ALT+SHIFT+T
Page Tab 1	CTRL+SHIFT+1
Page Tab 2	CTRL+SHIFT+2
and so on	and so on

Action	Shortcut
Previous Field or Item	SHIFT + TAB
Previous Page Up	Page Up
Previous Section	ALT+Page Up
Print Screenshot	CTRL+Alt+P
Refresh or Rollback	F5
Save	F10
Search or Open Filter Query	F7
Select on a Called Page	ALT+S
Toggle Multi/Single Records View	CTRL+G
Up/Previous record	Up Arrow
Workflow	
Release Workflow	ALT+Q
Submit Workflow	ALT+W
Banner Access Management (BAM)	
Sign Out	SHIFT+ALT+Z
Banner Document Management (BDM)	
Add BDM Documents	ALT+A
Retrieve BDM Documents	ALT+R
Application Navigator	
App Nav - Access Help	CTRL+SHIFT+L
App Nav - Add/Remove page from Favorites folder	CTRL+SHIFT+O
App Nav - Display Applications Menu	CTRL+M
App Nav - Display Dashboard/Home	CTRL+SHIFT+X
App Nav - Display Favorites Menu	CTRL+D
App Nav - Display Recently Opened Items	CTRL+Y
App Nav - Side Search	CTRL+SHIFT+Y
App Nav - Sign Out	CTRL+SHIFT+F
User preferences	
Save Column Settings	ALT+1

Action	Shortcut
Save Pagination Settings	ALT+2
Save Filter Settings	ALT+3
Save All	ALT+4
Restore Column Settings	ALT+5
Restore Pagination Settings	ALT+6
Restore Filter Settings	ALT+7
Restore All	ALT+8
Disable Page Settings	SHIFT+ALT+Z
Restore Default Settings	CTRL+SHIFT+Z
Select/Clear Master Check box	CTRL+SHIFT+M

### Related concepts

- [Application Navigator](#)

## Banner object naming standards

Updated: August 27, 2020

Banner objects follow a specific naming convention to ensure consistency and proper functioning across all Banner applications. A Banner object name has a short name, consisting of a seven or eight character mnemonic and a long name, which is the full name of the object.

For example, Basic Course Information page (SCACRSE).

- Short name = SCACRSE
- Long name = Basic Course Information

The short name (mnemonic) is comprised of the following components:

- System ID (one or two characters)
- Module ID (one character)
- Object type code (one character)

- Unique ID (four characters)

The following table shows a few examples of Banner short name menonics.

Short Name (mnemonic)	System ID	Module ID	Object type code	Unique ID
SCASRSE	S = Student	C = Catalog	A = Application	CRSE = Basic Course Information
GEAATID	G = General	E = Event Management	A = Application	ATID = Event Registration
STVRSTS	S = Student	T = Validation page/table	V = Validation page/table	RSTS = Course Registration Status Code Validation

## System IDs

Updated: June 28, 2023

The first component of a Banner object name is a one- or two-character code that identifies the primary system associated with the page, report, job, or table. In most cases, the system ID is the same as the system indicator on the GTVSYSI table.

Some examples of system IDs are as follows:

System ID	Banner System
A	Advancement
E	Document Management
F	Finance
G	General
K	Reserved for localizations for regional support
N	Position Control
P	Human Resources/Payroll/Personnel
R	Financial Aid
S	Student

System ID	Banner System
T	Accounts Receivable
XP	Windstar International Tax Navigator Interface for Banner
Y	Reserved for client applications
Z	Reserved for client applications

## Module IDs

Updated: June 28, 2023

The second component of a Banner object name identifies the module associated with the page, report, job, or table.

Some examples of module IDs are as follows:

System (ID)	Module ID	Module
Advancement (A)	A	Membership
	D	Designation
	E	Event Management
	F	Campaign
	G	Pledge and Gift/Pledge Payment
	L	Label
	M	Prospect Management
	O	Organization
	P	Constituent/Person
	S	Solicitor Organization
	T	Validation page/table
	U	Utility
	X	Expected Matching Gift
Accounts Receivable (T)	F	Finance Accounts Receivable
	G	General Accounts Receivable
	O	Overall
	R	Research Accounting



System (ID)	Module ID	Module
	S	Student Accounts Receivable
	T	Validation
	U	Utility
	V	Canadian
	Z	Texas Connection under Schema TXCNMGR
Document Management (E)	T	Validation form/table
	X	BDMS
Finance (F)	A	Accounts Payable
	B	Budget Development
	C	Cost Accounting
	E	Electronic Data Interchange
	F	Fixed Assets
	G	General Ledger
	I	Investment
	N	Endowment Management
	O	Operations
	P	Purchasing/Procurement
	R	Research Accounting
	S	Stores Inventory
	T	Validation page/table
	U	Utility
	V	Canadian and Latin America
	X	Archive/Purge
	Z	Texas Connection under Schema TXCNMGR
General (G)	E	Event Management
	C	Communication Management
	J	Job Submission
	K	MDUU, Asia Pacific Web Services, XML

System (ID)	Module ID	Module
	L	Letter Generation
	M	Text Management
	O	Overall
	P	Proxy Access/Purge
	S	Security
	T	Validation page
	U	Utility
	V	Canadian, California Reporting Engine, Latin America,
	X	Cross product
	Z	Texas Connection under Schema TXCNMGR
Position Control (N)	A	Application
	B	Budget
	C	COBRA
	D	Benefit/Deductions
	E	Employee
	H	Time Reporting/History
	O	Overall
	P	General Person
	R	Electronic Approvals
	S	Security
	T	Validation page
	U	Utility
	V	Canadian and California
	X	Tax Administration
	Z	Texas Connection under Schema TXCNMGR
Human Resources (P)	A	Application
	B	Budget

System (ID)	Module ID	Module
	C	COBRA
	D	Benefit/Deductions
	E	Employee
	H	Time Reporting/History
	O	Overall
	P	General Person
	R	Electronic Approvals
	S	Security
	T	Validation page
	U	Utility
	V	Canadian and California
	X	Tax Administration
	Z	Texas Connection under Schema TXCNMGR
Financial Aid (R)	B	Budget
	C	Record Creation
	E	Electronic Data Exchange
	F	Funds Management
	H	History and Transcripts
	J	Student Employment
	L	Logging
	N	Need Analysis
	O	Common Functions
	P	Packaging & Disbursements
	R	Requirements Tracking
	S	Student System Shared Data
	T	Validation page
	U	Utility
	V	California
	Z	Texas Connection under Schema

System (ID)	Module ID	Module
		TXCNMGR
Student (S)	A	Admissions
	C	Catalog
	F	Registration/Fee Assessment
	G	General Student
	H	Grades/Academic History
	I	Faculty Load
	K	Asia Pacific, Europe
	L	Location Management
	M	Curriculum, Advising and Program Planning (CAPP)
	O	Overall
	P	Person
	S	Schedule
	T	Validation page/table
	U	Utility
	V	California, Latin America, Canada
	Y	Middle East
	Z	Texas Connection under Schema TXCNMGR, Europe Ireland
Windstar International Tax Navigator (XP)	D	Download
	E	Extract
Any System	W	Reserved for client pages or jobs
	Y	Reserved for client pages. Note exception: Student Middle East module tables delivered under Saturn schema use Y.
	Z	Reserved for client pages. Note exceptions: all products use Z for Texas Connection tables under TXCNMGR schema . Europe Ireland

System (ID)	Module ID	Module
		module tables delivered under Saturn schema are SZBADDR, SZBSFEX, SZRADAP, SZRIDUP, SZRIREC, SZRSUPS, SZRWDAP.

## Object type codes

Updated: April 05, 2021

The third component of a Banner object name identifies the type of page, report, job, or table.

A few examples of object type codes are as follows:

Object type code	Description
A	Application page
B	Base table
C	Called page
I	Inquiry page
M	Maintenance
P	Process/Report page
Q	Query page
R	Repeating table, Rules page, or Report