

HOW TO PLACE BANNER USER PREFERENCES FOR YOUR BANNER ACCOUNT

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REVISION HISTORY

Version	Date	Name	Description
1	June 2021	Kari	Created

INTRODUCTION AND PURPOSE

The purpose of this document is to explain how Banner users can modify sections of pages to maximize their efficiency. This has the potential to accomplish the following:

- Increase the usability of the pages
- Increase the visibility of data
- Prioritize fields that mean the most to you as a user
- Settings persist over logins and sessions
- Reduce clicks and maneuvering within the pages

These changes are optional and will persist after the user logs out.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

Some pages will be set up with master settings that are seen for all users on campus. Any personal settings you place will override the master settings and display for you, the individual user, only.

Users are responsible for the changes they make and any fields that are hidden or obscured as a result of making preference changes.

It is recommended that the instructions below are followed but if a user wants to save or remove multiple preferences simultaneously, they can access the Save All option to retain all changes or the Restore All option to remove all of their personal preferences in bulk.

Please note that preferences apply to one section, tab, or block within a page. Therefore if there are multiple sections on a page you want to modify, you will need to repeat the steps for each section.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

All Banner users who wish to utilize page preferences

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbx.ucr.edu) to follow along.

FORMS

Any pages with the Settings menu displaying can have these preferences applied.

Form	Form Name	Description

PROCEDURES

CHANGES TO THE FILTER (OR QUERY) SECTION OF A PAGE

This section describes how to change whether the page filter defaults to the basic or advanced filter, which fields show on the page to filter with, and if any values or operators are pre-filled for the filter.

STEPS

1. Go to the page in Banner you wish to apply a preference to. In this example, SSASECQ is accessed.

The screenshot shows the Banner 'Schedule Section Query' (SSASECQ) interface. At the top, there are navigation buttons: ADD, RETRIEVE, RELATED, and TOOLS. Below this is the 'SCHEDULE SECTION QUERY' header with a 'Settings' icon and buttons for Insert, Delete, Copy, and Filter. The main area is divided into 'Basic Filter' and 'Advanced Filter' tabs. Under 'Basic Filter', there are five input fields: 'Term', 'Part of Term', 'Registration From', 'Registration To', and 'CRN'. Each field has a small black circle in its top right corner. Below these fields is a dropdown menu labeled 'Add Another Field ...'. At the bottom right of the filter section are 'Clear All' and 'Go' buttons. Below the filter section is a table with columns: Term, Part of Term, Registration From, Registration To, CRN, Block Schedule, Subject, Course, Section, Section Status, and Campus. The table shows one record with values for Maximum, Actual, and Remaining enrollment and waitlist.

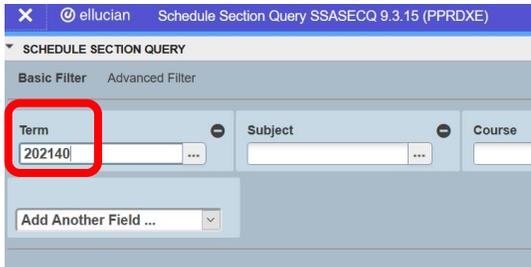
2. If the page offers a choice between a Basic or an Advanced Filter, decide which filter you want to default. Verify that this filter is displaying before proceeding.
3. Decide which fields you want to show for your filter on this page.
 - a. You can remove the fields that Ellucian provides by clicking the black circle in the upper right corner of the field.



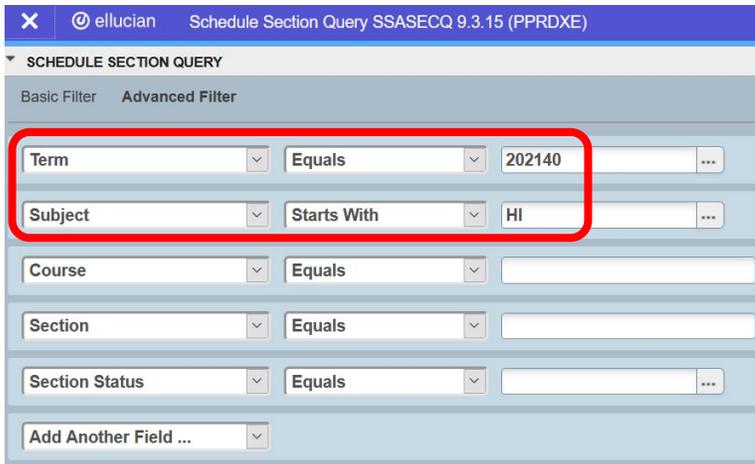
- b. You can select fields to display from the drop-down menu called Add Another Field by clicking on the menu and selecting the field.



- c. You can save values in the fields for either the basic or advanced filter or operators on the advanced filter that will pre-fill each time you perform a filter. For example, you could enter a term code that you want to appear each time you go to this page to expedite your inquiry:

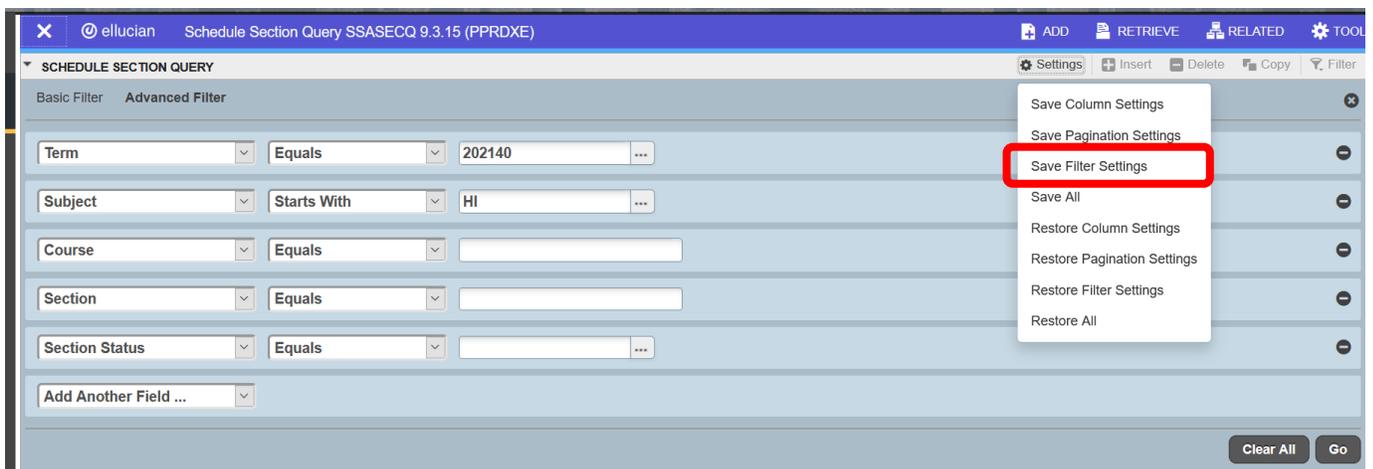


You can also enter a value (like a term code or subject) and an operator (like Starts With) to pre-fill in the Advanced Filter:



- Once you have made these selections, click the Settings menu in the upper right corner and select Save Filter Settings. These settings will now be available to you in current and future Banner sessions. If you save settings on the Advanced Filter, that is the filter that will default the next time you access the page but the Basic Filter can still be accessed, and vice versa.

To remove your personal preferences, access the page and go to the Settings menu and select Restore Filter Settings.



CHANGES TO THE COLUMN WIDTH OR ORDER OF COLUMNS

This section describes how to change the column width or the order of the columns on a page.

STEPS

- Go to the page in Banner you wish to apply a preference to. Enter the required information at the top of the page and press Go. In this example, SFASTCA is accessed.

Sequence Number	Term	CRN	Subject	Course	Section	Campus	Level	Grading Mode	Attempted Hours	Credit Hours	Bill Hours	Source	Course
1	202020	56369	LBST	191	001	C	U	L	4.000	4.000	4.000	TEMP	RW
2	202020	56369	LBST	191	001	C	U	L	4.000	4.000	4.000	BASE	RW
3	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW
4	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW
5	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW
6	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW
7	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW
8	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW
9	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW
10	202020	64643	EDUC	132	013	C	U	L	0.000	0.000	0.000	TEMP	RW
11	202020	64643	EDUC	132	013	C	U	L	0.000	0.000	0.000	BASE	RW
12	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	BASE	RW
13	202020	64659	EDUC	161	012	C	U	L	0.000	0.000	0.000	TEMP	RW
14	202020	64657	EDUC	161	001	C	U	L	4.000	4.000	4.000	TEMP	RW
15	202020	64657	EDUC	161	001	C	U	L	4.000	4.000	4.000	TEMP	RW

- To change the width of a column, hover over the area between two columns until the arrows appear.  Drag the column width to where you want it to be. In this example the width of the Subject, Course, Section, Campus, Level, and Grading Mode columns are modified to be skinnier. Here is the page before the width adjustments:

Sequence Number	Term	CRN	Subject	Course	Section	Campus	Level	Grading Mode	Attempted Hours	Credit Hours	Bill Hours	Source	Course
1	202020	56369	LBST	191	001	C	U	L	4.000	4.000	4.000	TEMP	RW
2	202020	56369	LBST	191	001	C	U	L	4.000	4.000	4.000	BASE	RW
3	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW
4	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW
5	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW
6	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW
7	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW
8	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW
9	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW
10	202020	64643	EDUC	132	013	C	U	L	0.000	0.000	0.000	TEMP	RW
11	202020	64643	EDUC	132	013	C	U	L	0.000	0.000	0.000	BASE	RW
12	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	BASE	RW
13	202020	64659	EDUC	161	012	C	U	L	0.000	0.000	0.000	TEMP	RW
14	202020	64657	EDUC	161	001	C	U	L	4.000	4.000	4.000	TEMP	RW
15	202020	64657	EDUC	161	001	C	U	L	4.000	4.000	4.000	TEMP	RW

Here is the page after the width adjustments:

Student Course Registration Audit SFASTCA 9.3.6 (PPRDXE)

ID: 862 Term Code: 202020 Registration From Date: Registration To Date: Confidential Start Over

Registration Audit Registration Error Message

STUDENT COURSE REGISTRATION AUDIT

Sequence Number	Term	CRN	Subject	Course	Section	Campus	Level	Grading Mode	Attempted Hours	Credit Hours	Bill Hours	Source	Course Status	Status Date
1	202020	56369	LBST	191	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
2	202020	56369	LBST	191	001	C	U	L	4.000	4.000	4.000	BASE	RW	02/14/2020
3	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
4	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
5	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
6	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
7	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
8	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
9	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
10	202020	64643	EDUC	132	013	C	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
11	202020	64643	EDUC	132	013	C	U	L	0.000	0.000	0.000	BASE	RW	02/14/2020
12	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	BASE	RW	02/14/2020
13	202020	64659	EDUC	161	012	C	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
14	202020	64657	EDUC	161	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
15	202020	64657	EDUC	161	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020

Record 1 of 52

- You can also change the order of the columns on the page. Do this by clicking on the title of the column and dragging it left or right to where you want it to be. In this example the Credit Hours will be moved to be between the Section and the Campus.

Before the change is made:

Student Course Registration Audit SFASTCA 9.3.6 (PPRDXE)

ID: 862 Term Code: 202020 Registration From Date: Registration To Date: Confidential Start Over

Registration Audit Registration Error Message

STUDENT COURSE REGISTRATION AUDIT

Sequence Number	Term	CRN	Subject	Course	Section	Campus	Level	Grading Mode	Attempted Hours	Credit Hours	Bill Hours	Source	Course Status	Status Date
1	202020	56369	LBST	191	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
2	202020	56369	LBST	191	001	C	U	L	4.000	4.000	4.000	BASE	RW	02/14/2020
3	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
4	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
5	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
6	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
7	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
8	202020	64667	EDUC	162	013	U	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
9	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
10	202020	64643	EDUC	132	013	C	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
11	202020	64643	EDUC	132	013	C	U	L	0.000	0.000	0.000	BASE	RW	02/14/2020
12	202020	64640	EDUC	132	001	C	U	L	4.000	4.000	4.000	BASE	RW	02/14/2020
13	202020	64659	EDUC	161	012	C	U	L	0.000	0.000	0.000	TEMP	RW	02/14/2020
14	202020	64657	EDUC	161	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020
15	202020	64657	EDUC	161	001	C	U	L	4.000	4.000	4.000	TEMP	RW	02/14/2020

Record 1 of 52

After the change is made:

Sequence Number	Term	CRN	Subject	Course	Section	Credit Hours	Campus	Level	Grading Mode	Attempted Hours	Bill Hours	Source	Course Status	Status Date
1	202020	56369	LBST	191	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020
2	202020	56369	LBST	191	001	4.000	C	U	L	4.000	4.000	BASE	RW	02/14/2020
3	202020	64667	EDUC	162	013	0.000	U	U	L	0.000	0.000	TEMP	RW	02/14/2020
4	202020	64640	EDUC	132	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020
5	202020	64640	EDUC	132	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020
6	202020	64667	EDUC	162	013	0.000	U	U	L	0.000	0.000	TEMP	RW	02/14/2020
7	202020	64640	EDUC	132	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020
8	202020	64667	EDUC	162	013	0.000	U	U	L	0.000	0.000	TEMP	RW	02/14/2020
9	202020	64640	EDUC	132	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020
10	202020	64643	EDUC	132	013	0.000	C	U	L	0.000	0.000	TEMP	RW	02/14/2020
11	202020	64643	EDUC	132	013	0.000	C	U	L	0.000	0.000	BASE	RW	02/14/2020
12	202020	64640	EDUC	132	001	4.000	C	U	L	4.000	4.000	BASE	RW	02/14/2020
13	202020	64659	EDUC	161	012	0.000	C	U	L	0.000	0.000	TEMP	RW	02/14/2020
14	202020	64657	EDUC	161	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020
15	202020	64657	EDUC	161	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020

- Once you have made these selections, click the Settings menu in the upper right corner and select Save Column Settings. These settings will now be available to you in current and future Banner sessions. To remove your personal preferences, access the page and go to the Settings menu and select Restore Column Settings.

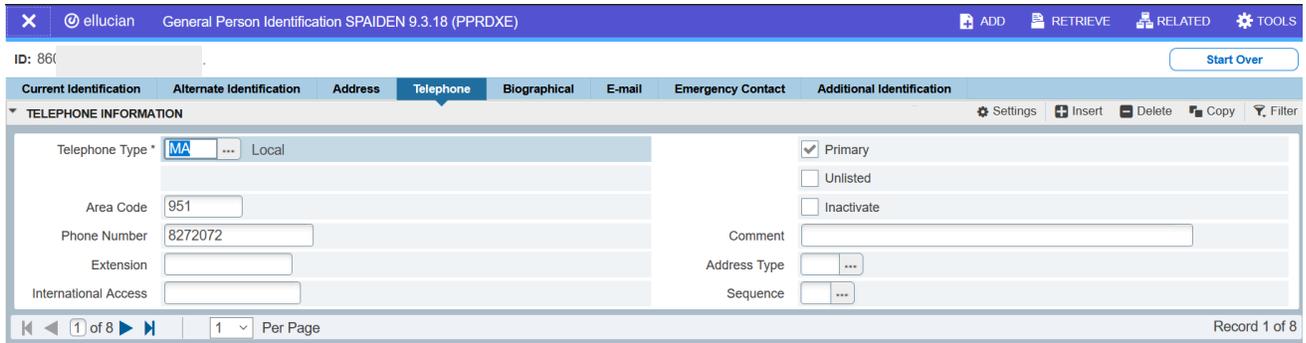
Sequence Number	Term	CRN	Subject	Course	Section	Credit Hours	Campus	Level	Grading Mode	Attempted Hours	Bill Ho	Status	Status Date	
1	202020	56369	LBST	191	001	4.000	C	U	L	4.000			02/14/2020	
2	202020	56369	LBST	191	001	4.000	C	U	L	4.000			02/14/2020	
3	202020	64667	EDUC	162	013	0.000	U	U	L	0.000			02/14/2020	
4	202020	64640	EDUC	132	001	4.000	C	U	L	4.000			02/14/2020	
5	202020	64640	EDUC	132	001	4.000	C	U	L	4.000			02/14/2020	
6	202020	64667	EDUC	162	013	0.000	U	U	L	0.000			02/14/2020	
7	202020	64640	EDUC	132	001	4.000	C	U	L	4.000			02/14/2020	
8	202020	64667	EDUC	162	013	0.000	U	U	L	0.000			02/14/2020	
9	202020	64640	EDUC	132	001	4.000	C	U	L	4.000			02/14/2020	
10	202020	64643	EDUC	132	013	0.000	C	U	L	0.000	0.000	TEMP	RW	02/14/2020
11	202020	64643	EDUC	132	013	0.000	C	U	L	0.000	0.000	BASE	RW	02/14/2020
12	202020	64640	EDUC	132	001	4.000	C	U	L	4.000	4.000	BASE	RW	02/14/2020
13	202020	64659	EDUC	161	012	0.000	C	U	L	0.000	0.000	TEMP	RW	02/14/2020
14	202020	64657	EDUC	161	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020
15	202020	64657	EDUC	161	001	4.000	C	U	L	4.000	4.000	TEMP	RW	02/14/2020

CHANGES TO THE NUMBER OF RECORDS PER PAGE

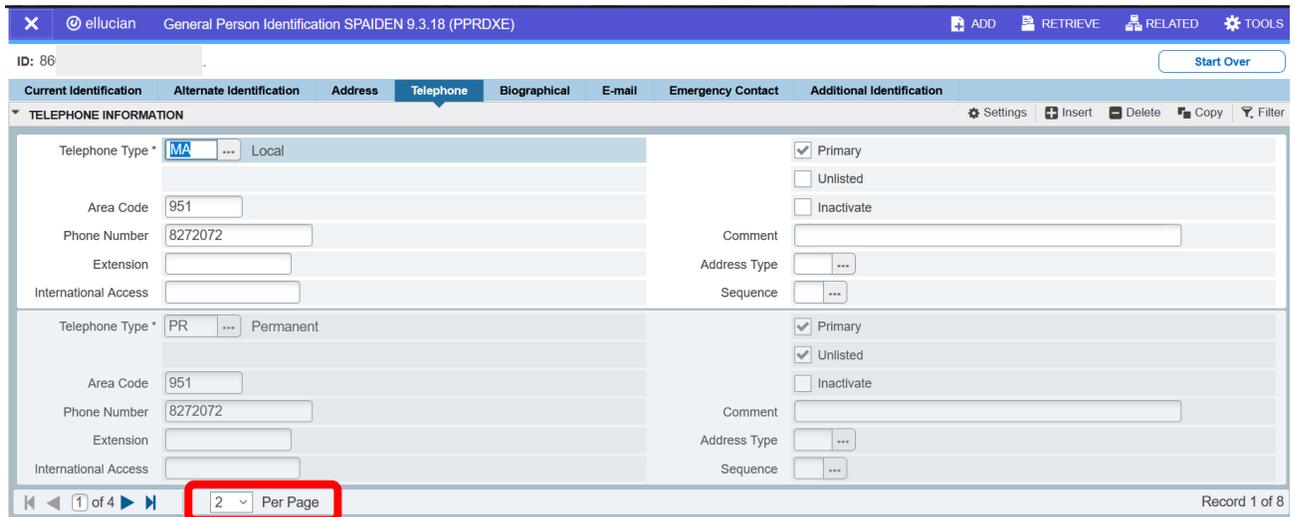
This section describes how to change the number of records per page that defaults when there are multiple records.

STEPS

- Go to the page in Banner you wish to apply a preference to. Enter the required information at the top of the page and press Go. In this example, the telephone tab of SPAIDEN is accessed.



- 2. To change the default number of records per page that displays, utilize the drop-down menu at the bottom to select a different number:



- 3. Once you have made the selection, click the Settings menu in the upper right corner and select Save Pagination Settings. These settings will now be available to you in current and future Banner sessions. To remove your personal preferences, access the page and go to the Settings menu and select Restore Pagination Settings.

The screenshot shows the Banner software interface for a person with ID 866. The 'Telephone' tab is active, displaying two telephone records. The first record is for a 'Local' telephone type with area code 951 and phone number 8272072. The second record is for a 'Permanent' telephone type with area code 951 and phone number 8272072. A context menu is open over the 'Primary' checkbox of the first record, with 'Save Pagination Settings' highlighted in red. The menu also includes 'Save Filter Settings', 'Save All', 'Restore Pagination Settings', 'Restore Filter Settings', and 'Restore All'. The bottom of the screen shows a pagination control with '1 of 4' records and '2 Per Page'.

FINAL QUIZ