



Banner User Preferences for Admin

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Ellucian



Customers Expressed the Need to...

The requirement specifications

- Create a user profile which differs from the Ellucian delivered default
- Reorder data grids and columns to accommodate my business process
- Modify pagination counts to my liking
- Persist page changes across user sessions
- Have system administrator controls

Feature Functionality Deliverables

User Preferences for Admin allows for the persistence of:

- Filter – manage default fields and values
- Grid/Column – manage column order, column size
- Pagination – manage number of records displayed

Each user can establish their own profile and maintain it as needed

- Take it on the go, responsive design allows for User Preferences use on a tablet
- Supports the global market
 - Arabic, English Australian, English Great Britain, English India, English Ireland, French, French Canadian, Portuguese, Spanish languages

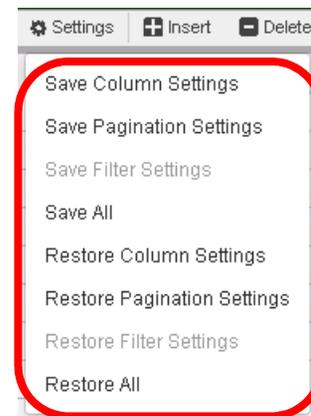
User Preference Display



How Do I Know If User Preferences for Admin Is On?

If User Preferences for Admin is active for a page, you will see the Settings button in the collapsible panel for each section, block and tab of that page

- When On, the Settings button will be visible in the collapsible panel
- When Off, no Settings button will appear in the collapsible panel
- When pressed, the Settings button expands with actions



Actions Available to All Users

All users can:

- Control your own User Preferences for Admin settings without impacting others at the institution
 - You have the power to set grids, columns, filters and pagination to your liking!
- Save or Restore User Preferences at the section, block or tab levels of a page (Alt+1, Alt+2,...Alt+8 shortcuts available)
 - Restoring User Preferences can be done at the page level by using the Tools → Restore Default Settings option (Ctrl+Shift+Z shortcut available)
 - Note: The Restore Default Settings option impacts the full page; not just a specific section, block or tab

The ability to save a User Preference is independent from the ability to perform a create, update, delete transaction

All security roles are eligible to leverage User Preferences functionality on both inquiry only and modifiable pages

Hierarchical Application of User Preferences Settings

Applying and viewing User Preferences for Admin uses the following hierarchy:

1. My own user settings

- If the feature is on and the page is enabled; my personal preferences will display

2. Master user settings

- If the feature is on and the page is enabled but I don't have personal user preferences applied; then I will see the preferences propagated to me by the Master user

3. Banner Admin page default settings

- If the feature is on and the page is enabled but no user or Master preferences are applied; then I will see the page as delivered by Ellucian

Examples



Grids and Columns Data Presentation

Grid and Column preferences by section, block or tab – users can:

- Re-size column widths
 - Includes the ability to shrink columns where only the column border remains visible
- Re-order columns
 - When re-ordering columns, tab navigation follows the original order and business logic of the page, as delivered by Ellucian
- Column freeze/unfreeze
 - Re-order columns that you want to freeze or unfreeze
- Column header stays fixed for easy viewing
- Once changed, the column header will contain a blue highlight to easily track modifications

Available on all page locations presenting a grid or column layout, including the Supplemental Data Engine (SDE) window

“Restore Column Settings” or “Restore All” – exit the page and reenter to refresh the display

Detail Transaction Activity (FGITRND) – Before

ellucian Detail Transaction Activity FGITRND 9.3.12 (Core-PRD) ADD RETRIEVE RELATED TOOLS

COA: B Fiscal Year: 20 Index: Fund: Organization: Account: Program: Activity: Location: Period: Commit Type: Both Start Over

DETAIL TRANSACTION ACTIVITY Settings Insert Delete Copy Filter

Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Document *	Transaction Date *	Activity Date *	Description	Commit Type	Fund *	Activity	Location
6111	11009	10	YTD	30.00	+	CR05	N0016946	07/01/2019	07/30/2019	Cash Receipt 1	U	G18471		
6111	11009	10	YTD	30.00	+	CR05	N0016947	07/01/2019	07/30/2019	Cash Receipt 1	U	G18472		
6111	11009	10	YTD	30.00	+	CR05	N0016948	07/01/2019	07/30/2019	Cash Receipt 1	U	G18473		
6111	11009	10	YTD	30.00	+	CR05	N0016941	07/01/2019	07/30/2019	Cash Receipt 1	U	G18466		
6111	11009	10	YTD	30.00	+	CR05	N0016942	07/01/2019	07/30/2019	Cash Receipt 1	U	G18467		
6111	11009	10	YTD	30.00	+	CR05	N0016943	07/01/2019	07/30/2019	Cash Receipt 1	U	G18468		
6111	11009	10	YTD	30.00	+	CR05	N0016944	07/01/2019	07/30/2019	Cash Receipt 1	U	G18469		
6111	11009	10	YTD	30.00	+	CR05	N0016945	07/01/2019	07/30/2019	Cash Receipt 1	U	G18470		
6111	11009	10	YTD	30.00	+	CR05	N0016937	07/01/2019	07/30/2019	Cash Receipt 1	U	G18462		
6111	11009	10	YTD	30.00	+	CR05	N0016938	07/01/2019	07/30/2019	Cash Receipt 1	U	G18463		
6111	11009	10	YTD	30.00	+	CR05	N0016939	07/01/2019	07/30/2019	Cash Receipt 1	U	G18464		
6111	11009	10	YTD	30.00	+	CR05	N0016940	07/01/2019	07/30/2019	Cash Receipt 1	U	G18465		
6111	11009	10	YTD	30.00	+	CR05	N0016932	07/01/2019	07/30/2019	Cash Receipt 1	U	G18457		
6111	11009	10	YTD	30.00	+	CR05	N0016933	07/01/2019	07/30/2019	Cash Receipt 1	U	G18458		
6111	11009	10	YTD	30.00	+	CR05	N0016934	07/01/2019	07/30/2019	Cash Receipt 1	U	G18459		
6111	11009	10	YTD	30.00	+	CR05	N0016935	07/01/2019	07/30/2019	Cash Receipt 1	U	G18460		
6111	11009	10	YTD	30.00	+	CR05	N0016936	07/01/2019	07/30/2019	Cash Receipt 1	U	G18461		
6111	11009	10	YTD	30.00	+	CR05	N0016927	07/01/2019	07/30/2019	Cash Receipt 1	U	G18452		
6111	11009	10	YTD	30.00	+	CR05	N0016928	07/01/2019	07/30/2019	Cash Receipt 1	U	G18453		
6111	11009	10	YTD	30.00	+	CR05	N0016929	07/01/2019	07/30/2019	Cash Receipt 1	U	G18454		
			Total	1,031,314.62	+									

1 of 2773 20 Per Page Record 1 of 55445

Detail Transaction Activity (FGITRND) – After

ellucian Detail Transaction Activity FGITRND 9.3.12 (Core-PRD) ADD RETRIEVE RELATED TOOLS

COA: B Fiscal Year: 20 Index: Fund: Organization: Account: Program: Activity: Location: Period: Commit Type: Both Start Over

DETAIL TRANSACTION ACTIVITY Settings Insert Delete Copy Filter

Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Document *	Type	Transaction Date *	Activity Date *	Description	Commit Type	Fund	Activity	Location
6111	11009	10	YTD	30.00	+	N0016946	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18471		
6111	11009	10	YTD	30.00	+	N0016947	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18472		
6111	11009	10	YTD	30.00	+	N0016948	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18473		
6111	11009	10	YTD	30.00	+	N0016941	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18476		
6111	11009	10	YTD	30.00	+	N0016942	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18477		
6111	11009	10	YTD	30.00	+	N0016943	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18478		
6111	11009	10	YTD	30.00	+	N0016944	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18479		
6111	11009	10	YTD	30.00	+	N0016945	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18470		
6111	11009	10	YTD	30.00	+	N0016937	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18472		
6111	11009	10	YTD	30.00	+	N0016938	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18473		
6111	11009	10	YTD	30.00	+	N0016939	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18474		
6111	11009	10	YTD	30.00	+	N0016940	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18475		
6111	11009	10	YTD	30.00	+	N0016932	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18477		
6111	11009	10	YTD	30.00	+	N0016933	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18478		
6111	11009	10	YTD	30.00	+	N0016934	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18479		
6111	11009	10	YTD	30.00	+	N0016935	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18480		
6111	11009	10	YTD	30.00	+	N0016936	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18481		
6111	11009	10	YTD	30.00	+	N0016927	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18482		
6111	11009	10	YTD	30.00	+	N0016928	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18483		
6111	11009	10	YTD	30.00	+	N0016929	CF 05	07/01/2019	07/30/2019	Cash Receipt 1	U	G18484		
Total				1,031,314.62	+									

1 of 2773 Per Page 20 Record 1 of 55445

Payroll Calendar Rule Form (PTRCALN)

ellucian Payroll Calendar Rule Form PTRCALN 9.3.6 (Core-PRD)

ADD RETRIEVE RELATED TOOLS

PAYROLL CALENDAR RULE Settings Insert Delete Copy Filter

Year *	Payroll ID *	Number *	Pay of Month *	Start Date *	End Date *	Check Date *	Employee Time Entry Start Date	Employee Time Entry End Date	Employee Time En
2020	MIN	1	1	12/01/2019	12/31/2019	01/07/2020	12/01/2019	01/01/2020	10.00
2020	MIN	2	1	01/01/2020	01/31/2020	02/07/2020	01/01/2020	02/01/2020	10.00
2020	MIN	3	1	02/01/2020	02/29/2020	03/07/2020	02/01/2020	03/01/2020	10.00
2020	MIN	4	1	03/01/2020	03/31/2020	04/07/2020	03/01/2020	04/01/2020	10.00
2020	MIN	5	1	04/01/2020	04/30/2020	05/07/2020	04/01/2020	05/01/2020	10.00

Before

After

ellucian Payroll Calendar Rule Form PTRCALN 9.3.6 (Core-PRD)

ADD RETRIEVE RELATED TOOLS

PAYROLL CALENDAR RULE Settings Insert Delete Copy Filter

Year *	Payroll ID *	Numb...	Pay of Month *	Start Date *	End Date *	Check Date *	Employee Time Entry Start Date	Employee Time Entry End Date	Employee Time Entry End Time	Employee AMPM	Approver End Date	Approver End Time	App... AM/...	Approver Web Access Until	Employee Web Access Until	Fiscal Year	Statistics Year	Can...
2015	SB	27	3	12/13/2015	12/21/2015	12/26/2015	12/13/2015	12/23/...	12:00	AM	12/24/20...	12:00	AM	12/31/2016	12/31/2016			
2007	TY	27	3	12/16/2007	12/29/2007	12/29/2007	12/16/2007	01/01/...	12:01	PM	01/01/20...	12:01	PM	12/31/2008	12/31/2008			
2019	BK	26	1	11/24/2019	12/07/2019	12/12/2019	11/24/2019	12/08/...	11:59	PM	12/12/20...	11:59	PM	09/30/2020	09/30/2020			
2019	SB	26	2	12/02/2019	12/15/2019	12/22/2019	12/02/2019	12/16/...	06:00	PM	12/18/20...	06:00	PM	12/31/2020	12/31/2020			
2018	BK	26	1	11/25/2018	12/08/2018	12/13/2018	11/25/2018	12/09/...	11:59	PM	12/13/20...	11:59	PM	09/30/2019	09/30/2019			
2018	SB	26	2	12/03/2018	12/16/2018	12/23/2018	12/03/2018	12/17/...	12:00	AM	12/18/20...	12:00	AM	12/31/2020	12/31/2020			
2017	BK	26	1	11/26/2017	12/09/2017	12/14/2017	11/26/2017	12/10/...	11:59	PM	12/14/20...	11:59	PM	09/30/2018	09/30/2018			
2017	BW	26	2	12/03/2017	12/16/2017	12/23/2017	12/03/2017	12/17/...	10:00	PM	12/18/20...	10:00	AM	12/31/2019	12/31/2019			
2017	SB	26	2	12/04/2017	12/17/2017	12/24/2017	12/04/2017	12/18/...	12:00	AM	12/19/20...	12:00	AM	12/31/2019	12/31/2019			
2016	BK	26	2	11/27/2016	12/10/2016	12/15/2016	11/27/2016	12/11/...	11:59	PM	12/15/20...	11:59	PM	09/30/2017	09/30/2017			
2016	BW	26	2	12/04/2016	12/17/2016	12/24/2016	12/04/2016	12/18/...	10:00	PM	12/19/20...	10:00	AM	12/31/2018	12/31/2018			

Account Detail Review Form (TSAAREV)

Account Detail Review Form - Student TSAAREV 9.3.11 (Core-PRD)

ID: 510000001 Mr. Matthew A. Allen, PHD. Credit Limit: User: SYSTEST08 Holds: Start Over

ACCOUNT DETAILS Master Settings Insert Delete Copy More Information Filter

Receipt

Detail Code *	Description *	Term *	Charge	Payment	Balance	Study Path	Source *	Effective Date *	Transaction Date	Aid Year	Period
CASH	Cash	201110		50,000.00	-50,000.00		T	06/16/2017	06/16/2017		
RFND	Refund Code - Negative Bal.	201110	50,000.00		50,000.00		T	08/08/2016	08/08/2016		
T101	Undergraduate Tuition	ARTERM	900.00		900.00		T	08/08/2016	08/08/2016		
RFDM	Refund Code - Manual	201110	5,000.00		5,000.00		T	08/08/2016	08/08/2016		
RFND	Refund Code - Negative Bal.	201110	2,000.00		2,000.00		T	08/08/2016	08/08/2016		

Before

Account Detail Review Form - Student TSAAREV 9.3.11 (Core-PRD)

ID: 510000001 Mr. Matthew A. Allen, PHD. Credit Limit: User: SYSTEST08 Holds: Start Over

ACCOUNT DETAILS Master Settings Insert Delete Copy More Information Filter

Receipt

Detail Code *	Description *	Term *	Charge	Payment	Balance	S... P	Effective Date *	Transaction Date	Aid Year	Period	Rece...	Original Charg...	Contract Detail *	Trans Number	Tra... Paid	...	Invoice Number	Invo... Paid	Feed	Feed Doc Num	Feed Date	User II	
CASH	Cash	201110		50,000.00	-50,000.00	T	06/16/2017	06/16/2017				2989			17				Y				FIMS
CASH	Cash	201110		125.00	0.00	T	08/08/2016	08/08/2016				2375			12				F	162211	08/08/2016		SYST
FDEP	Fee Deposit	201110		250.00	0.00	T	08/02/2016	08/02/2016				2308			10				Y				SYST
FDEP	Fee Deposit	201110		250.00	0.00	T	08/02/2016	08/02/2016							9				Y				SYST
RFND	Refund Code ...	201110	50,000.00		50,000.00	T	08/08/2016	08/08/2016							16	17	1	S0000315	F	162211	08/08/2016		SYST
T101	Undergraduat...	ARTERM	900.00		900.00	T	08/08/2016	08/08/2016							15			S0000315	F	162211	08/08/2016		SYST
RFDM	Refund Code ...	201110	5,000.00		5,000.00	T	08/08/2016	08/08/2016							14			S0000315	F	162211	08/08/2016		SYST
RFND	Refund Code ...	201110	2,000.00		2,000.00	T	08/08/2016	08/08/2016							13	1		S0000315	F	162211	08/08/2016		SYST
AMFE	Admissions ...	201110	75.00		75.00	T	08/02/2016	08/02/2016							11			S0000315	F	D0001...	08/08/2016		SYST
T101	Undergraduat...	201110	1,000.00		1,000.00	4	08/02/2016	08/02/2016							8			S0000315	Y				SYST

1 of 2 | 10 Per Page | Record 4 of 17

BALANCE DETAILS Insert Delete Copy Filter

After

Filter Data Presentation

Filter preferences by section, block or tab – users can:

- Save Basic or Advanced filter mode as your default setting
- Save filter field list and field order
- Save operator values for the fields selected
- Save specific data values for the fields selected

Available on all page locations presenting an active filter

“Restore Filter Settings” or “Restore All” – exit the page and reenter to refresh the display

Award Form (RPAAWRD) – Before

Basic Filter mode presents 5 fields when exercising the Filter

ellucian Award Form RPAAWRD 9.3.15 (Core-PRD) ADD RETRIEVE RELATED TOOLS 1

Aid Year: 1213 ID: 777121301 Test01 Student Start Over

Award Maintenance Award Schedule Disbursement Schedule Direct Loan Interface

FUND AWARDS Settings Insert Delete Copy More Information Filter

Basic Filter Advanced Filter

Fund Status Offered Accepted Paid Add Another Field ...

Clear All Go

Fund	Description	Status	Offered	Accepted	Declined or Cancelled	Memoed or Authorized	Paid	Schedule	Lock *	Unmet Need Override	Replace EFC Override	Tracking Requirem... Override	Federal Limit Override	Fund Limit Override	Fund Award Rule Override	Information Access	System
DIRECT	Federal Direct Stafford Loan	ACPT	1,000.00	1,000.00			395.00	<input type="checkbox"/>	N	N=No	N=No	N=No	N=No	N=No	N=No	<input checked="" type="checkbox"/>	M
PELL	Federal Pell Grant	ACPT	5,375.00	5,375.00	175.00		2,600.00	<input type="checkbox"/>	N	N=No	N=No	N=No	N=No	N=No	N=No	<input checked="" type="checkbox"/>	S
TEACHU	TEACH Undergraduate	ACPT	3,800.00	3,800.00	200.00		1,800.00	<input type="checkbox"/>	N	N=No	N=No	N=No	N=No	N=No	N=No	<input checked="" type="checkbox"/>	M
Totals			10,175.00	10,175.00	375.00		4,795.00										

1 of 1 Per Page Record 1 of 3

Award Form (RPAAWRD) – After

Filter settings saved to always display:

- Advanced Filter mode
- Fund = PELL, Status = no value, Offered \geq 1,000.00

ellucian Award Form RPAAWRD 9.3.15 (Core-PRD) ADD RETRIEVE RELATED TOOLS

Aid Year: 1213 ID: 777121301 Test01 Student Start Over

Award Maintenance | Award Schedule | Disbursement Schedule | Direct Loan Interface

FUND AWARDS Settings Insert Delete Copy More Information Filter

Basic Filter | **Advanced Filter**

Fund Equals ...

Status Equals ...

Offered Greater Than or Equal ...

Add Another Field ...

Clear All Go

Fund	Description	Status	Offered	Accepted	Declined or Cancelled	Memoed or Authorized	Paid	Schedule	Lock *	Unmet Need Override	Replace EFC Override	Tracking Requirem... Override	Federal Limit Override	Fund Limit Override	Fund Award Rule Override	Information Access	System
DIRECT	Federal Direct Stafford Loan	ACPT	1,000.00	1,000.00			395.00	<input type="checkbox"/>	N	N=No	N=No	N=No	N=No	N=No	N=No	<input checked="" type="checkbox"/>	M
PELL	Federal Pell Grant	ACPT	5,375.00	5,375.00	175.00		2,600.00	<input type="checkbox"/>	N	N=No	N=No	N=No	N=No	N=No	N=No	<input checked="" type="checkbox"/>	S
TEACHU	TEACH Undergraduate	ACPT	3,800.00	3,800.00	200.00		1,800.00	<input type="checkbox"/>	N	N=No	N=No	N=No	N=No	N=No	N=No	<input checked="" type="checkbox"/>	M
Totals			10,175.00	10,175.00	375.00		4,795.00										

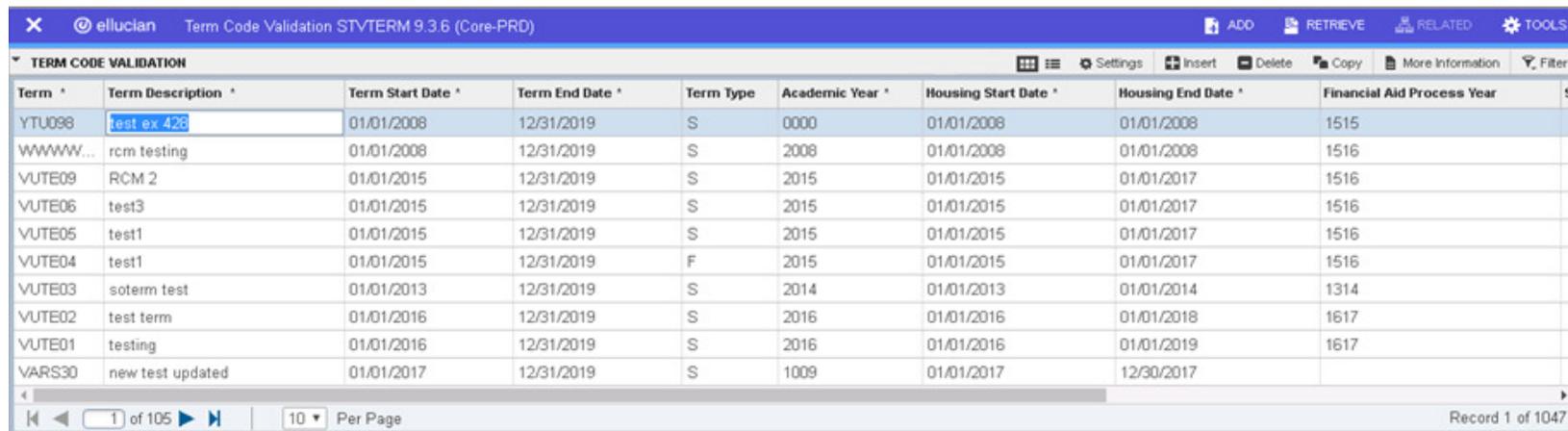
1 of 1 Per Page Record 1 of 3

Pagination Data Presentation

Pagination preferences by section, block or tab – users can:

- Persist the number of records displayed, as available to you in the drop-down box within the pagination bar

Ellucian delivered default of 10 records per page, resulting in 105 pages



The screenshot shows the Ellucian Term Code Validation interface. The table displays the following data:

Term *	Term Description *	Term Start Date *	Term End Date *	Term Type	Academic Year *	Housing Start Date *	Housing End Date *	Financial Aid Process Year	S
YTU098	test ex 428	01/01/2008	12/31/2019	S	0000	01/01/2008	01/01/2008	1515	
WWW...	rcm testing	01/01/2008	12/31/2019	S	2008	01/01/2008	01/01/2008	1516	
VUTE09	RCM 2	01/01/2015	12/31/2019	S	2015	01/01/2015	01/01/2017	1516	
VUTE06	test3	01/01/2015	12/31/2019	S	2015	01/01/2015	01/01/2017	1516	
VUTE05	test1	01/01/2015	12/31/2019	S	2015	01/01/2015	01/01/2017	1516	
VUTE04	test1	01/01/2015	12/31/2019	F	2015	01/01/2015	01/01/2017	1516	
VUTE03	soterm test	01/01/2013	12/31/2019	S	2014	01/01/2013	01/01/2014	1314	
VUTE02	test term	01/01/2016	12/31/2019	S	2016	01/01/2016	01/01/2018	1617	
VUTE01	testing	01/01/2016	12/31/2019	S	2016	01/01/2016	01/01/2019	1617	
VAR30	new test updated	01/01/2017	12/31/2019	S	1009	01/01/2017	12/30/2017		

The pagination bar at the bottom shows "1 of 105" records and "10 Per Page".

User Preference of 40 records per page saved, resulting in 27 pages



The screenshot shows the Ellucian Term Code Validation interface with the pagination bar updated to show "1 of 27" records and "40 Per Page".

Establishing Institutional Controls & Assigning Master Users

Installation Controls (GUAINST)

Provides an on/off control at the institution level

- Ellucian delivers this off (unchecked), by default

The screenshot displays the 'Installation Controls GUAINST 9.3.15 (BUILD)' interface. The 'INSTALLATION INFORMATION' section includes fields for Name (Ellucian University-1), House Number (2020), Street Lines 1-4, City/State/Zip (Malvern, PA, 19355), Nation (United States of America), and various system settings like Operating/System (UNIX), Installation Type (Higher Education), Instance Name (BUILD), and Base Currency (USD). The 'SYSTEM/PROCESS ENABLE INDICATORS' section contains the following checkboxes:

Indicator	Status
Online Matching Process Enabled	<input type="checkbox"/>
Workflow Enabled	<input checked="" type="checkbox"/>
SQL Trace Enabled	<input checked="" type="checkbox"/>
Messaging Enabled	<input checked="" type="checkbox"/>
User Preferences for Admin Enabled	<input checked="" type="checkbox"/>

The 'User Preferences for Admin Enabled' checkbox is highlighted with a red box.

Object Maintenance (GUAOBS)

Provides an on/off control at the individual page level

- Ellucian delivers this on (checked) for pages which have User Preferences for Admin applicable functionality

Object *	Description *	Type *	System *	Data Extract Option *	Banner&Banner9 Display Option *	Menu Option	User Preferences for Admin Option
FRA269R	Standard Report 269	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRA270B	Standard Billing 270	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRA272B	Standard Billing 272	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRA272R	Standard Report 272	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAAREV	Research Accounting Payments Entry	FORM	F	Key and Data Block	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRABDCN	Research Accounting Unbilled Status Control	FORM	F	Key and Data Block	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRABRUN	Run standard bills and reports	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRABUDG	Grant Budget	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRABUDP	Proposal Budget	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRACOLL	Grant Billing Collections	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAEVGA	Grant Events Assignment	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAEVNG	Grant Event Action	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAEVNP	Proposal Event Action	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAEVPA	Proposal Events Assignment	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAFFRR	Federal Financial Report	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAGENB	Generic Bill	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAGENR	Generic Report	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAGRNT	Grant Maintenance	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRAPROP	Proposal Maintenance	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRASYSC	Research Accounting System Control Form.	FORM	F	Not Available	Unified Menu All (Ban&Ban9)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Assigning Master User Responsibilities

The Master user has elevated privileges to set user preferences which propagate to all users

- A Master user is like BASELINE user functionality, but differs in that you can have multiple Master users across the institution

Each institution can determine how many Master users are needed and which departments/products they represent

- Configuration is in your hands!
- Best Practice Recommendation – align Master users to prevent co-occurrence updates

Master user responsibilities are assigned through Banner Security as a new security object delivered in the Banner General 8.11.2 release

How Do I Assign Master User Privileges?

Access the Oracle/Banner Security Maintenance (GSASECR) page

- Enter the appropriate User ID, then press the Modify button under the Permissions sub-block
 - This action will display the User/Class Privilege Maintenance section of the GSASECR page where the security object can be added
- Insert a new record and add the BAN_PERSISTENT_PROFILE_MASTER Object Name with a modifiable Role Name
 - The BAN_PERSISTENT_PROFILE_MASTER security object controls which users can act as a Master user

Please work with your department lead and security administrator to complete this setup

Oracle/Banner Security Maintenance (GSASECR)

Oracle/Banner Security Maintenance GSASECR 9.3.15 (BUILD)

Current User from Security: BANSECR

Users | Violations | Classes | Objects | Roles | Institution Profile | Dynamic SQL History

USER

User ID: SYSTEST08

User: Builder Admin

User

Create | Banner Rules | Alter | Delete

Permissions

Modify | Summary

2

User/Class Privilege Maintenance GSASECR 9.3.15 (BUILD)

USER

SYSTEST08

USER/CLASS PRIVILEGE MAINTENANCE

Active filters: Object Name: BAN_PERSISTENT_PROFILE_MASTER | Clear All

Count | Wild Card | User Classes | Copy Privileges

Object Name	Role Name
BAN_PERSISTENT_PROFILE_MASTER	BAN_DEFAULT_M

DETAILS

Copy All Tabs

Tab Name	External Tab Description
----------	--------------------------

10 Per Page

3

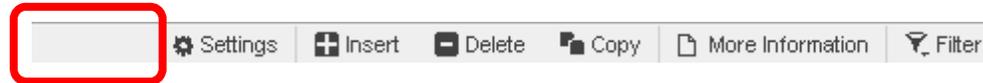
How Do I Perform Master User Functionality?

If User Preferences for Admin is active for a page and you have been assigned the Master user security object, you will see the Master checkbox next to Settings in the collapsible panel for each section, block and tab of that page

- When active and assigned Master privileges...



- When active and not assigned Master privileges...



To save Master preferences, select the Master checkbox and then press Settings.

- Once Settings opens, choose the action which you would like to perform – “Save...”, “Save All”, “Restore...” or “Restore All”
- Once saved, the Master checkbox will remain selected until you remove the check or leave the page

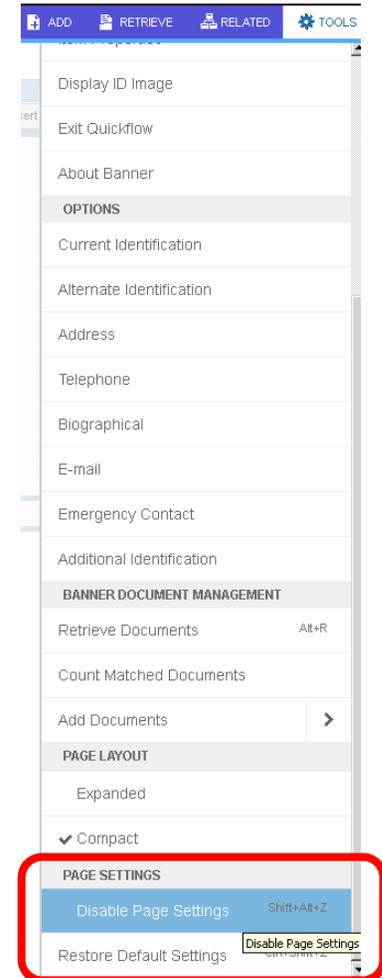
Master User Tools Menu Options

Master users can also use the Tools → Restore Default Settings option to restore Master settings for the entire page.

- The Master user must select each Master checkbox for each section/block/tab on the page where you want to remove the Master preferences: Tools → Restore Default Settings

Disable Page Settings (Shift+Alt+Z) is only provided to Master users and allows for quick temporary disabling of the User Preferences for Admin feature on a specific page

- Assists Master users if needing to troubleshoot
 - When pressed to disable, a check will appear next to Disable Page Settings
 - Press Disable Page Settings again to re-enable the User Preferences feature



Best Practices As A Master User

Restoring a Master user preference impacts all users who do not have a personal user preference saved for the same section, block, tab of a page

Master user preferences vs. personal user preferences

- A Master user can save both Master user preferences and personal user preferences for the same section, block, tab of a page; however, the ability to toggle between Master and personal preferences is under analysis for a future delivery.
 - This means a Master user can save a personal user preference and then save a Master user preference with the same settings. Once done, the Master user will see their personal user preferences combined with the assigned Master user preferences.
 - Recommendation: users should not apply both Master and personal preference settings on the same section, block, tab of a page, if possible.

Detail Transaction Activity (FGITRND) – Master User

ellucian Detail Transaction Activity FGITRND 9.3.12 (Core-PRD) ADD RETRIEVE RELATED TOOLS

COA: B Fiscal Year: 20 Index: Fund: Organization: Account: Program: Activity: Location: Period: Commit Type: Both Start Over

DETAIL TRANSACTION ACTIVITY Master Settings Insert Delete Copy Filter

Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Document *	Transaction Date *	Activity Date *	Description	Com
6111	11009	10	YTD	30.00	+	CR05	N0016946	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016947	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016948	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016941	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016942	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016943	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016944	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016945	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016937	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016938	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016939	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016940	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016932	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016933	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016934	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016935	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016936	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016927	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016928	07/01/2019	07/30/2019	Cash Receipt 1	U
6111	11009	10	YTD	30.00	+	CR05	N0016929	07/01/2019	07/30/2019	Cash Receipt 1	U
Total				1,033,624.94	+						

1 of 2768 20 Per Page Record 1 of 55343

EDIT Record: 1/55343 FGITRND.DISPLAY_ACCT_CODE [1] ©2000 - 2019 Ellucian. All rights reserved. ellucian

Required Releases, Documentation and User Training

Required Releases

Banner Admin Common 9.3.18

- Banner administrative framework changes supporting the bulk of this feature set

Banner General 9.3.15

- Enhancements to the Installation Controls (GUAINST) and Object Maintenance (GUAOBS) administrative pages

Banner General 8.11.2

- All database layer support required for this feature set

Documentation and User Training

Banner General Documentation

- Banner Transformed – Getting Started with Your Administrative Applications
- Banner Admin Common Release Guide 9.3.18
- Banner General Release Guide 9.3.15
- Banner General Release Guide 8.11.2
- Banner Admin Pages Installation Guide 9.3.18
- Banner General Security Administration Handbook – September 2019
- **User Training**
 - Leverage the Banner Transformed – Getting Started with Your Administrative Applications handbook
 - Utilize this recording for your users, as needed



Thank you.

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