

Customizing User Preferences in Banner 7

UNIVERSITY OF ILLINOIS
CHICAGO • SPRINGFIELD • URBANA-CHAMPAIGN

Office of Business and Financial Services
Training Center

HR|Administration
Department of Staff & Organization Development

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APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Due to the integrated nature of the various Human Resources, Finance, and Student modules in **Banner** and the reporting information in the Enterprise Data Warehouse (EDW), you may have access to information beyond what you need to perform your assigned duties. Your access to **Banner** and the EDW has been granted based on business need, and it is your responsibility to ensure the information you access is used appropriately.

Here are some reminders of good data stewardship to help you carry out your responsibility:

- Do not share your passwords or store them in an unsecured manner. Do not leave your workstation unattended while logged on to administrative information systems. You are responsible for any activity that occurs using your logon ID.
- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
- Regarding FERPA, the University of Illinois maintains individual records and information about students for the purpose of providing educational, vocational, and personal services to its students. It is University policy to comply fully with federal statutes and regulations regarding the confidentiality of student educational records. As required by the Family Educational Rights and Privacy Act (FERPA) of 1974, as amended, University policy outlines procedures covering the privacy rights of students. The policy is intended to ensure the confidentiality of student education records, to establish the right of students to inspect and review their education records, and to provide guidelines for the correction of inaccurate or misleading data.
- When disposing of reports containing confidential or sensitive information, shred the documents in a timely manner.

Your responsibilities regarding the protection and security of administrative information are outlined in the University of Illinois Information Security Policy for Administrative Information and Guidelines posted at http://www.obfs.uillinois.edu/manual/central_p/sec19-5.htm. Any violation could subject you to disciplinary action, which could include dismissal or, in those cases where laws have been broken, legal action. You should have signed a compliance form that indicates you have read, understand, and agree to comply with the University's Information Security Policy for Administrative Information. If you have not already signed the compliance form, please see your Unit Security Contact, who is responsible for maintaining these forms.

TABLE OF CONTENTS

Adding Your URLs to My Links	1
Steps to Customize My Links.....	1
Customizing Color Settings	3
Steps to Customize <i>Banner 7.2</i> Color Settings	5
Steps to Restore Colors to Default	6
Checking the Banner Message Link.....	7

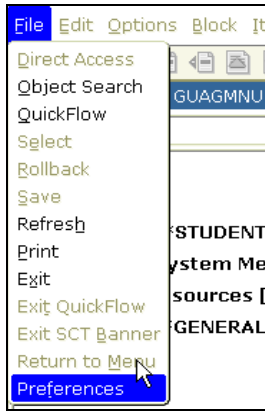
Adding Your URLs to My Links

In **Banner 7.2**, you can customize the URLs under the **My Links** section that appears on the main menu. These links open the defined URL in a new web browser when clicked once. The link to **My Institution** defaults to www.uillinois.edu, while the links to each campus link to each campus homepage. You can customize up to 6 links (including the default links to each campus homepage) using the **General User Preferences Maintenance Form (GUAUPRF)**.

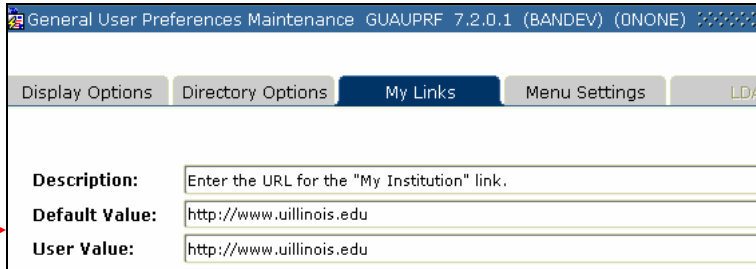
Steps to Customize My Links

To add your own personalized URLs to the **Banner 7.2** main menu's **My Links** section:

- From the **File** menu, select **Preferences**, or type **GUAUPRF** in the **Go To...** field and press **ENTER**.
The **General User Preferences Maintenance Form** will open.



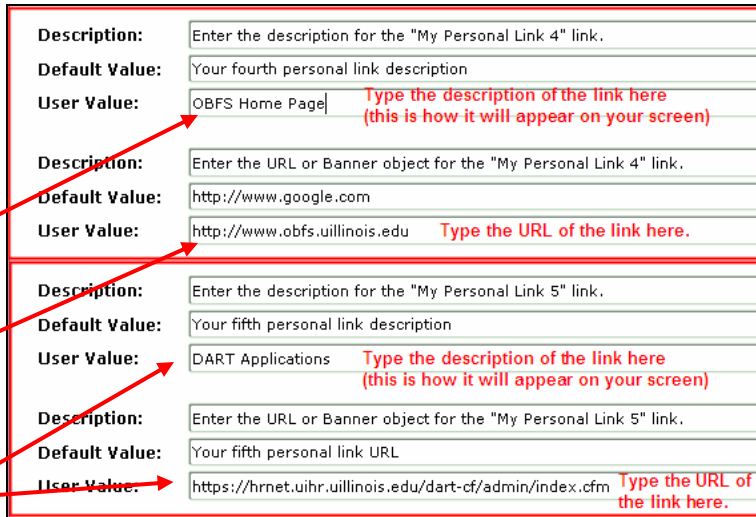
- Click the **My Links** tab.
- Add your URLs and descriptions in the **User Value** fields.



The first section of three lines is set to the **My Institution** link and you should not change that setting.

In any of the other sections of six lines, you can set values for your links.

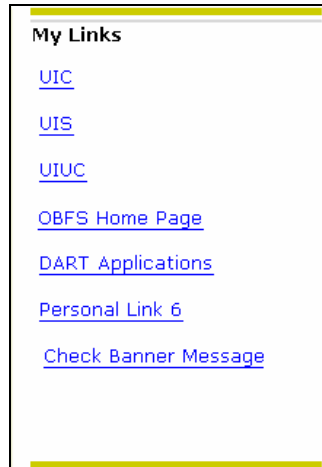
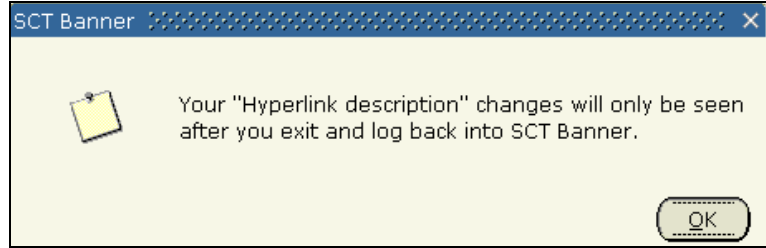
- In the first **User Value** field, type what you want your URL to be named. In this example, it is the OBFS home page.
- In the next **User Value** field, you will type the URL for your link. This example uses:
<http://www.obfs.uillinois.edu>



In the next sections, repeat steps **a.** and **b.** if you want to add more links.

Customizing User Preferences in Banner 7

4. Click the **Save** button or press F10 when you have added all of your links.
5. Click **OK** when you receive a message like the one to the right.
6. Click the **Exit** button on the **GUAUPRF** window to return to the **Banner** main menu.
7. Exit **Banner** completely.
8. Log into **Banner** again to see your personal links as you have programmed them. In the screen shot to the right, the links described in previous examples appear.



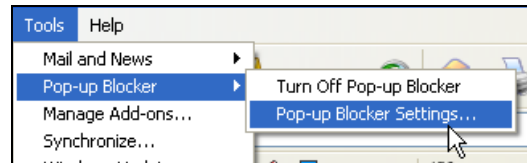
9. Click the desired link and your web page will open in a new browser window.



Note: If a new browser window does not open, it may be because your Internet Pop-up Blocker settings are not allowing the new browser window to open. You can test this by holding down the CTRL key on your keyboard while clicking the link. If this works, you can either:

- A) Change your Pop-up Blocker settings by accessing the **Tools** menu, **Pop-up Blocker**, **Pop-up Blocker Settings...** and adjusting your settings.

OR



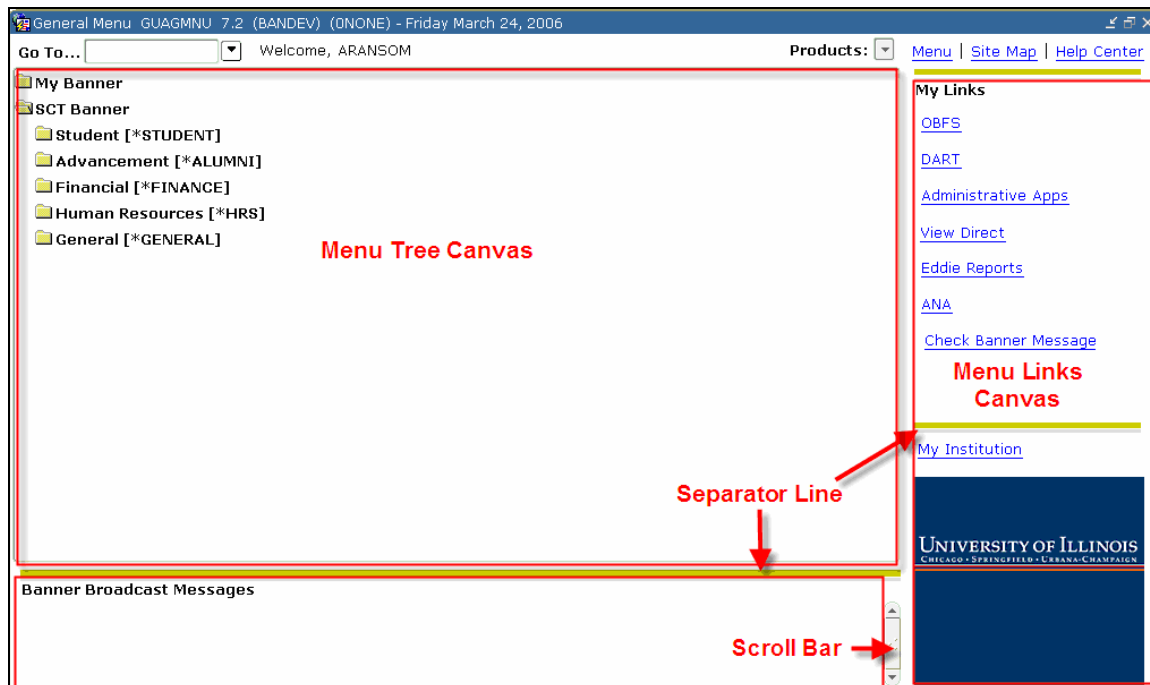
- B) Keep your Pop-up Blocker settings as they are and hold the CTRL key each time you open your links from **Banner**.

Customizing Color Settings

Using the **General User Preferences Maintenance Form (GUAUPRF)**, you can change your color settings for **Banner**. You can customize the color for the following areas:

- Non-iconic buttons – any button **not** on the toolbar
- Canvas – the background color of forms
- Code / description prompts – field names with a list of values associated with it
- Menu links canvas – color of the **My Links** section of the main menu
- Record highlighting – color of the record currently highlighted in a form
- Scroll bar – color of the scroll bar on the main menu or any form
- Separator line – color of the line separating sections in a form or on the main menu
- Menu tree canvas – color of the menu tree area of the main menu

Below are pictures indicating each of these areas.



Areas on main menu on which colors can be customized

Customizing User Preferences in Banner 7

Employee Leave Balances PEALEAV 7.0 [MC:37.0] (BANDEV) (ONONE)

ID: 655352986 Homer Simpson **Canvas**

Leave Balance Totals

Leave Code	Day or Hour	Total Begin Balance	Total Accrued	Total Taken	Current Available	Total Banked
FLHL FloatHol	H	.00	.00	.00	.00	.00
SHBN ShBen	H	.00	.00	.00	.00	.00
SICC CompSick	H	.00	.00	.00	.00	.00
SICK Sick	H	274.00	100.02	.00	374.02	.00
VACA Vacation	H	176.00	96.00	.00	272.00	.00
VACC VacBal	H	.00	.00	.00	.00	.00

Record Highlighting (points to SICC row)

Separator Line (points to yellow line above table)

Scroll Bar (points to vertical scroll bar on right)

Areas on forms on which colors can be customized

Employee Jobs NBAJOBS 7.1.0.1 (BANDEV) (ONONE)

ID: 655352986

Position: U65872 Suffix: 00

General Job Job Detail Payroll Default Deferred Pay Miscellaneous Excluded

Effective Date: 16-MAR-2005

Personnel Date: 01-FEB-2005

Status: Active

Title: Vst Staff Devlp (Trng) Mgr

Job FTE: 1.000

Appointment Percent: 100.00

Encumbrance Hours:

Encumbrance Indicator: System Calculated

Hours per Day: 8.00

Employee Class: BA Acad/Pro 12mth Ben Elig

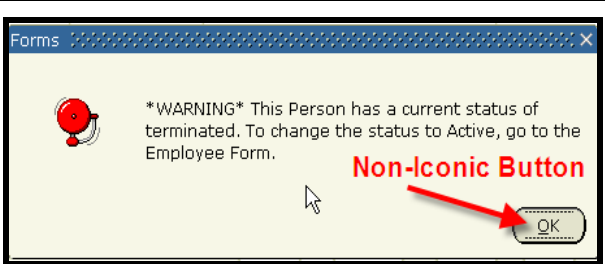
Leave Category: Y3 12/12 mth 2 FH 25

Change Reason: OT006 Data Correction

Employer Code: UI University of Illinois

Code / Description Prompts (points to Employee Class and Leave Category)

More areas on forms on which colors can be customized



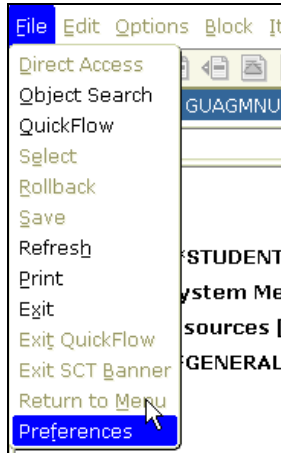
Non-iconic button: color can be customized

Steps to Customize *Banner 7.2* Color Settings

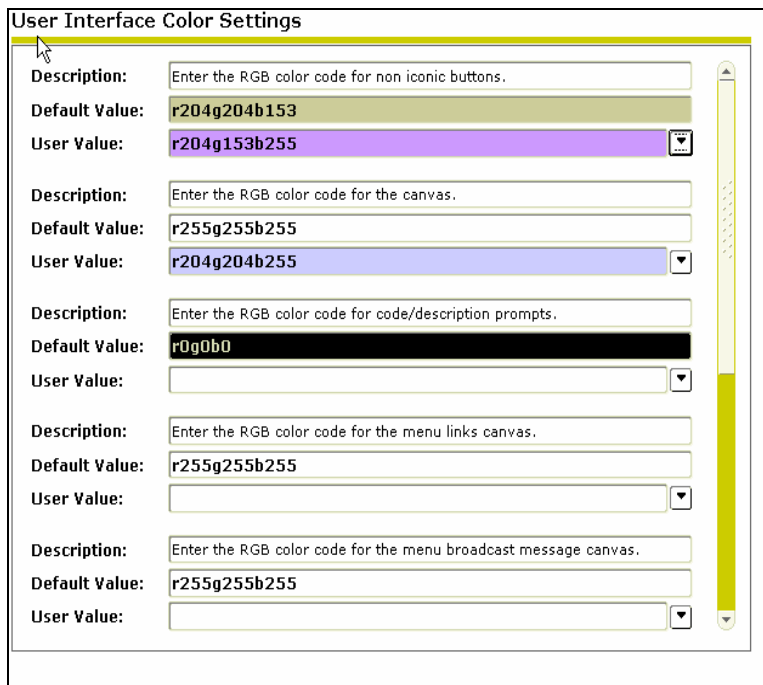


NOTE: You cannot make changes in *GUAUPRF* while forms are open.

1. From the **File** menu, select **Preferences**, or type *GUAUPRF* in **Go To...** field and press ENTER. The **Display Options** tab of *GUAUPRF* will open.




2. Observe the **User Interface Color Settings** section. From here, you can see default settings for various color categories, e.g., the canvas, buttons.
3. Click the **Search** icon in the **User Value** field to change a color for a category.
4. Click your selected color for the category. This will become the value shown in the **User Value** field.
5. Click **OK**.
Note: After you make a selection, you will see the selected color in the background of the **User Value** field.
6. Repeat steps 3-5 as needed.
7. Click the **Save** button or press F10 after you have changed the colors.
8. Click the **Exit** button on the *GUAUPRF* window to return to the *Banner* main menu.

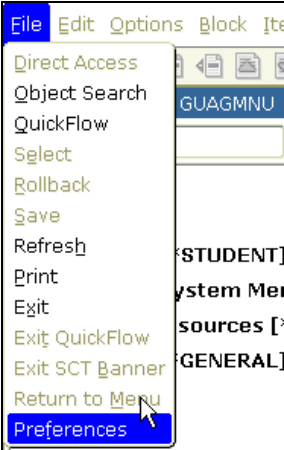
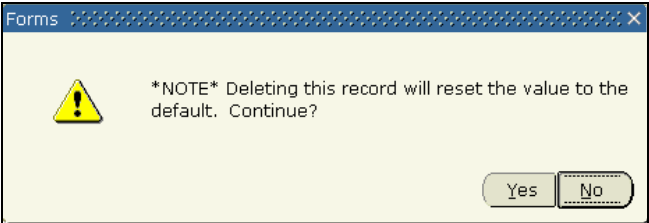


Steps to Restore Colors to Default

If you find you want to return any of the customized colors to the default colors, follow the steps below.



NOTE: You can not make changes in **GUAUPRF** while forms are open.

<p>1. From the File menu, select Preferences, or type GUAUPRF in Go To... field and press ENTER. The Display Options tab of GUAUPRF will open.</p>	
<p>2. Locate the color category you wish to change. Click in the User Value field.</p> <p>3. Select Remove from the Record menu. You will receive a warning as pictured on the right.</p> <p>4. Click Yes.</p> <p>5. Repeat steps 2-4 as needed.</p> <p>6. Click the Save button or press F10 after you have changed the colors.</p> <p>7. Click the Exit button on the GUAUPRF window to return to the Banner main menu.</p>	

Checking the Banner Message Link

If you are anticipating the approval of a **Banner** transaction that first must be reviewed by an Office of Business and Financial Services (OBFS) unit, you will need to periodically observe the **Check Banner Message** link under the **My Links** section of the **Banner** main menu. The presence of a green check mark (✓) to the right of the **Check Banner Message** link means that there is a message from an OBFS unit for the user. Clicking the link will open the **General Message Form (GUAMESG)** and reveal the message related to the **Banner** transaction.

If you are working in a **Banner** form, you may check for **Banner** messages by clicking the **View/Send Message** button located on the toolbar. There is no difference in the appearance of the button when a message is present.

