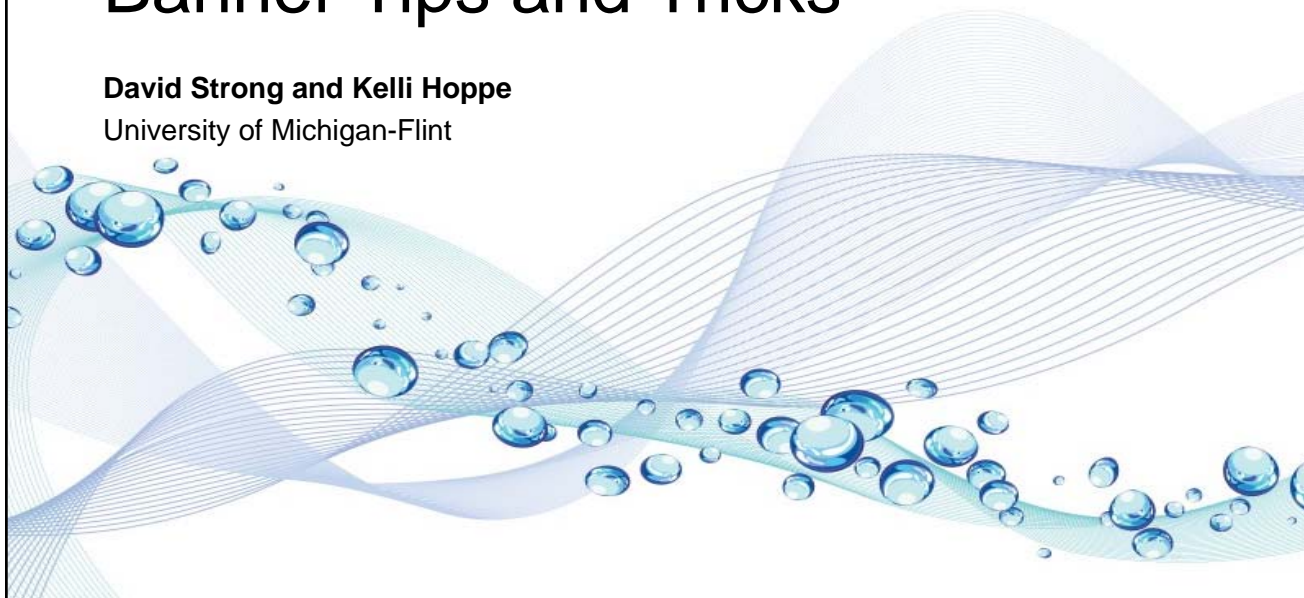


# Banner Tips and Tricks

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## Session rules of etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

**Thank you for your cooperation!**

## Introduction

- **Time to learn some of those tips and tricks that don't always get passed from user to user**
- **We've got a few tips and tricks to help you get things done faster and more efficiently**

## Agenda

- **General Tips and Tricks**
- **Financial Aid Tips and Tricks**
- **Loading a Population Selection**

# General Tips and Tricks



## General Tips and Tricks - Dates

### Is there a faster way to enter a date?

Today's date = t (type the letter t)

Date in current month = dd (2 digit day)

Date in current year = mmdd (2 digit month and 2 digit day)

Any other date = mmddyy (2 digit month, 2 digit day, and 2 digit year)

You **don't** have to type "10-MAR-2015"

## General Tips and Tricks – Parameter Sets

**Is there a faster way to enter parameters?**

**GJAPCTL**

Parameter Values		Parameters	Values
Number			
01	Application Code		
02	Word Processor Extract Option		
03	Print ALL Pending Letters		
04	Letter Code		
05	Sort Variable		
06	Term Code		
07	Module Code		
08	Audit Indicator		

## General Tips and Tricks – Parameter Sets

**GJAPCTL**

**Don't waste time typing in parameter values each time – save a parameter set instead!**

### 1. Fill in Values

Parameter Values		Parameters	Values
Number			
01	Application Code		FINAID
02	Word Processor Extract Option		1
03	Print ALL Pending Letters		N
04	Letter Code		FA_AWRD_MM_15
05	Sort Variable		
06	Term Code		201510
07	Module Code		R
08	Audit Indicator		N

## General Tips and Tricks – Parameter Sets

### 2. Check to Save Parameter Set

Submission

Save Parameter Set as

Name:

Description:

Hold

Submit

### 3. Give it a Name and Description

4. If you want to run the job immediately – click the submit button, otherwise click hold

### 5. Save

## General Tips and Tricks – Parameter Sets

The next time you want to use the same parameters you can either:

### 1. Type in the name of the parameter set

Process:

Parameter Set:

### 2. Select from all saved parameters from that job

Double-click on the line of the parameter set you want to use

Process	Parameter Set	Description	Activity Date
<input type="text" value="GLRLETR"/>	<input type="text" value="AWARD LETTERS"/>	<input type="text" value="Award Letters (weekly)"/>	<input type="text" value="06-AUG-2009"/>
<input type="text" value="GLRLETR"/>	<input type="text" value="EC"/>	<input type="text" value="EC TRACKING"/>	<input type="text" value="28-OCT-2013"/>
<input type="text" value="GLRLETR"/>	<input type="text" value="EMAIL"/>	<input type="text" value="Email AN"/>	<input type="text" value="18-OCT-2012"/>

## General Tips and Tricks – Parameter Sets

### **Want to copy a parameter set to another name?**

1. Bring up parameter set
2. In the submission area check to save the set and give it another name and description
3. Now you can change a few of the parameters without having to retype all of them

## General Tips and Tricks – Parameter Sets

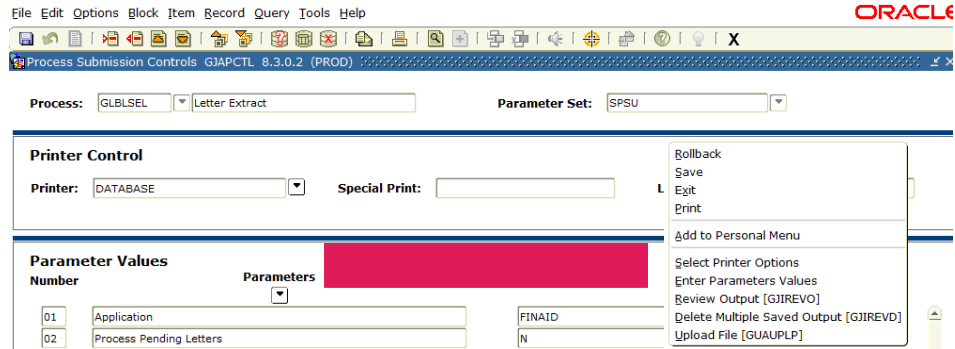
### **Want a particular parameter set to come up every time you open that job?**

1. Bring up parameter set
2. In the submission area check to save the set – DO NOT give it a name or a description
3. These parameters will now be set as the default parameters

## General Tips and Tricks – Reviewing Output

### Is there a faster way to get to the Options menu?

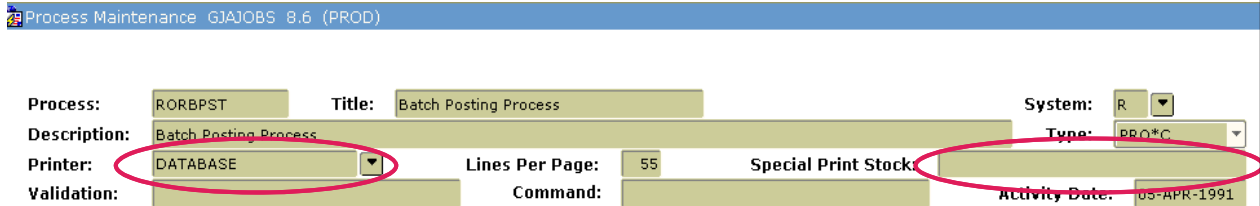
An easier way to select Options is to right-click from within the Parameter Block. Sometimes you must hold the click and release once the option (e.g. GJIREVO) has been selected.



## General Tips and Tricks - Default Printer

### How do I set a default printer?

Printer default can be set on GJAJOBS (Process Maintenance form):



## General Tips and Tricks - Keystrokes

**Direct Access to forms can be obtained with F5.**

### Useful Windows Keys:

- Win     Activate/Close the Start bar
- Win-M Minimize all Windows on the Desktop
- Win-L Lock the Desktop
- Win-E Windows Explorer
- Win-R Run a Program
- Win-D Restore/Clear the Desktop



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## General Tips and Tricks – Who's In a Popsel?

### **Need to know who is in a popsel?**

Can look in:

- GLAEXTR – view/update records in popsel
- GLIEXTR – view/count records in popsel

Can run:

- RORAPLT – basic applicant report

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## General Tips and Tricks – Who's In a Popsel?

### There is an easier way!

1. Open popsel in GLAEXTR or GLIEXTR
2. Click Help
3. Click Extract Data No Key
4. Click Save File

A csv file is created that can be opened in excel. Location set in GUAUPRF.

## General Tips and Tricks – Who's In a Popsel?

### How to Set Up – Extract Data No Key – useful in other columnar forms

#### GUAOBS

Object	Description	Type	System	Data Extract Option	Banner8/Banner9 Display Option
TSAAREV	Account Detail Review Form - Student	FORM	T	Data Block Only	Banner8 Only

#### GUAUPRF

Display Options Directory Options My Links Menu Settings LDAP

**Description:**

**Default Value:**

**User Value:**

## General Tips and Tricks - Enhanced Population Selection

### Want more complicated/powerful popsels?

Allows complicated sql code to refresh a popsel.

GTVSQPR – create a process code (e.g. POPSEL)

GTVSQPA – create the parameters (TERM and AIDY, commonly)

GORSQPA – tie together parameters and process

GTVSQRU – create a rule name (think GLRSLCT)

GORRSQL – stores the sql code used.

Single PL/SQL created by the University of South Florida to run the process. Once the Banner job is created, IT is done!

## General Tips and Tricks – Extremely Useful View #1

### Wouldn't it be nice to have a student record for each term?

SZVCSTU – current General Student (SGBSTDN) in effect for a term. A valuable suggested addition is class code, a calculation using the function `baninst1.f_class_calc_fnc`.

Select only the columns you need. As with all views, follow the suggested naming convention of exactly seven characters in the view name. This avoids rejection issues when used in popsel, letter variables, etc.

## General Tips and Tricks – “My Banner”

Ever wish you had easy access to your favorite banner screens or to the screens you can never remember?

You do – with “My Banner”

Set Up My Banner on [GUAPMNU](#)

- Search for forms and use arrow keys or
- Type form names

Object	Description
SHATERM	Term Sequence Course History
RPALORG	Direct Loan Origination
RNASL15	2014-2015 Student Loan Data
RRAAREQ	Applicant Requirements
RHACOMM	Applicant Comments Form
RBAPBUD	Applicant Period Budget
RNANA15	2014-2015 Need Analysis
SGASTDN	General Student
ROAENRL	Financial Aid Enrollment
RPAAWRD	Award Form Maintenance
ROASTAT	Applicant Status Form
SPAIDEN	General Person Identification
ROAIMMP	Applicant Immediate Process
RSIAREV	Account Detail Review Inquiry Form
READR15	2014-2015 Grant Origination/Acknowledgment Form
READI15	2014-2015 Grant Disbursement/Acknowledgment

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## General Tips and Tricks – “My Banner”

Save and click Menu and your “My Banner” will refresh

### My Banner

- Term Sequence Course History [SHATERM]
- Direct Loan Origination [RPALORG]
- 2014-2015 Student Loan Data [RNASL15]
- Applicant Requirements [RRAAREQ]
- Applicant Comments Form [RHACOMM]
- Applicant Period Budget [RBAPBUD]
- 2014-2015 Need Analysis [RNANA15]
- General Student [SGASTDN]
- Financial Aid Enrollment [ROAENRL]
- Award Form Maintenance [RPAAWRD]
- Applicant Status Form [ROASTAT]
- General Person Identification [SPAIDEN]
- Applicant Immediate Process [ROAIMMP]
- Account Detail Review Inquiry Form [RSIAREV]

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## General Tips and Tricks – Searching for Forms/Jobs

### Can't quite remember the name of a form/job?

Use a wildcard (%) to help your search

Go To...  ▾

Brings up:

Search Results	
Find %	
Desc	Code
Define Aid Periods	*ME.BP.FAY.3
Generate & Review Periodic Reports	*ME.MF.REA.1
Period Budgeting	*RESPRDSBUDG
Period Budgeting Control	*RESPRDSBUDG...
Student Centric Periods	*STUCENPERIOD
Sport Aid by Period	RAASPTM
Team Sport Period Aid	RAITMTM
Athletic Grant Period Roll	RAPAGRL
Period Budget Group Detail	RBAPBGD

Find QK Cancel

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## Financial Aid Tips and Tricks



## Financial Aid Tips and Tricks – Viewing Another Transaction

### Want to look at another transaction on an ISIR?

2014-2015 Need Analysis RNANA15 8.19 (PROD)

ID: [Redacted] [Redacted] Create Person Current Record:  Transaction Number: 1415  
 Source: EDE Sequence Number: 3 EDE Correction:  Number of Applications: 03

Demographic Plans and Educational Background Status Income and Assets Information Release

Lock Current:

## Financial Aid Tips and Tricks – Viewing Another Transaction

Rollback to the header and enter the sequence number of the transaction you want to view and then go to the next block. The transaction is then available to view (cannot make changes, but can review).

2014-2015 Need Analysis RNANA15 8.19 (PROD)

ID: [Redacted] [Redacted] Create Person Current Record:  Transaction Number: 1415  
 Source: EDE Sequence Number: 2 EDE Correction:  Number of Applications: 03

Demographic Plans and Educational Background Status Income and Assets Information Release

## Financial Aid Tips and Tricks – Needs Calc without Unlocking ISIR

**Want to run a needs calc on a locked ISIR?**

Use **RNAOVXX**

### Need Analysis Application

Current FM Record Source:   
 Sequence Number:   
 Lock Current Record:   
 Verification Message:

### Applicant Override

	<b>FM-Parent</b>	<b>FM-Student</b>
Budget Duration:	<input type="checkbox"/>	<input type="checkbox"/>
Dependency:	<input type="checkbox"/>	<input type="checkbox"/>
Calculate Parent Contribution for Independent Student:	<input type="checkbox"/>	<input type="checkbox"/>
Medical or Dental Expense:	<input type="checkbox"/>	<input type="checkbox"/>
Tuition Paid:	<input type="checkbox"/>	<input type="checkbox"/>
US Tax Calculation Option:	<input type="checkbox"/>	<input type="checkbox"/>
Other Income Allowance:	<input type="checkbox"/>	<input type="checkbox"/>
Other Assets:	<input type="checkbox"/>	<input type="checkbox"/>
Other Asset Allowance:	<input type="checkbox"/>	<input type="checkbox"/>

1. Click in a field in the Applicant Override area
2. Select Calc Need from the Options menu (or from the menu that appears when you right-click)

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## Financial Aid Tips and Tricks – Fund Code Naming

**Want to group funds based on funding source?**

Include a number in the beginning of the fund name.

1 = Federal (1PELL)

2 = University (2UG)

3 = State (3MIG)

Numbers appear before letters so all Federal are grouped together, then University, then State. (alphabetically within each group)

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## Financial Aid Tips and Tricks – Comments

**Want to be able to pull reports based on comments you have entered?**

Use category codes on RHACOMM.

Category codes can help you keep track of issues like:

- Holds
- SAP
- C-Flags
- Transfer Monitoring
- Revisions to Aid
- Budget Changes
- Scholarships
- Requirement Changes

## Financial Aid Tips and Tricks – Categories on RORPOST

**Want to be able to select a group of things to post all at once?**

Use categories on RORPOST

3. Any posting with that category code is automatically selected.

1. Enter category name here.

2. Click Select Category

3. Any posting with that category code is automatically selected.

Use Indicator	Category	Creator ID	Application Code	Selection ID	User ID	ISIR Type	ISIR Value	Type Code	Code to Post	Code to Post Algorithmic Rule
<input checked="" type="checkbox"/>	C-FLAG	DRSTRONG	FINAID	CFLAG_NEW_RECOR	KHOPPE	C	361	R	361	
<input checked="" type="checkbox"/>	C-FLAG	DRSTRONG	FINAID	CFLAG_NEW_RECOR	KHOPPE	C	362	R	362	
<input checked="" type="checkbox"/>	C-FLAG	DRSTRONG	FINAID	CFLAG_NEW_RECOR	KHOPPE	C	364	R	364	
<input checked="" type="checkbox"/>	C-FLAG	DRSTRONG	FINAID	CFLAG_NEW_RECOR	KHOPPE	C	365	R	365	
<input checked="" type="checkbox"/>	C-FLAG	DRSTRONG	FINAID	CFLAG_NEW_RECOR	KHOPPE	C	366	R	366	
<input checked="" type="checkbox"/>	C-FLAG	DRSTRONG	FINAID	CFLAG_NEW_RECOR	KHOPPE	C	367	R	367	
<input checked="" type="checkbox"/>	C-FLAG	DRSTRONG	FINAID	CFLAG_NEW_RECOR	KHOPPE	C	368	R	368	

## Financial Aid Tips and Tricks – Saving on RORPOST

### Want to save time saving on RORPOST?



1. Click Exit
2. Answer "Yes" to Save Changes

## Financial Aid Tips and Tricks – Dataload

### Want a better way to load in duplicates during dataload?

When there are very many Duplicates on dataload, keep the lowest transaction number, move the others out temporarily, and RCPMTCH and update the ones left. Bring back one set at a time until all are done. (Credit to Liberty University)



## Financial Aid Tips and Tricks – Dataload

### Want to type less file names when concatenating files?

Use a wildcard when concatenating files, e.g.

```
> filecat -i idsa16bk* -o 1516esar.tap
```

## Financial Aid Tips and Tricks – Extremely Useful View #2

### Is there a better way to find a comment code on an ISIR?

RZVESAR – narrows the search for ISIR comments and finds the current record. Example of a query for comment 359:

```
select rzvesar_pidm
from rzvesar
where rzvesar_aidy_code = '1516'
and rzvesar_comm_code = '359';
```

Compare this to how it would be done using RCRESAR!

## Financial Aid Tips and Tricks – Extremely Useful View #3

### Want an SAP record for each term?

RZVSATP – gives the Satisfactory Academic Progress status in effect for any student/term. The delivered view (ROVSAPR) gives only the greatest term code that exists. You can query past or future terms.

I added the status description and a code to display whether the status is satisfactory or unsatisfactory.

## Financial Aid Tips and Tricks – Algorithmic Budgeting

### Don't want to update period codes in your rules each year?

In order to keep RBRPBDR rules universal, use the :PERIOD variable on RBRABRC. We placed spring/summer in Sequence 2.

Algorithmic Budgeting Rules RBRABRC 8.18 (PROD)

Aid Year: 1415 Financial Aid Year 2014-15 Rule: UMF\_ROOM

Sequence: 1  Validated  Validate  Active  Test Rule User ID: Activity Date:

SQL Statement:

```
select roralgs_amt from roralgs
where roralgs_andy_code = :AIDY
and (:PERIOD like '%10' or :PERIOD like '%20')
and roralgs_key_3 = 'FAW'
and roralgs_key_1 = 'R+B'
```

## Financial Aid Tips and Tricks – Algorithmic Packaging

### Want to use fewer sequences?

Use a CASE statement to replace multiple sequences, keeping more code visible at one glance:

Algorithmic Packaging Rules RPRALGR 8.18.1 (PROD)

Aid Year:  Financial Aid Year 2014-15      Rule:  Rule for aw

---

Sequence:   Validated  Validate  Award Minimum:  User ID:   
 Active  Test Rule  Award Maximum:  Activity Date:

SQL Statement: 

```
SELECT ROUND(DECODE(RORSTAT_PGRP_CODE,UGRAD,1.0,HUGRAD,1.5)*DECODE(RORPRST_XES,'1',1.0,'2',.75,'3',.5,0)*
CASE WHEN RCRAPP2_PELL_PGI = 0 THEN 2700
      WHEN RCRAPP2_PELL_PGI BETWEEN 1 AND 4000 THEN 2400
      WHEN RCRAPP2_PELL_PGI BETWEEN 4001 AND 7000 THEN 600 END)
FROM RORSTAT,RCRAPP1,RCRAPP2,RORPRST
```

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## Loading a Population Selection

Did we miss anything?



## Loading a Population Selection

### **Do you have a list of IDs, PIDMs, or SSNs you want to put in population selection in Banner?**

- There is a simple program you can use to import these numbers from a comma separated value (.csv file) into a manual population selection.
- The easiest way to create a .csv file is to list the numbers in a column in excel and save the file as a .csv file. Then transfer/upload the file onto the server. The program will take care of the rest.
- There is an option in the program for which type of number you are using and to append or replace the numbers in the population.

## Summary

- **There are faster ways to do something, however it may require some initial set up**
- **If you have a better way to do something – share it with others**

## Questions & Answers

Did we miss anything?

The background of the slide features a series of overlapping, wavy lines in shades of light blue and white, creating a sense of movement. Scattered throughout these waves are numerous blue bubbles of varying sizes, some with highlights and shadows, giving them a three-dimensional appearance.

## Thank you!

Dave Strong ([drstrong@umflint.edu](mailto:drstrong@umflint.edu))

Kelli Hoppe ([khoppe@umflint.edu](mailto:khoppe@umflint.edu))

The background of the slide is identical to the one above, featuring light blue and white wavy lines and scattered blue bubbles of various sizes.