

Banner User Preferences

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

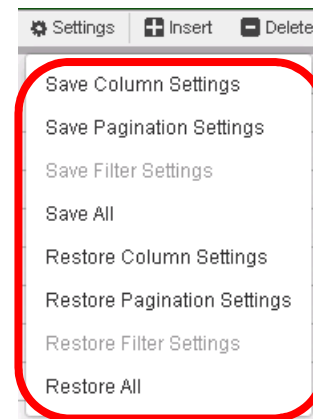
- Take it on the go, responsive design allows for User Preferences use on a tablet
- Supports the global market
 - Arabic, English Australian, English Great Britain, English India, English Ireland, French, French Canadian, Portuguese, Spanish languages

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

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

Example -Grids and Columns Data

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	+									

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Detail Transaction Activity (FGITRND) – After

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DETAIL TRANSACTION ACTIVITY Settings Insert Delete Copy Filter

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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		
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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	+									

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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

The screenshot displays a web application interface for 'Detail Transaction Activity FGITRND 9.3.12 (EWOK)'. The interface features a navigation sidebar on the left with icons for home, grid, search, and other functions. The main content area is titled 'DETAIL TRANSACTION ACTIVITY' and includes a 'Basic Filter' and 'Advanced Filter' section. The filter fields are as follows:

Field	Operator	Value
Account	Equals	
Organization	Equals	
Program	Equals	
Field	Equals	
Amount	Equals	
Add Another Field ...		

A context menu is open over the filter fields, listing the following options:

- Save Column Settings
- Save Pagination Settings
- Save Filter Settings
- Save All
- Restore Column Settings
- Restore Pagination Settings
- Restore Filter Settings
- Restore All

At the bottom right of the interface, there are buttons for 'Clear All' and 'Go'.

Award Form (RPAAWRD) – Before

Basic Filter mode presents 5 fields when exercising the Filter

The screenshot shows the 'Award Form RPAAWRD 9.3.15 (Core-PRD)' interface. The 'Basic Filter' mode is active, showing five empty filter fields: Fund, Status, Offered, Accepted, and Paid. Below the filters is a table with columns: Fund, Description, Status, Offered, Accepted, Declined or Cancelled, Memoed or Authorized, Paid, Schedule, Lock, Unmet Need Override, Replace EFC Override, Tracking Requirem..., Federal Limit Override, Fund Limit Override, Fund Award Rule Override, Information Access, and System. The table contains three rows: DIRECT (Federal Direct Stafford Loan), PELL (Federal Pell Grant), and TEACHU (TEACH Undergraduate). A 'Totals' row is at the bottom. The interface includes a 'Start Over' button and a 'Filter' dropdown menu.

Fund	Description	Status	Offered	Accepted	Declined or Cancelled	Memoed or Authorized	Paid	Schedule	Lock	Unmet Need Override	Replace EFC Override	Tracking Requirem...	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										

Award Form (RPAAWRD) – After

Filter settings saved to always display:

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

The screenshot shows the 'Award Form RPAAWRD 9.3.15 (Core-PRD)' interface. The 'Advanced Filter' mode is active. The filter fields are populated: Fund is set to 'PELL', Status is empty, and Offered is set to 'Greater Than or Equal' with a value of '1,000.00'. The table below shows only the PELL record. The interface includes a 'Start Over' button and a 'Filter' dropdown menu.

Fund	Description	Status	Offered	Accepted	Declined or Cancelled	Memoed or Authorized	Paid	Schedule	Lock	Unmet Need Override	Replace EFC Override	Tracking Requirem...	Federal Limit Override	Fund Limit Override	Fund Award Rule Override	Information Access	System
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

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" pages and "10 Per Page". The record count is "Record 1 of 1047".

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

The screenshot shows the pagination bar with the following details:

- Page: 1 of 27
- Records per page: 40
- Record count: Record 1 of 1047

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	MN	1	1	12/01/2019	12/31/2019	01/07/2020	12/01/2019	01/01/2020	10.00
2020	MN	2	1	01/01/2020	01/31/2020	02/07/2020	01/01/2020	02/01/2020	10.00
2020	MN	3	1	02/01/2020	02/29/2020	03/07/2020	02/01/2020	03/01/2020	10.00
2020	MN	4	1	03/01/2020	03/31/2020	04/07/2020	03/01/2020	04/01/2020	10.00
2020	MN	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			