Customizing User Preferences in Banner 7
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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.
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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:

1. 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.

2. Click the My Links tab.

3. 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.

   a) In the first User Value field, type what you want your URL to be named. In this example, it is the OBFS home page.

   b) 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.
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 **GUAPRF** 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.

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**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
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Areas on forms on which colors can be customized

More areas on forms on which colors can be customized
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Steps to Customize Banner 7.2 Color Settings

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

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

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. Locate the color category you wish to change. Click in the User Value field.

3. Select Remove from the Record menu. You will receive a warning as pictured on the right.

4. Click Yes.

5. Repeat steps 2-4 as needed.

6. Click the Save button or press F10 after you have changed the colors.

7. Click the Exit button on the GUAUPRF window to return to the Banner main menu.
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.