

The logo features a stylized brown boot with a wavy, ribbon-like shape extending from the heel, set against a light beige background with green mountain-like shapes at the top and bottom. The text "Banner Boot Camp" is centered in a bold, olive-green font.

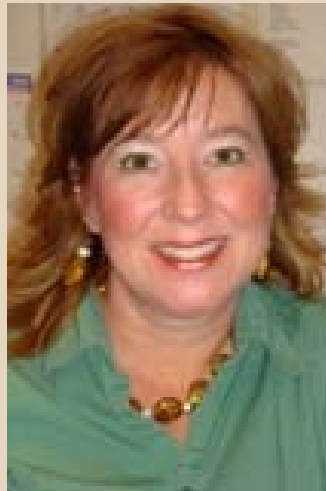
Banner Boot Camp

Topics for Discussion

- Welcome and Introductions
- The Team
- What is Banner?
- What is OIIT?
- Resources
- Overview of Banner Baseline
- Overview of Georgia Enhancements
- Break out sessions: Financial Aid, Records and Admissions, and Accounts Receivable

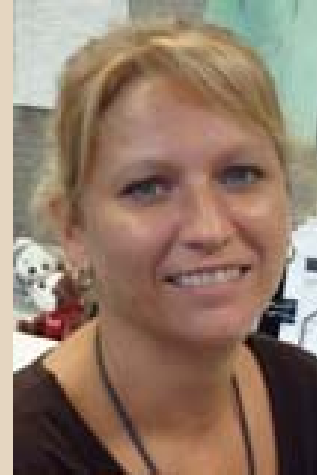
The Team

- **Karen Nunn**
 - **Banner Project Director**



The Team

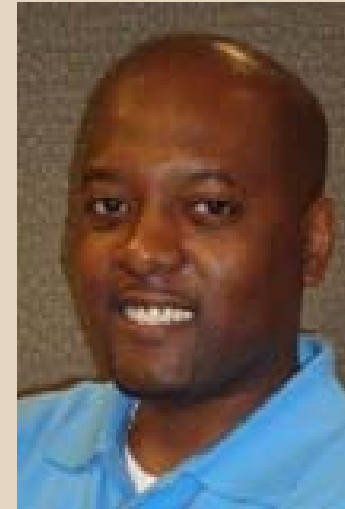
- Hope Dunagan
 - Business Systems Analyst III
 - Release Coordinator
 - Student



- Amanda Marshall
 - Business Systems Analyst III
 - Projects
 - Accounts Receivable

The Team

- Trent Tucker
 - Business Systems Analyst III
 - Student
 - SSC Project



- Cindy Taylor
 - Business Systems Analyst III
 - Student
 - SSC Project

The Team

- **Deidre Crawford**
 - Business Systems Analyst III
 - Integration Lead
 - Accounts Receivable



- **Tania Pittman**
 - Business Systems Analyst III
 - Financial Aid
 - Accounts Receivable
 - TouchNet

The Team

- Kay Gray
 - Business Systems Analyst III
 - GOML



- Julia Grubbs
 - Business Systems Analyst II
 - Student
 - Change Review

The Team

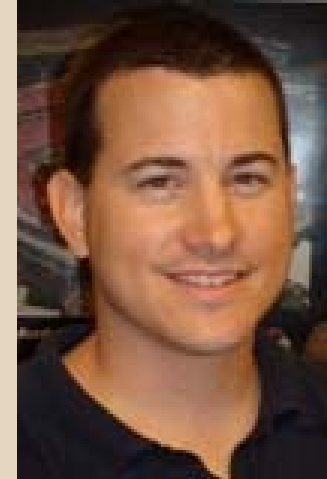
- John Broz
 - Business Systems Analyst I
 - Student



- Aneka Jackson
 - Business Systems Analyst I
 - Student

The Team

- **John Young**
 - Business Systems Analyst I
 - Financial Aid
 - Back up Release Coordinator



- **Nicole Pittard**
 - Technical Writer

The Team

- Provide production support for 34 USG institutions.
- Test and certify Baseline and Georgia Enhancement releases.
- Write user documentation, test plans, and workbooks.
- Resources for ancillary projects.
- Combined over 143 years experience in Higher Education.

Core Operating Principles

- **Production Support Comes First:** Our top priority is providing high-quality support to USG production services, regardless of whether the services are managed by ESS or by the System institutions.
- **Deliver What We Promise:** We will set and meet delivery dates on projects to which we have committed through the use of sound project management forecasting techniques.
- **Communicate Often:** We will continually communicate with our program stakeholders to keep them informed of our plans and solicit their valuable feedback.

What is Banner?



Banner

What is Banner?

- Banner is a Student Information System
- A product of SunGard Higher Education
- Consists of various modules
- OIIT supports:
 - Accounts Receivable
 - Financial Aid
 - Student
 - Self-Service

What is Banner?

- **Accounts Receivable:**
 - Bursar's Office
 - Business Offices
- **Financial Aid:**
 - Financial Aid Office
 - Student Loans, Scholarships
- **Student:**
 - Admissions Office
 - Registrar's Office
 - Housing
 - Residency
 - Graduation
- **Self Service:**
 - Self Service for students, faculty, staff and advisors



What is OIIT?

Overview

- What's Up?
- Program Improvement
- Change Review
- Beta Testing and Beta Sites

What's Up?



What's Up?

- Primary responsibility is **Production Support**
 - Average number of tickets per week: approx. 25
 - Requests range from upgrade assistance to implementation of functionality to problems running software.
 - Production Support Check List
 - Notify user the case is under review
 - Review the Help Desk Case
 - Request additional information
 - Search case logs for an identical or similar problem previously reported and/or resolved.

What's Up?

– Production Support Check List (continued)

- Search the Action Web for known issues for Baseline issues reported.
- Pull together any necessary documentation needed to test the reported issue.
- Set up and test the issue reported to duplicate internally.
 - Baseline: Issue not duplicated should be submitted to Action Line for resolution.
 - GaMods:
 - » Forms: Regenerate the form
 - » Processes: Recompile and Request file size
 - » Defects: Notify Release Coordinator

What's Up?

- Production Support Check List (continued)
 - Discuss with Senior SME's if issue remains unresolved following the above steps.
 - Provide user with resolution.

What's Up?

- **SLA:**
 - **Priority 1 (Urgent): Production Down:** 1 hour response, 12 hours resolution
 - **Priority 2 (High): Production Critical:** 2 hours response, 48 hours resolution
 - **Priority 3 (Medium): Standard, Production Normal:** 4 hours response, 4 days resolution
 - **Priority 4 (Low): Standard, General Questions:** 4 days response, 3 weeks resolution

What's Up?

- Major responsibility is software release management:
 - Change Review
 - Focus Groups
 - Design Specifications
 - Development
 - Testing and certification
 - Documentation
 - Distribution

Program Improvement



Program Improvement

- **Enhancements**
 - Continued program improvement to current functionality.
- **Defect corrections**
 - Resolutions for reported issues related to delivered software
- **Technology advancements**
 - Updates to software platforms

Program Improvement

- SunGard HE releases major point updates to the Student software twice a year.
- Financial Aid regulatory releases three to four times a year.
- Patches are released daily by SunGard HE.
- OIIT accumulates a month's worth of patches and releases in bulk to aid campus software administration.

Program Improvement

- **Install**
- **Review for impact on supported GaMods**
- **Initiate development if needed**
- **System Test**
- **Documentation: Test Plans, Workbooks, User Documentation, Release Announcement**

Program Improvement

- Beta test
- Regression and Remediation
- Certification
- Packaging
- Production release

Program Improvement

- **Major Projects:**
 - Banner V8 Upgrade
 - Georgia ONmyLINE
 - DegreeWorks
 - GSFC Auditing Tool Kit
 - Modifications necessitated by the PSFIN Consolidation

The projects listed are only highlights of the on-going projects supported by the GaBEST Production Support Team.

Program Improvement

- **Upcoming Releases:**

- **June 2009**

- Distance Education Flat Fee Form (ZSAFFEE)
 - Campus Data Extraction Process (ZORELCA)
 - Self-Service Release of Banner Holds
 - Self-Service Student Information Status Summary

- **September 2009**

- AR Reconciliation Report (ZGRRCON)
 - Self-Service Attendance Verification

Change Review



Change Requests

- 26 Change Requests approved and delivered as Georgia Enhancements in the last two years
- 10 Change Requests approved and currently in development
- Future releases:
 - 2009
 - Fin Aid Reconciliation Process (ZHRFARR)
 - A/R Reconciliation Report (TGRRCON)
 - Attendance Verification (ZHRNOSH)
 - Satisfactory Academic Progress Applicant Form (ZOASAPR)
 - Campus Data Extraction Process (ZORELCA)
 - Distance Education Flat Fee Form (ZSAFFEE)

Beta Testing and Beta Sites



Beta Testing

- Requested of all USG institutions for Georgia Enhancements and Baseline Releases.
- Requires institution to sign a Beta Test Agreement.
- Location of software, test plans and workbooks provided when agreement received.
- Institutional user provided with deadline for testing results.

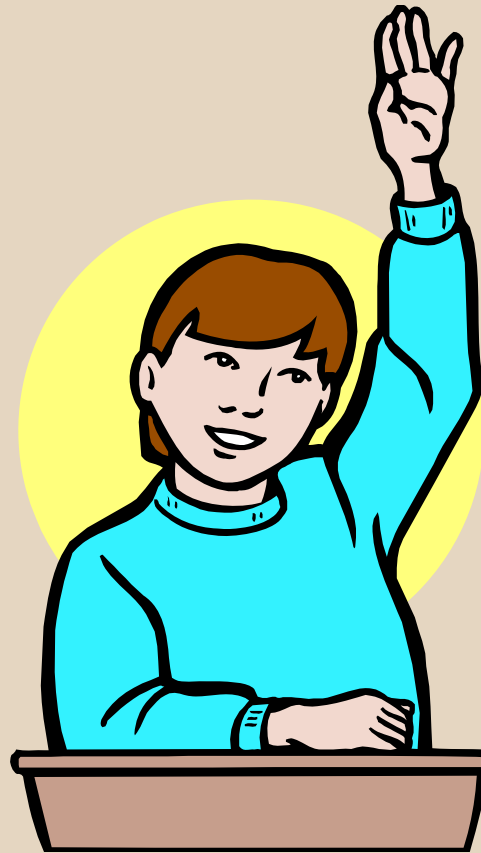
Beta Testing

- Questions/issues reported to ban_test@usg.edu.
- Business Analyst will contact the user to provide assistance.
- Test results reported to ban_test@usg.edu.
- Remediation and regression testing of software if necessary.
- Software production released.

Beta Sites

- **Beta sites from April 1, 2008 through March 31, 2009:**
- Abraham Baldwin Agricultural College, Albany State University, Armstrong Atlantic State University, Atlanta Metropolitan College, Augusta State University, Bainbridge College, College of Coastal Georgia, Columbus State University, Darton College, East Georgia College, Fort Valley State University, Georgia College and State University, Georgia Gwinnett College, Georgia Highlands College, Georgia Institute of Technology, Georgia Perimeter College, Georgia Southern University, Georgia Southwestern State University, Georgia State University, Kennesaw State University, Middle Georgia College, Savannah State University, South Georgia College, State University of West Georgia, University of Georgia, Valdosta State University and Waycross College.

Questions





Resources

Overview

- **Background**
- **Symposium**
- **Documentation**
 - Baseline
 - Georgia Enhancements
- **Web Sites**
 - SunGard's UDC
 - Banner Production Support
- **List Servs**
- **User Groups**
- **Wimba Sessions**
- **Proprietary Information**

Background

- SunGard HE and OIIT provide a number of resources to assist the user community in utilizing the functionality available in Banner as part of Baseline and the Georgia Enhancements.

Symposium

- Offers Computer Based Training (CBTs) and Workbooks for Banner Baseline functionality.
 - <http://symposium.sct.com/cp/home/loginf>
 - User name and password required to access
 - Contact OIIT Customer Services for account creation

Symposium



SUNGARD HIGHER EDUCATION

Symposium

Secure Access Login

User Name:

Password:

Login

Cancel

[Having problems logging in? Click here.](#)

To obtain a user name and password, [email the following information:](#)

- ◆ Name
- ◆ Institution
- ◆ Email
- ◆ Phone

You will receive access via email within 2 business days.

Please note: To receive a username and password, you must be a current client of SunGard Higher Education.

Welcome to SunGard Higher Education Symposium hosted by Education Practices

Education Practices recognizes that the learning needs of every institution and every individual are different. Everyone has distinct needs and preferences for the delivery format, class location, and course content. Education Practices' offers a comprehensive training program so that you can choose the training solution that makes sense for you and your organization.

Education Practices offers:

- ◆ Needs Assessments
- ◆ Training Plans
- ◆ Training Workbooks*
- ◆ Computer-based training (CBTs)*
- ◆ Training Workshops
- ◆ Instructor-led training
- ◆ Live,online learning

*available now, login to see these offerings

What's Inside?

Symposium provides a secure online learning community which allows clients to access training materials such as workbooks and CBTs. This training vehicle allows for 24/7 access to anyone with an active account. Symposium is the next step in our efforts to help your institution achieve its missions and goals.

User Documentation

- **Baseline**

- Documentation Bookshelf distributed to all institutions.
- Provides information regarding the baseline product functionality.
- Distributed quarterly by SunGard HE.

User Documentation

- **Baseline**

Chapter 4

Student Accounts Receivable Procedures

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Change an Existing Set of Accounting Distribution Values.	4-7
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Advantages of using a Common Set of Detail Codes.	4-8
Optional Use of Term-Based Detail Codes	4-8
Implementation of the Term-based Detail Code Interface	4-9
Term-based Detail Codes Use	4-10
Associate an Effective Date with an Accounting Distribution	4-10
Change an Existing Set of Accounting Distribution Values, Term-based to Term-based	4-11
Change a Detail Code from Term-based to Non-Term-based	4-11
Change a Detail Code from Non-Term-based to Term-based	4-12
Change an Existing Set of Term-based Designator Codes	4-12

User Documentation

● Baseline

Term-Based Detail Codes Set-up

The use of Term-Based Detail Codes allows term-specific accounting information to feed to the Banner Finance System or to another Finance system.

Note: For information about non-term-based detail codes, refer to “Non-Term-Based Detail Codes Use” on page 4-7.



This interface enables institutions to associate charges and revenues with the term or semester in which the charges are accrued. These charges and revenues are fed to Finance to specific accounts, depending on whether the revenue is being posted against prior, current, or future term charges.

Advantages of using a Common Set of Detail Codes

You use a common set of detail codes for each term, even if the accounting distributions associated with those detail codes change from term to term. Advantages include the following:

- Replaces the need to create unique detail codes for each term for charges that are term-specific until the end of time.
- Saves you from relearning detail codes for each term (that is, for tuition).
- Reduces maintenance overhead and makes the review of reports easier.

You may define prior, current, and future terms and modify them by updating the rules on the Term-Based Designator Rules Form (TSATBDS). This is useful for schools which account for charges, payments, and financial aid differently for prior, current, or future terms.

User Documentation

- Georgia Enhancements
 - Procedural
 - Includes step by step instructions for the user to successfully set up and execute functionality
 - Provided quarterly for all enhancements and new functionality included in Georgia Enhancements releases.

User Documentation

• Georgia Enhancements

Using the HOPE Module
Georgia Enhancements

Office of Information
and Instructional Technology

HOPE Process Flow

Description of HOPE

The HOPE Process establishes a standard procedure for institutions to use that calculates transfer and institutional hours to determine HOPE eligibility for Financial Aid. It also provides the ability to produce invoices to be sent to the Georgia Student Finance Commission (GSFC) and load return files from the GSFC into Banner.

The HOPE Process flow includes the following major steps:

- Setting up codes and rules
 - Creating HOPE rules for each HOPE fund code
 - Calculating HOPE
 - Verifying HOPE results
 - Creating an extraction file and submitting it to the GSFC
 - Loading the file returned from the GSFC
 - Reconciling HOPE funds
-

HOPE Eligibility Tracking Information

The following HOPE Scholarship Programs, which are administered by the GSFC, provide significant student financial aid funding to Georgia students:

- HOPE Scholarship Program for Degree-Seeking Students
- HOPE Scholarship Program for Students Seeking Diploma/Certificate
- HOPE Scholarship Program for Students Attending Georgia Private Colleges and Universities
- HOPE Scholarship Program for GED Recipients
- HOPE Promise Scholarship
- HOPE Promise II Scholarship
- HOPE Teachers Scholarship
- HOPE Accel Program for High School Students attending Georgia College and Universities

User Documentation

• Georgia Enhancements

Using the HOPE Module
Georgia Enhancements

Office of Information
and Instructional Technology

Using HOPE



Introduction to Setup



I.

Setting Up HOPE Codes and Rules

The first major step in the HOPE Process is setting up HOPE codes and rules.

In the Detail Code Control Form (ZSADETC), create detail codes for each HOPE fund code represented in the Fund Base Data Form (RFRBASE). Establish a fund code with the detail code assigned for each HOPE fund that your institution receives and awards. Each HOPE fund also has an associated book fund. Detail code rules for each of the HOPE funds are established in the Fund Management Form (RFRMGMT).

The indicators in the HOPE Fund Code Rules Form (ZFRHOPE) provide the grant type information that the GSFC uses for processing records.

Establish the cross-reference rules for the detail category codes associated with a fund code in the EDI Cross-Reference Rules Form (SOAXREF).

1. Create Detail Codes

Create detail codes to be associated with the HOPE fund codes in the Detail Code Control Form (ZSADETC).

The screenshot displays the 'Detail Code Control Form - Student ZSADETC 7.6' with three rows of data entry fields. Each row corresponds to a different detail code:

- Detail Code: 1001** Semester Tech Fee-US. Type: C, Refund Code: [dropdown], Pay Type: N, Tax Type: G. Category: FEE, Grant Type: [dropdown], Priority: 999. Options: Direct Deposit, Like Term, Like Aid Year, GI, Enterable, Active, Institutional Charges, Exclude Invoice Print, Payment History.
- Detail Code: 1002** In-state tuition-Spring. Type: C, Refund Code: [dropdown], Pay Type: N, Tax Type: G. Category: TUI, Grant Type: [dropdown], Priority: 999. Options: Direct Deposit, Like Term, Like Aid Year, GI, Enterable, Active, Institutional Charges, Exclude Invoice Print, Payment History.
- Detail Code: 1005** In-state tuition-Summer. Type: C, Refund Code: [dropdown], Pay Type: N, Tax Type: G. Category: TUI, Grant Type: [dropdown], Priority: 999. Options: Direct Deposit, Like Term, Like Aid Year, GI, Enterable, Active, Institutional Charges, Exclude Invoice Print, Payment History.

Each row also includes a 'Defaults' section with fields for Amount, Term, and Effective Date.

User Documentation

- Georgia Enhancements Workbooks
 - Descriptive summary with step by step instructions for the set up and use of new functionality or significant enhancements

User Documentation

- Georgia Enhancements Workbooks

Introduction Office of Information and Instructional Technology

Self-Service Retrieve ID Introduction

Purpose

As part of the Student System Consolidation Project, OIIT is providing an enhancement for retrieving a student's institutional ID via Self-Service Banner. With the conversion to unique IDs instead of Social Security Numbers as the student's institutional ID came the need to provide the institutional ID to the student in a secure manner. Students must obtain their institutional ID in order to log into Student Self-Service Banner and use other institutional services. The Self-Service Retrieve ID page allows the user to enter identifying data to retrieve the institutional ID.

To retrieve your institutional unique ID, please enter the required information.
**Be sure to enter the name the institution has on record for you.

First Name:

Last Name:

Birth Date: MM/DD/YYYY

Last 4 Digits of SSN:

RELEASE: 7.4 powered by
SUNGARD HIGHER EDUCATION

User Documentation

- Georgia Enhancements Workbooks

Access the Retrieve ID button

On the main menu of Self-Service Banner, select “Enter Secure Area” and then select the “Retrieve ID” button.

The screenshot displays the SUNGARD HIGHER EDUCATION login interface. On the left, a navigation menu includes 'Enter Secure Area', 'Prospective students', 'Admissions Information and Application Status', 'General Financial Aid', 'Class Schedule', 'Course Catalog', 'Transfer Articulation', and 'Secure Reports'. The 'Enter Secure Area' option is highlighted with a blue arrow pointing to it from a callout box. Below the menu, it says 'RELEASE: 7.4'. The main content area features a header with the SUNGARD HIGHER EDUCATION logo and a navigation bar. Below this, there is a login form with the following text: 'Please enter your User Identification Number (ID) and your Personal Identification Number (PIN). When finished, select Login.', 'Please Note: ID is Case Sensitive', and 'To protect your privacy, please Exit and close your browser when you are finished.' There are input fields for 'User ID:' and 'PIN:'. Below the fields are three buttons: 'Login', 'Forgot PIN?', and 'Retrieve ID'. A blue arrow points from a callout box to the 'Retrieve ID' button. The callout box contains the text: 'Access the Retrieve ID button on the main login page.' At the bottom of the page, it says 'RELEASE: 7.4' and 'Powered by SUNGARD HIGHER EDUCATION'.

Web Sites

- SunGard Customer Support Center
 - http://connect.sungardhe.com/customer_support
 - Includes the following:
 - Request for Product Enhancements (RPEs)
 - Defects
 - Frequently Asked Questions (FAQs)
 - Service Requests
 - Documentation Downloads

Web Sites

- SunGard Customer Support Center

The screenshot shows the SunGard Higher Education Customer Support Center website. The header includes the SunGard logo and navigation links for My Account, Help, Contact Us, and Log In/Out. A search bar is located in the top right. The main content area is divided into two columns. The left column contains a welcome message and a login prompt. The right column contains a login form with fields for User ID and Password, a checkbox for 'Remember my User ID and Password', and buttons for 'OK', 'Forgot Your Password?', and 'Request a Customer Support Center Account'. The date 'Friday, April 25, 2008' is displayed in the top right of the main content area.

SUNGARD HIGHER EDUCATION My Account | Help | Contact Us | Log In/Out

Customer Support Center Search: Go [Advanced Search](#)

Customer Support Center Home: Friday, April 25, 2008

Welcome to the Customer Support Center

The Customer Support Center is your one-stop web site for obtaining technical information and support for your SunGard Higher Education products.

Log in to access a wealth of information regarding your SunGard Higher Education products, including the latest product information, frequently asked questions, documentation and downloads.

Customer Support Center Login

* Fields with * are required fields.

*User ID:

*Password:

Remember my User ID and Password

[Forgot Your Password?](#)

[Request a Customer Support Center Account](#)

Web Sites

• SunGard Customer Support Center

The screenshot displays the SunGard Higher Education Customer Support Center website. The header includes the SunGard logo and navigation links for My Account, Help, Contact Us, and Log In/Out. A search bar is located in the top right. The main content area is divided into several sections: a personalized welcome message for Amanda Marshall, a Self Service section with links to the Knowledge Base and Documentation & Download Center, a My Account section with various service request and defect tracking options, an Announcements section with news about the Banner 8 Unified Product Release, a Solutions/FAQs section, and a Contact Us section with a link to request a support account.

SUNGARD HIGHER EDUCATION My Account | Help | Contact Us | Log In/Out


Customer Support Center | **Featured Solutions**


Search: Go [Advanced Search](#)

Customer Support Center Home:


Welcome, Amanda Marshall!
You last visited our site on 04/24/2008 Friday, April 25, 2008

Self Service

 [Search the Knowledge Base](#)
Use our powerful search engine to find the answers you need. You can search through our Solutions/FAQs, Service Requests, Documentation, Defects or RPEs

 [Documentation & Download Center](#)
Access the complete documentation library and get the latest software patches and releases

My Account

 [My Service Requests](#)
View, update and track the status of my Service Requests

[My Institution's Service Requests](#)
View, update and track the status of my institution's Service Requests

[Submit a Service Request](#)
Get fast, convenient support for SunGard Higher Education products

[My Defects](#)
Track the status of product defects I have reported

[My Institution's Defects](#)
Track the status of product defects others at my institution have reported

[My RPEs](#)
View, update and track the status of Requests for Product Enhancement I have reported

[My Institution's RPEs](#)
View, update and track the status of Requests for Product Enhancement others at my institution have reported

[Submit a RPE](#)
Submit a Request for Product Enhancement

[My Institution's Products](#)
Review the products my institution has licensed, access product literature and download software updates

[My Institution's Contacts](#)
View my institution's contacts information

[My Institution's Entitlements](#)
View my institution's service levels and product entitlement information

[All Defects](#)
View and track published product defects

[All RPEs](#)
View, update and track Requests for Product Enhancement


Announcements

- [Banner 8 Unified Product Release Launch Site](#)
Visit the Banner 8 Unified Product Release Launch Site where you can find more information about this important milestone in the evolution of the Bann...
- [Banner 8 Unified Product Release FAQs](#)
The Banner 8 Unified Product Release will be available in April 2008. The two attached documents are intended to provide answers to frequently asked ...
- [Learn more about the Customer Support Center!](#)
The following items provide an introduction and overview of the Customer Support Center. 1) A recording of the Customer Support Center Overview Jun...
- [Explanation of the Search and Query features, including examples](#)
Document is now version 3.0. See the attached document for an explanation of Search and Query, and for examples of how to use these features. No...
- [How do I subscribe to SunGard Higher Education's Client Listservers?](#)
To subscribe to one or more of SunGard Higher Education's Client Listservers follow the steps below: 1. Go to: <http://lists.sungardhe.com>. 2. Scr...

Solutions/FAQs

[Solutions/FAQs](#)
Query all available solutions/FAQs for your institution's products

Contact Us

 [Request a Customer Support Center Account](#)

Web Sites

- SunGard Customer Support Center

SUNGARD HIGHER EDUCATION My Account | Help | Contact Us | Log In/Out

Customer Support Center [Featured Solutions](#) Search: [Advanced Search](#)

My Defects:

Defects												
Defect #	Status	Reported Date	Summary	Defect Level	Product Line	Product	Module	Category	Process/Object	Reported Version	Targeted Version	
CMS-DFCT105848	Resolved	10/5/2005	Refund by Total with/without Clearing Accounts. When assessment is through Section Fe...see note...	2 - High	Banner	Student	Registration Fees		stkfee1.sql	7.1	7.2.1.1	
CMS-DFCT105101	Resolved	9/6/2005	Refund by Total initial assmt is incorrect when a student qualifies for multiple SFAR...see note...	3 - Medium	Banner	Student	Registration Fees		stkfee1.sql	7.1	7.2.1.2	
CMS-DFCT104348	Resolved	7/22/2005	If student has more than one active hold of the same type, TGPHOLD will fail if it tr...see note...	3 - Medium	Banner	Accounts Receivable			TGPHOLD	7.0		
CMS-DFCT96775	Resolved	8/13/2004	Refund by Total. Section Fees defined on SSADETL with a FLAT Fee Type that have a Cat...see note...	2 - High	Banner	Student	Registration Fees		stkfee1.sql	6.2	7.3.0.2	
CMS-DFCT85574	Resolved	3/4/2003	When running the TSRRFND process, the current, active address and sequence number is ...see note...	2 - High	Banner	Finance			FABCHKP/FARDIRD	5.2		
CMS-DFCT85574-7.0	Resolved	3/4/2003	When running the TSRRFND process, the current, active address and sequence number is ...see note...	2 - High	Banner	Finance			FABCHKP/FARDIRD	5.2		
CMS-DFCT78762	Resolved	6/27/2002	TSATPRL does not allow any fields to be updated in the Bill Parameters block. Also, y...see note...	3 - Medium	Banner	Accounts Receivable			TSATPRL	5.3		
CMS-DFCT77353	Resolved	4/24/2002	Performance Issue on SHATATC.	3 - Medium	Banner	Student	Transfer Articulation		SHATATC	5.2		

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Web Sites

- **Banner Production Support**

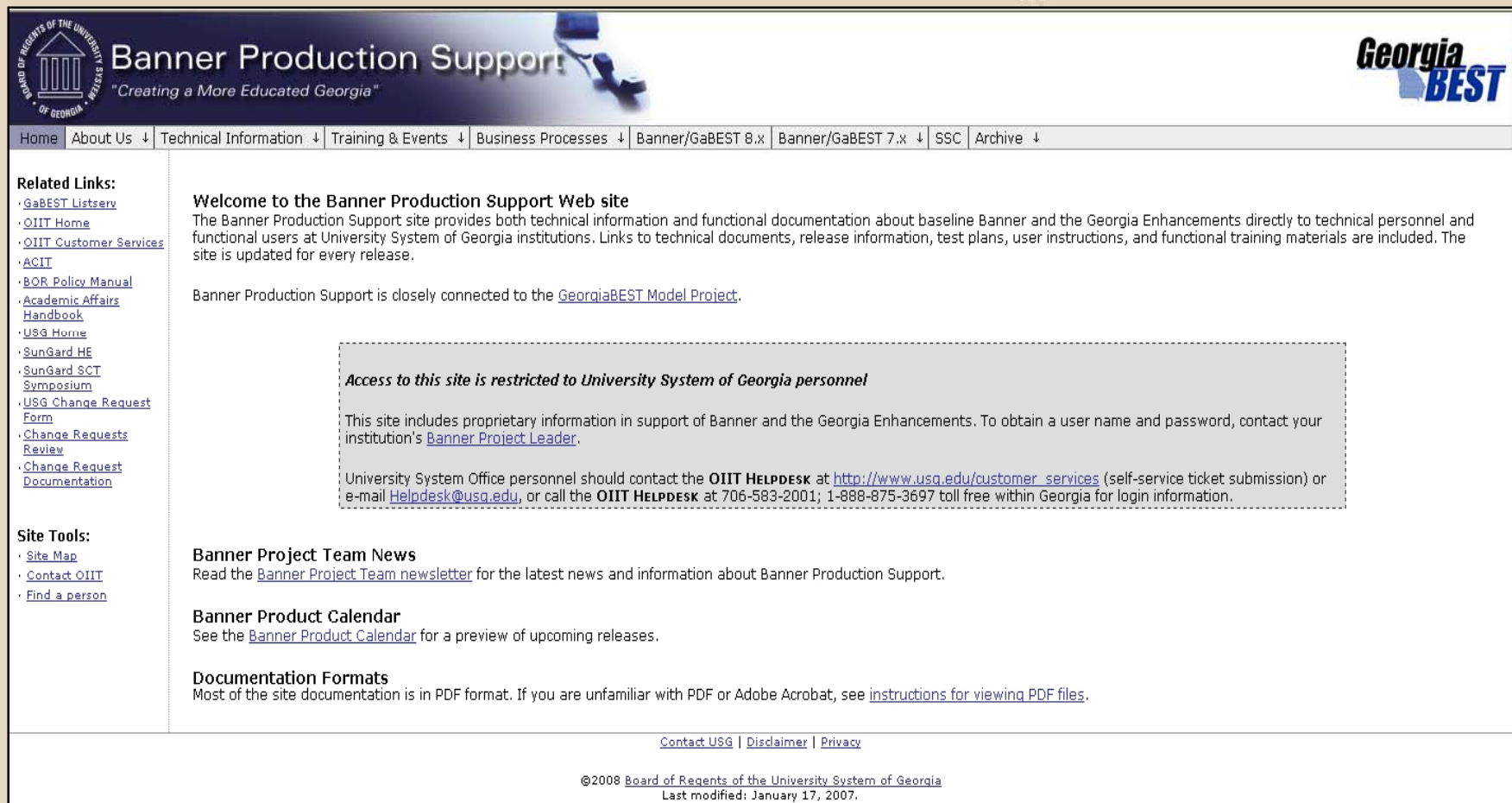
- www.usg.edu/banner


- Includes the following:


- Release Information
 - User Documentation
 - Workshop materials
 - Test Plans
 - Workbooks
 - Business Practices
 - Product Calendar
 - Events Calendar

Web Sites

● Banner Production Support



 **Banner Production Support**
"Creating a More Educated Georgia"



Home | About Us ↓ | Technical Information ↓ | Training & Events ↓ | Business Processes ↓ | Banner/GaBEST 8.x | Banner/GaBEST 7.x ↓ | SSC | Archive ↓

Related Links:

- [GaBEST Listserv](#)
- [OIIIT Home](#)
- [OIIIT Customer Services](#)
- [ACIT](#)
- [BOR Policy Manual](#)
- [Academic Affairs Handbook](#)
- [USG Home](#)
- [SunGard HE](#)
- [SunGard SCT Symposium](#)
- [USG Change Request Form](#)
- [Change Requests Review](#)
- [Change Request Documentation](#)

Site Tools:

- [Site Map](#)
- [Contact OIIIT](#)
- [Find a person](#)

Welcome to the Banner Production Support Web site
The Banner Production Support site provides both technical information and functional documentation about baseline Banner and the Georgia Enhancements directly to technical personnel and functional users at University System of Georgia institutions. Links to technical documents, release information, test plans, user instructions, and functional training materials are included. The site is updated for every release.

Banner Production Support is closely connected to the [GeorgiaBEST Model Project](#).

Access to this site is restricted to University System of Georgia personnel

This site includes proprietary information in support of Banner and the Georgia Enhancements. To obtain a user name and password, contact your institution's [Banner Project Leader](#).

University System Office personnel should contact the **OIIIT HELPDESK** at http://www.usg.edu/customer_services (self-service ticket submission) or e-mail Helpdesk@usg.edu, or call the **OIIIT HELPDESK** at 706-583-2001; 1-888-875-3697 toll free within Georgia for login information.

Banner Project Team News
Read the [Banner Project Team newsletter](#) for the latest news and information about Banner Production Support.

Banner Product Calendar
See the [Banner Product Calendar](#) for a preview of upcoming releases.


Documentation Formats
Most of the site documentation is in PDF format. If you are unfamiliar with PDF or Adobe Acrobat, see [instructions for viewing PDF files](#).

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Last modified: January 17, 2007.



Web Sites

- Banner Production Support



Banner Production Support

"Creating a More Educated Georgia"

Home
About Us ↓
Technical Information ↓
Training & Events ↓
Business Processes ↓
Banner/GaBEST 8.x
Banner/GaBEST 7.x ↓
SSC
Archive ↓

Related Links:

- [GaBEST Listserv](#)
- [OIIIT Home](#)
- [OIIIT Customer Services](#)
- [ACIT](#)
- [BOR Policy Manual](#)
- [Academic Affairs Handbook](#)
- [USG Home](#)
- [SunGard HE](#)
- [SunGard SCT Symposium](#)
- [USG Change Request Form](#)
- [Change Requests Review](#)
- [Change Request Documentation](#)

Site Tools:

- [Site Map](#)
- [Contact OIIIT](#)
- [Find a person](#)

Functional User Documentation for the Georgia Enhancements 7.x

Current User Documentation

Previous Versions of User Documentation

Accounts Receivable

User Documents and Version Number	Other Release Documents	Forms/Processes Modified
AR Acceptance Flag Update (501kb) Georgia Enhancements 7.11.1	Test Plan - 313kb Technical Release notes - 159kb	AR Acceptance Flag Update Workbook
AR Detail Code Maintenance (2743 kb) Georgia Enhancements 7.10 (12/14/07)	Test Plan - 208 kb Technical Release Notes - 50 kb	ztgkpsft.sql package for the following forms: ZSADETC ZSICHFD ZSAMISC ZSRMASS
AR Direct Debit (1.4 mb) Georgia Enhancements 7.6 (12/15/06)	Test Plan - 498 kb Release Notes - 711 kb	ZSADETC
AR Direct Deposit Subscription (1.8 mb) Georgia Enhancements 7.6 (12/15/06)	Test Plan - 498 kb Release Notes - 711 kb	NA
AR End of Day Process (1.0 mb) Georgia Enhancements 7.6 (12/15/06)	Test Plan - 498 kb Release Notes - 711 kb	ZSRCBIL
AR Fee Assessment (934kb) (2/29/08)	N/A	Revisions to documentation (no new functionality delivered)
AR Receipt Writing (1685 kb) Georgia Enhancements 7.10 (12/14/07)	Test Plan - 208 kb Technical Release Notes - 50 kb	ZGRARLD
AR Refund Status (631 kb) Georgia Enhancements 7.6 (12/15/06)	Test Plan - 498 kb Release Notes - 711 kb	NA

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- [Change Request Documentation](#)

GCollege411 Business Practices

The following business practices explain standard functions or procedures related to GCollege411.

Title	Date Last Revised
Axiom User Guide V3	April 2007
GCollege411 Application Download Using Axiom	January 2008
GCollege411 Application Download Using Baseline Banner	July 2006
GCollege411 Application Payment using Touchnet Process Flow	February 2006
GCollege411 Application Download Process Flow	February 2006
Incomplete Application Setup Instructions	July 2006
USG Incomplete Application Template	July 2006

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Last modified: January 30, 2008.

List Servs

- **Background**
 - Forum for user community to discuss ideas, share information, ask questions related to their specific office function.

List Servs

- SunGard HE List Servs

- Banner Accounts Receivable (BAR@sungardhe.com)
- Banner Student (BSTUDENT@sungardhe.com)
- Banner Financial Aid (BFINAID@sungardhe.com)
- Banner Training (BTRAIN@sungardhe.com)
- Banner General (BGENERAL@sungardhe.com)
- Banner Oracle (BORACLE@sungardhe.com)
- Banner Announcement (BANNOUNCE@sungardhe.com)
- Banner Information (BINFO@sungardhe.com)
- Banner Admissions and Recruiting (BADM@sungardhe.com)
- Banner CAPP (BCAPP@sungardhe.com)
- Banner Location Management (BLOC@sungardhe.com)
- There are numerous other SunGard HE List Servs

List Servs

- SunGard HE List Servs

- Go to the following URL:

- <http://lists.sungardhe.com/cgi-bin/wa?INDEX>

- Select the list you wish to subscribe to.

- Click on the 'Join or Leave. . .'

- Enter your name and e-mail address.

- Make required selections for format.

- Click the Join button.

List Servs

- USG Listservs

- Banner DBAs (BANNERDBA-L@listserv.uga.edu)
- Banner Project Functional Leaders (BPRJFUNCT-L@listserv.uga.edu)
- Banner Project Technical Leaders (BPRJTECH-L@listserv.uga.edu)
- CAPP (CAPP@listserv.uga.edu)
- Financial Aid Directors (FINAID-L@listserv.uga.edu)
- GaBEST (GABEST-L@listserv.uga.edu)
- Oracle Information (ORA-INFO@listserv.uga.edu)
- RACRA (RACRA@listserv.uga.edu)
- RACAR (RACAR@listserv.uga.edu)
- RACSFA (RACSFA@listserv.uga.edu)
- Student Health Insurance Program (SHIP) (USGSHIP@listserv.uga.edu)
- TouchNet (USGTOUCHNET-L@listserv.uga.edu)
- USG XML Transcript Exchange (USGXML-L@listserv.uga.edu)
- GeorgiaONmyLINE (USG-FRANCHISE-L@listserv.uga.edu)
- Axiom (USGAXIOM-L@listserv.uga.edu)
- DegreeWorks (USGDEGREEWORK-L@listserv.uga.edu)

List Servs

- **USG Listservs**

- To subscribe to a listserv, send an e-mail to the following address: `listserv@listserv.uga.edu`
- You do not need to include a subject line in the email. In the text area of the email include only the following:
`subscribe <listserv name> <full name>`
- For example: `subscribe GABEST-L John Doe`

OR

- Go to the following URL: <http://listserv.uga.edu/>
- Select "Browse, Subscribe, Post, Search ..."
- In the List Name box, type the listserv name (i.e. GABEST-L) and follow the resulting instructions.

Regents Advisory Committees

- Committees meet regularly to discuss items of interest to all USG institutions. Each group makes recommendations regarding policy and functionality needed.
- Each group operates based on a set of by-laws with a Chair, Vice Chair and Secretary.

Regents Advisory Committees

- Regents Advisory Committees include but are not limited to the following
 - RACSFA
 - Financial Aid
 - RACAR
 - Accounts Receivable
 - RACRA
 - Admissions and Registrars
 - RACSL
 - Student Life
 - RACDE
 - Distance Education

Wimba Sessions

- OIIT utilizes Horizon Live Wimba to offer Monthly Release Review sessions to provide users with information regarding Georgia Enhancement releases. New functionality, Enhancements, and Defect Corrections to the Georgia Enhancement software are featured during these sessions.

Wimba Sessions

- Additionally, sessions are offered to provide training opportunities and to facilitate meetings when budget constraints prevent travel for live classroom offerings.
- All sessions are announced one to two weeks prior to the session date.
- No registration or registration fee required.

Wimba Sessions

OIIT Banner Monthly Release Review

➤ Enhancements

- Distance Education Flat Fee Form (ZSAFFEE)
- Campus Data Extract (ZORELCA)
- Time Status Calculation Update (ZFRTMST)
- Clearinghouse Extract Report (ZFRNSLC)

➤ Defect corrections

- CPE Requirement Update (ZORCPED)
- CVUE LDIS Extract (ZSRPCEX)
- College Work Study Interface (ZRPWST1 and ZRPWST2)
- Financial Aid Reconciliation (ZHRFARR)
- Accumulation/Eligibility Process (ZORHGPA)

Navigation Exit - Lobby - Help


You have entered 'Banner'.
Your media format is WimbaMedia.

You have entered the lobby.

You have entered 'Banner - 02/29/2008
15:02'.
Your media format is QuickTime Audio Archive.

To: Main Room

People (1) ✓ X Hand Smile
AmandaM



⏸ ✓ ✕ Hand Smile 📶 ⚙

Wimba Sessions

Student

Enhancements

- Distance Education Flat Fee Form (ZSAFFEE)
- Campus Data Extract (ZORELCA)
- Time Status Calculation Update (ZFRTMST)
- Clearinghouse Extract Report (ZFRNSLC)

Defect Corrections

- CPE Requirement Update (ZORCPED)
- CVUE LDIS Extract (ZSRPCEX)

Navigation Exit - Lobby - Help

JohnB says "Any difference in sound?"
Banner says "Did you say something?"
CGCCChastity says "y"
GASOU_ANN_and_Wallace says "yes"

People (1)
AmandaM



To: Main Room

Control icons: pause, checkmark, close, hand, smile, waveform, settings

Wimba Sessions

ZORELCA

- The parameters have been reworded for understandability with YES or NO answers.

The screenshot shows a software window titled "ZORELCA" with a "Parameter Set" dropdown. Below this is a "Printer Control" section with fields for "Printer", "Special Print", "Lines", and "Jobbed Time". The main section is "Parameter Values", which contains a table with columns for "Number", "Parameter", and "Value".

Number	Parameter	Value
01	None	
02	Admission Required	YES
03	Admission by Interview	YES
04	Internet Registration Allowed	YES

Below the table is a "Submissions" section with a "Save Parameter Set as" button and fields for "Name" and "Description".

Navigation

Exit - Lobby - Help

JohnB says "Any difference in sound?"
Banner says "Did you say something?"
CGCCChastity says "y"
GASOU_ANN_and_Wallace says "yes"

People (1)

AmandaM



To: Main Room



Proprietary Information

- All user documentation, release notes, release announcements, test plans, workbooks, and training materials such as CBT's may be downloaded by an institution for internal use only. This documentation must be stored in a secure environment that is password protected to avoid public access to information deemed private and confidential by the vendor(s).



Overview of Banner Baseline

Overview

- Naming Conventions
- Validation to Rules to Forms/Processes
- Impact of Changes on Other Offices
- Navigation

Naming Conventions



Naming Conventions

- **Background**
 - Banner has a standard naming convention for forms and processes. Each letter of the seven character acronym has a specific meaning based on the module, type, and descriptive name.

S P A P E R S



Primary System owning the
form: Student

Naming Conventions

- What's in a name?
 - Position 1: Identifies the primary system owning the form, report, job, or table.

Naming Conventions

A Advancement	K Work Management	T Accounts Receivable
B Property Tax	L Occupational Tax/License	U Utilities
C Courts	N Position Control	V Voice Response
D Cash Drawer	O Customer Contact	X Records Indexing
E XtenderSolutions	P HR/Payroll/Personnel	W Reserved for client
F Finance	Q Electronic Work Queue	Y applications that co-exist
G General	R Financial Aid	Z with Banner
I Information Access	S Student	

Used for institutional
enhancements NOT
supported by OIIT

Used ONLY for OIIT supported
Georgia Enhancements

SPAPERS



Primary Module owning the
form: Person

Naming Conventions

- What's in a name?
 - Position 2: Identifies the module owning the form, report, job, or table.

General (G)	Financial Aid (R)	Student (S)
E Event Management		A Admissions
J Job Submission	B Budgeting	C Catalog
L Letter Generation	C Record Creation	E Support Services
O Overall	E Electronic Data Exchange	F Registration/Fee Assessment
P Purge	F Funds Management	G General Student
S Security	H History and Transcripts	H Grades/Academic History
T Validation form/table	J Student Employment	I Faculty Load
U Utility	L Logging	K Reserved-SCT Intntl. UK
V Reserved-Can. Solution Ctr.	N Need Analysis	L Location Management
X Cross product	O Common Functions	M CAPP
Accounts Receivable (T)	P Packaging & Disbursements	O Overall
F Finance Accounts Receivable	R Requirements Tracking	P Person
G General Accounts Receivable	S Student System Shared Data	R Recruiting
O Overall	T Validation form/table	S Schedule
R Research Accounting	U Utility	T Validation form/table
S Student Accounts Receivable	V Reserved-Can. Solution Ctr.	U Utility
T Validation form/table	Information Access/Kiosk (I)	V Reserved-Can. Solution Ctr.
U Utility	R Financial Aid	XtenderSolutions (E)
V Reserved-Can. Solution Ctr.	S Student	T Validation form/table
		X XtenderSolutions
All Products		
W Reserved for client forms or modules used within a Banner application		
Y (character in position 1 does not equal W, Y, or Z)		
Z		

SPAPERS



Form Type: Application

Naming Conventions

- What's in a name?
 - Position 3: Identifies the type of form, report, job, or table.

Accounts Receivable (I)	Financial Aid (R)	Student
A Application form	A Application form	A Application form
I Inquiry form	B Base table	B Base table
P Process	I Inquiry form	I Inquiry form
Q Query form	P Process/report	P Process
R Report	R Rule table	Q Query form
V Validation form/table	Repeating rules table	R Rule table
General (G)	Report	Repeating table
A Application form	T Temporary table	Report/process
B Base table	V Validation form/table	V Validation form/table
Batch COBOL process	View	View
I Inquiry form	Information Access/Kiosk (I)	
O Online COBOL process	R Report	
Q Query form	XtenderSolutions (E)	
R Rule table/form	A Application form	
Repeating table	V Validation form/table	
Report/process		
T General maintenance		
Temporary table		
V Validation form/table		
View		

SPAPERS



Uniquely identifies the form:
Person Information

Naming Conventions

- What's in a name?
 - Position 4,5, 6, and 7: Uniquely identifies the form, report, job, or table.

BREAK



Validation to Rules to Forms/Processes



Validation to Rules to Forms/Processes

- **Background**

- Validation, rules, maintenance, and control forms all work in Banner to get processes and jobs completed successfully
- Many processes and jobs cannot run correctly without the proper forms set up behind them

Validation to Rules to Forms/Processes

- **Form Types**

- **Set up forms**

- Should be completed before using day to day forms
- Normally restricted to a few users to maintain

- **Day to day forms**

- Used to access information produced from processing data or from data entered on set up forms

Validation to Rules to Forms/ Processes

Form types

Different form types are associated with the form categories.

Categories	Users	Types
Setup	Administrator and/or Staff	<ul style="list-style-type: none">• Rule• Validation• Control
Day-to-Day	Staff	<ul style="list-style-type: none">• Inquiry• Application• Query• Maintenance

Validation to Rules to Forms/ Processes

- Rules form
 - Use to define calculations and parameters that impact other forms, reports, and jobs
 - Must be built before using Banner
 - Examples
 - Fund Management (RFRMGMT)
 - Curriculum Activity Status Rules (SORCACT)
 - General Message (GURMESG)

Validation to Rules to Forms/ Processes

- Validation forms

- Use to define values that are entered on specific fields on application, validation, or rule forms
- Defines a field's List of Values (LOV)
- The LOV field on a form indicates that the value for the field must come from a validation form
- Examples
 - Term Code Validation (STVTERM)
 - Budget Group Validation (RTVBGRP)
 - Crosswalk Validation (GTVSDAX)

Validation to Rules to Forms/ Processes

- Control forms
 - Use to define system level processing rules for application and validation forms
 - Additional security requirements
 - Examples
 - Installation Controls (GUAINST)
 - Institution Financial Aid Options (ROAINST)
 - Faculty/Advisor Information (SIAINST)

Validation to Rules to Forms/ Processes

- **Inquiry forms**
 - Use to look up existing information
 - Access from main menu, other forms, or Direct Access
 - Examples
 - Account Detail Review Inquiry (RSIAREV)
 - Application of Payment Review (TSIAPPL)
 - Student Withdrawal Inquiry (SFIWDRL)

Validation to Rules to Forms/ Processes

- **Application forms**
 - Use to enter, update, and query information
 - Most common type of form
 - Examples
 - XXXX – XXXX Need Analysis (RNANAxX)
 - Admissions Application (SAAADMS)
 - Billing Mass Data Entry (TSAMASS)

Validation to Rules to Forms/ Processes

- Query forms
 - Use to look up existing information
 - Examples
 - Enrollment Status Query (SFQESTS)
 - Contract Authorization Query (TSQCONT)
 - Letter Display (GUQLETR)

Validation to Rules to Forms/ Processes

- **Maintenance forms**
 - Use to reflect changes that will effect information in Banner
 - Job Submission (GJAPCTL)
 - Financial Aid Record Maintenance (ROARMAN)
 - Term Course Maintenance (SHAINST)

Validation to Rules to Forms/ Processes

- Relationships between forms are commonly known as the parent-child relationship
- If information on a parent form has been assigned to a child form, the parent information cannot be deleted without deleting the child first

Relationship	Forms
Parent	Rule and Validation
Child	Application and Query

Impact of Changes on Other Offices



Impact of Changes on Other Offices

- **Background**

- Everything that is done in Banner potentially impacts all other offices at an institution.

- Admitting and registering the student for courses will impact both the financial aid and business office at your institution.

Impact of Changes on Other Offices

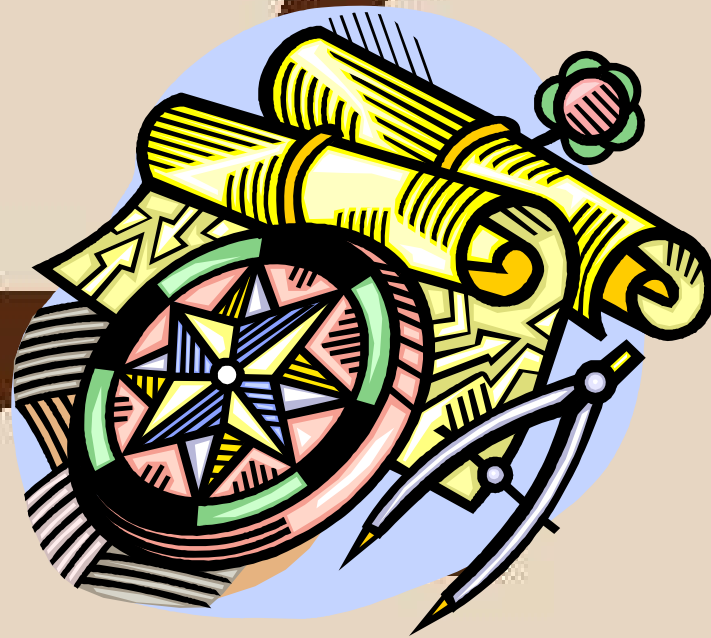
- **Avoiding Pitfalls**

- Consult other offices regarding major changes to business process.
- Data entered by one office may be needed by another office to complete processing

- **Examples**

- Academic data may impact financial aid eligibility
- Student accounts information may need coordination with financial aid to process payment and refund information
- The GTP attribute may be assigned by the Registrar or Admissions and is also needed for HOPE invoicing by the Financial Aid Office

Navigation

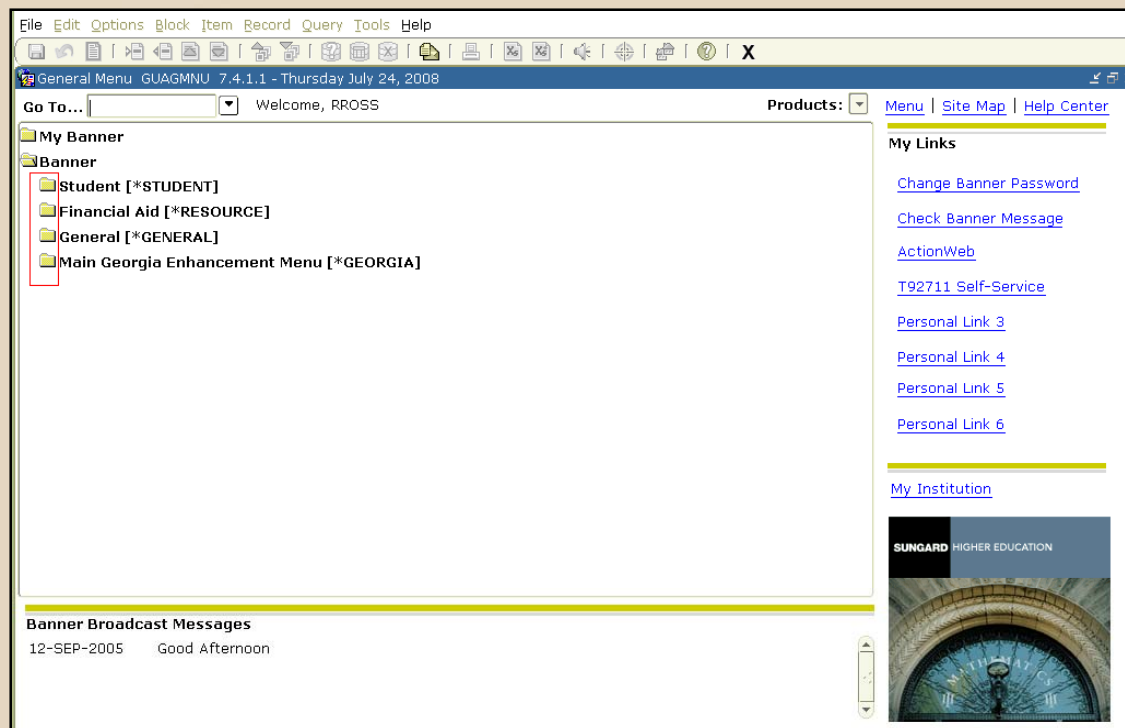


Navigation

- **Background**
 - There are multiple ways to access Banner forms
 - Menu Navigation
 - Direct Access
 - Site Map
 - QuickFlows
 - Object Search
 - My Banner
 - Options Menu

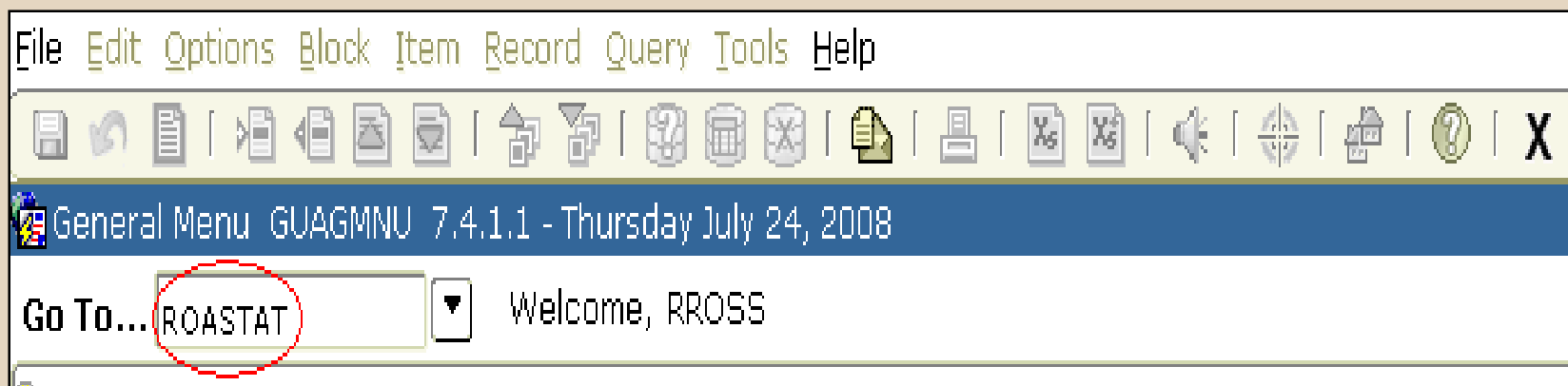
Menu Navigation

- The Main Menu (GUAGMNU) is a menu tree of Banner forms, menus, etc. in a logical order
- Access menus and forms by clicking on folders



Direct Access

- Enter the name of the form (ROASTAT, SPAPERS, SOATERM, etc.) in the Go To field of the Main Menu



Site Map

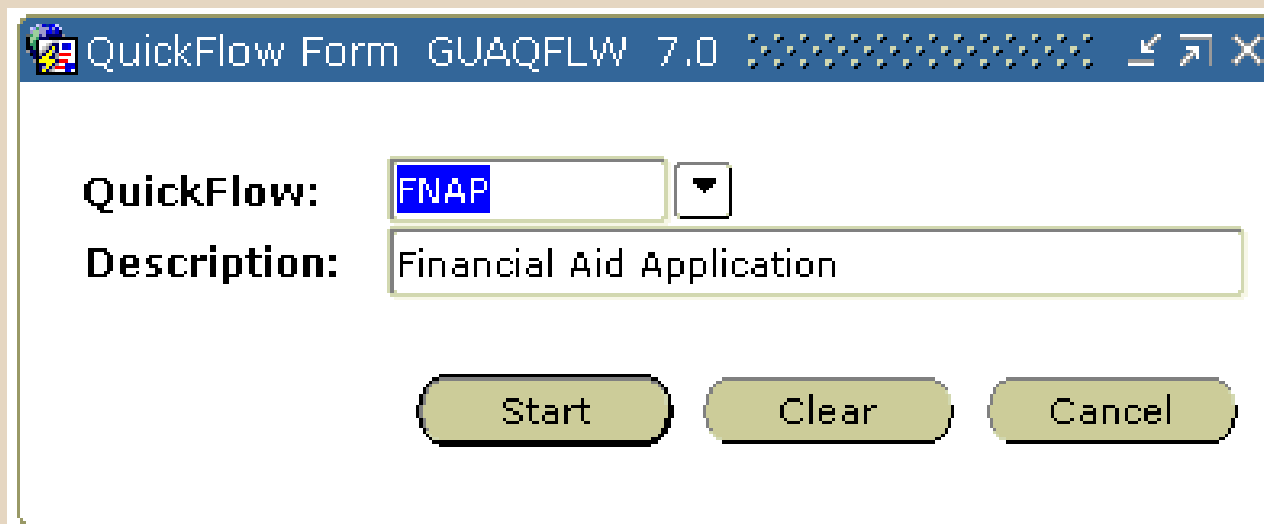
- Provides a general view of the Banner menus

The screenshot shows a web browser window with the title "General Menu GUAGMNU 7.4.1.1 - Thursday July 24, 2008". The page content is organized into several sections:

- Go To...:** A search box and a dropdown menu showing "Welcome, RROSS".
- Products:** A dropdown menu.
- Menu | Site Map | Help Center:** Navigation links, with "Site Map" highlighted in a red box.
- My Banner:** A list of menu items including "Empty; Select to build.", "Student", "Financial Aid", and "General".
- Business Processes:** A list of menu items including "Manage the Enterprise", "Matriculate to Educate", "Forecast to Enroll", and "Plan to Fund".
- My Links:** A list of links including "Change Banner Password", "Check Banner Message", "ActionWeb", "T92711 Self-Service", "Personal Link 3", "Personal Link 4", "Personal Link 5", and "Personal Link 6".
- My Institution:** A link to the institution's website.
- SUNGARD HIGHER EDUCATION:** A logo at the bottom right of the page.

QuickFlows

- Enables the user to access a sequence of forms that may be built by specific job tasks



QuickFlow Form GUAQFLW 7.0

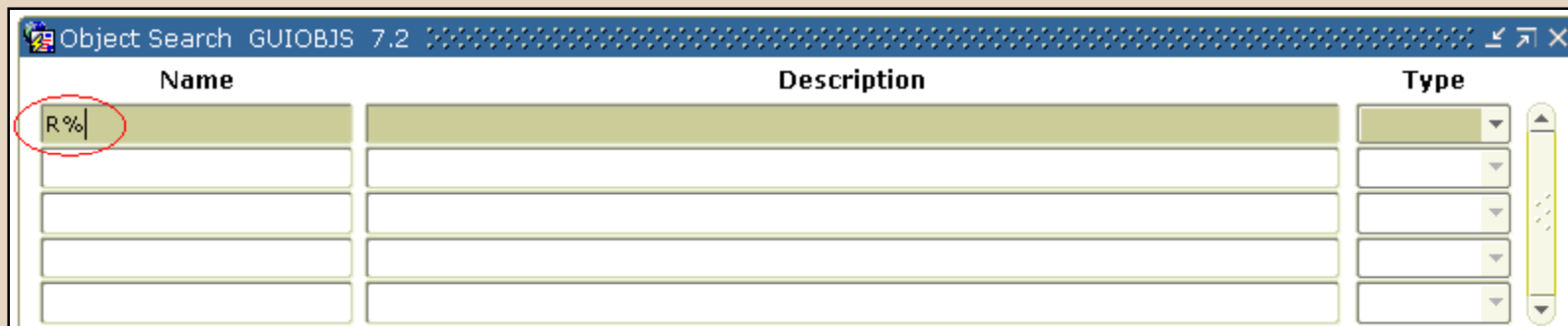
QuickFlow: FNAP ▼

Description: Financial Aid Application

Start Clear Cancel

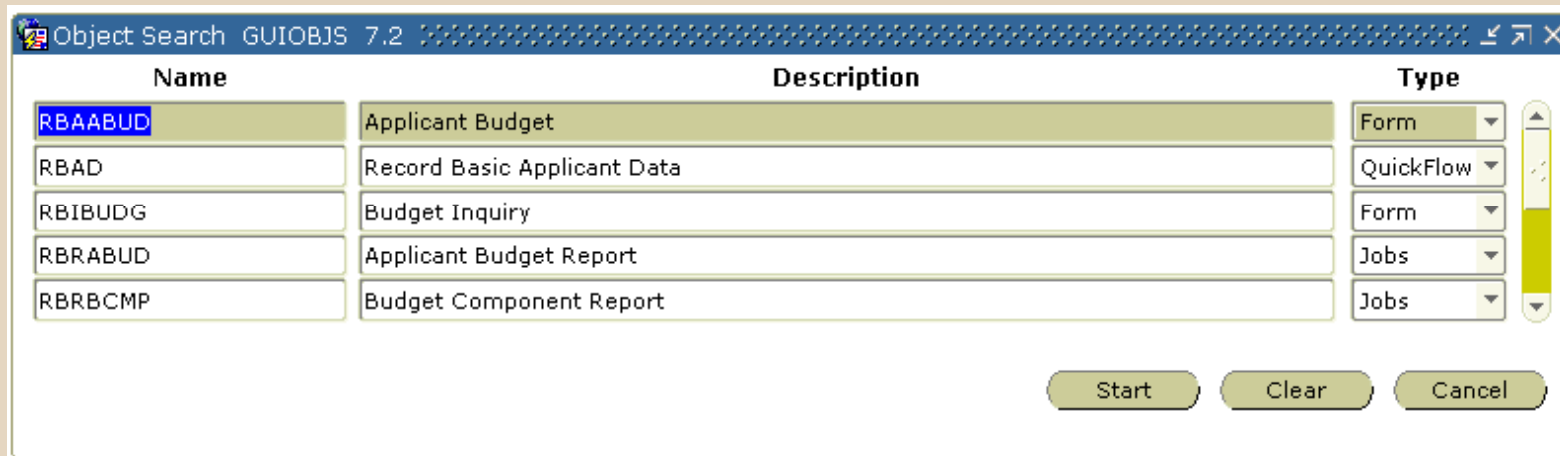
Object Search

- Enables the user to search for a form without knowing the full name
- Example: all Financial Aid forms begin with the letter 'R'
- Access GUIOBJJS
- Use this letter and the wildcard '%' to search for forms that begin with 'R'



Object Search

- Choose Query > Execute to begin search
- Then click on name to access object



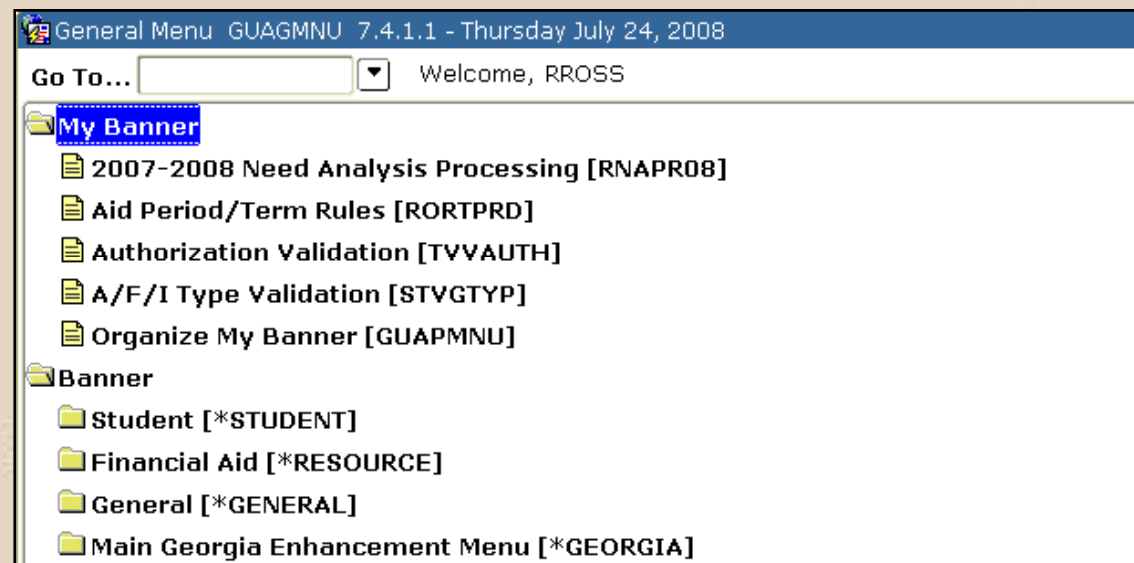
The screenshot shows a window titled "Object Search GUIOBS 7.2". It contains a table with three columns: "Name", "Description", and "Type". The first row is highlighted in green. Below the table are three buttons: "Start", "Clear", and "Cancel".

Name	Description	Type
RBAABUD	Applicant Budget	Form
RBAD	Record Basic Applicant Data	QuickFlow
RBIBUDG	Budget Inquiry	Form
RBRABUD	Applicant Budget Report	Jobs
RBRBCMP	Budget Component Report	Jobs

Start Clear Cancel

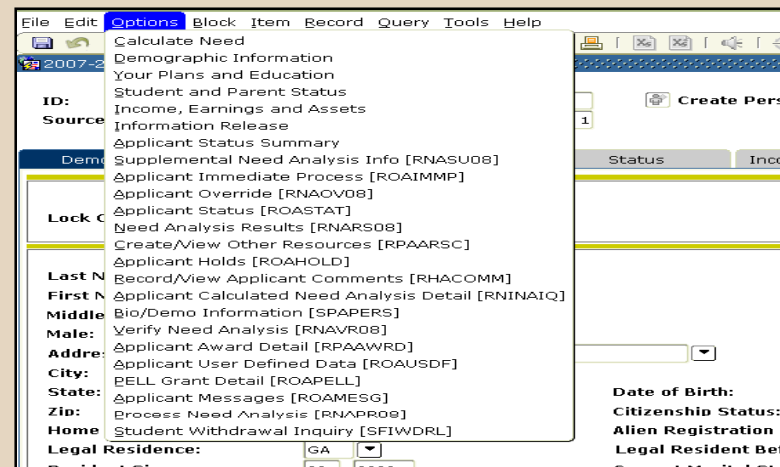
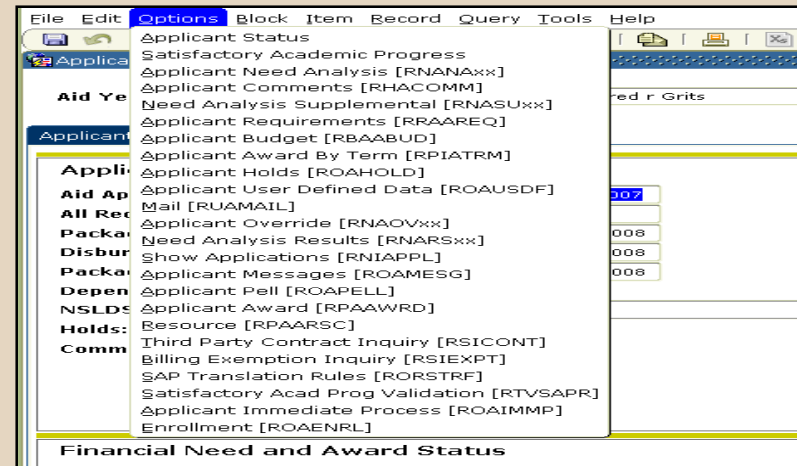
My Banner

- Personal menu connected to an individual's Banner ID
- Create menu items in My Banner Maintenance (GUAPMNU)



Options Menu

- Options menu from each form connects to other forms
 - First form from ROASTAT
 - Second form from RNANAXX



Form Navigation

Oracle Developer Forms Runtime - Web: Open > RPIFEDR

File Edit Options Block Item Record Query Tools Help

Federal Rules Inquiry RPIFEDR 7.8

Aid Year: 0708 2007-2008 Aid Year

Fields

Key Block

Menu Bar

Iconic Tool Bar

Federal Fund ID	Class Code		Minimum Load	Preparatory or Teacher Certification	HPPA Ind	Additional Stafford	Maximum Annual	Maximum Cumulative
ACG	1	1st (never att.)	1	Full-time	N	No	750.00	750.00
ACG	2	1st (prev. att.)	1	Full-time	N	No	750.00	750.00
ACG	3	2nd Year	1	Full-time	N	No	1,300.00	2,050.00
PELL	1	1st (never att.)	4	Less than 1/2	N	No	4,310.00	999,999.00
PELL	2	1st (prev. att.)	4	Less than 1/2	N	No	4,310.00	999,999.00
PELL	3	2nd Year	4	Less than 1/2	N	No	4,310.00	999,999.00
PELL	4	3rd Year	4	Less than 1/2	N	No	4,310.00	999,999.00
PELL	5	4th Year	4	Less than 1/2	N	No	4,310.00	999,999.00
PELL	6	5th/more ungrad.	4	Less than 1/2	N	No	4,310.00	999,999.00
PERK	0	3rd Yr+/grad	4	Less than 1/2	N	No	6,000.00	40,000.00
PERK	1	1st (never att.)	4	Less than 1/2	N	No	4,000.00	8,000.00
PERK	2	1st (prev. att.)	4	Less than 1/2	N	No	4,000.00	8,000.00
PERK	3	2nd Year	4	Less than 1/2	N	No	4,000.00	8,000.00
PERK	4	3rd Year	4	Less than 1/2	N	No	4,000.00	20,000.00
PERK	5	4th Year	4	Less than 1/2	N	No	4,000.00	20,000.00
PERK	6	5th/more ungrad.	4	Less than 1/2	N	No	4,000.00	20,000.00
PERK	7	1st Yr/grad/prof	4	Less than 1/2	N	No	6,000.00	40,000.00
PERK	8	2nd Yr/grad/prof	4	Less than 1/2	N	No	6,000.00	40,000.00

Hint Text

Federal Fund ID

Record: 1/?

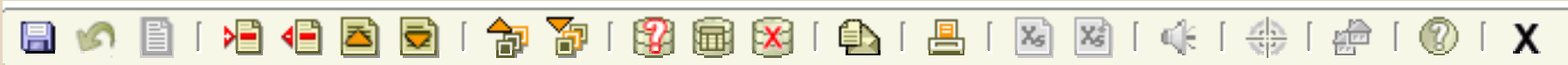
Form Navigation

- All Banner forms contain a menu bar
- The menu bar is simply another method of navigation in Banner
- If a selection on the menu is dimmed, this means it is disabled

File Edit Options Block Item Record Query Tools Help

Form Navigation

- Banner also contains toolbars that perform functions (top picture)



- The bottom picture contains the Key Block in red
- The data entered in the Key Block makes the record unique

A screenshot of the Applicant Status form in ROASTAT 7.8. The form has a title bar that reads "Applicant Status ROASTAT 7.8". Below the title bar, there is a red-bordered box (the Key Block) containing the following fields: "Aid Year:" with a dropdown menu showing "0708", "ID:" with a dropdown menu showing "852852852", and a text field containing "Buttered r Grits". Below the Key Block, there are two tabs: "Applicant Status" (selected) and "Eligibility Status". The main content area is titled "Applicant Processing Status" and contains the following fields:

Aid Application Received:	<input type="text"/>	Expected Enrollment Status:
All Requirements Satisfied:	<input type="text"/>	Tracking Group:
Package Requirements Complete:	<input type="text"/>	Budget Group:
Disbursement Requirements Complete:	<input type="text"/>	Packaging Group:

How to Query Data

- Use the query function to access information already stored in the database
- Go to the form you want to query
- Click on Enter Query to access query mode
- Enter query criteria
- Use Wildcards (% and _) to search when you only have part of the data you need



Wildcards

- Use Wildcards to search for information when you are unsure of the entire name or code
- % represents any number of characters and _ represents a single occurrence of a character

To get these results

All entries that contain *ma*

All entries that begin with *ma*

All entries that have *ma* as the final two characters

All entries that have *m* as the second character

Enter these criteria

%ma%

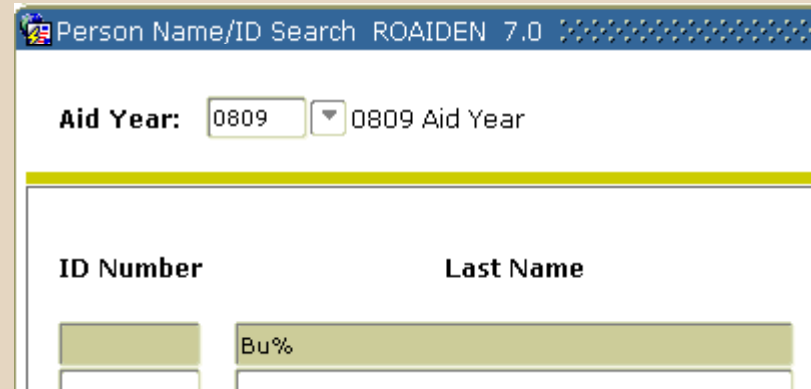
ma%

%ma

_m%

Query using Wildcards

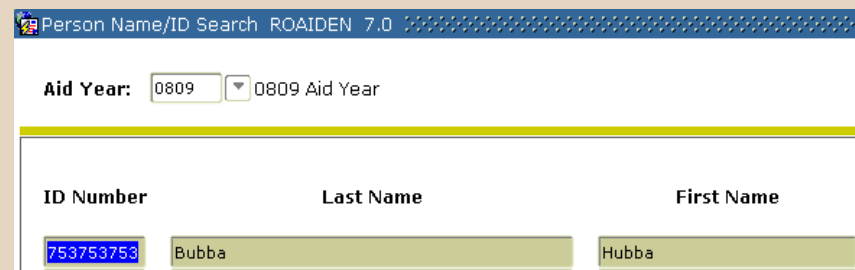
- Search for a last name that begins with 'Bu'
- Execute query and retrieve last name 'Bubba'



Person Name/ID Search ROAIDEN 7.0

Aid Year: 0809 0809 Aid Year

ID Number	Last Name
	Bu%



Person Name/ID Search ROAIDEN 7.0

Aid Year: 0809 0809 Aid Year

ID Number	Last Name	First Name
753753753	Bubba	Hubba

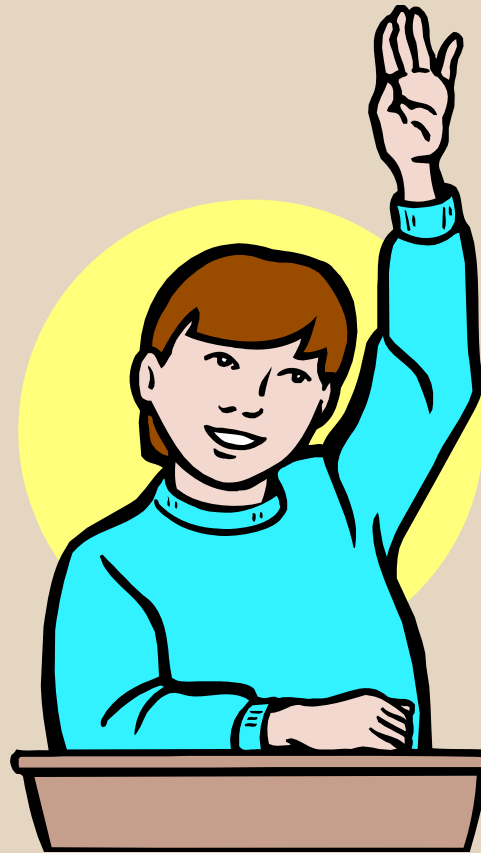
Query using Wildcards

- Search for a fund code where you know that 'HOP' is included in the name and there is only one leading character before 'HOP'
- The _ represents a single occurrence of the character and % represents any number of characters

Fund Code	Description	Accounts Receivable De
<input type="text" value="_HOP%"/>	<input type="text"/>	<input type="text"/>

Fund Code	Description	Accounts Receivable D
GHOPAB	HOPE Book Award (Alt)	HOAB
GHOPAL	HOPE Scholarship (Alt)	HOAL
GHOPAR	Hope Alternate Refund	HARF
GHOPBK	HOPE Book Award	HOBO
GHOPE	HOPE Scholarship	HOPE
GHOPRF	HOPE Scholarship	HPRF
GHOPRO	Hope Promise Award	HOPR
GHOPS1	HOPE Certificate Alternative	HOTU
GHOPS2	HOPE Certificate Alternative	HOFE
GHOPS3	HOPE Certificate Alternative	HOBK

Questions



A stylized map of the state of Georgia is shown in a light beige color. A thick, dark brown path winds through the state, starting from the west coast and moving towards the south. There are several green areas representing water bodies or parks, including a large one in the northwest, a smaller one in the northeast, and a large one in the south. The text is centered over the map.

Georgia Enhancements and Modifications to Baseline Overview

Overview

- **Accounts Receivable**
- **Financial Aid**
- **Student**
- **Self-Service**
- **Modifications to Banner Baseline**

Accounts Receivable



Accounts Receivable

- All Accounts Receivable has been moved to Banner by directive of the University System Office based on audit recommendations.
- Highest concentration of GaMods.
- Items include:
 - Account code validation – live database to database link with the institution's PeopleSoft Financial database
 - Student Attribute assignment for Student Health Insurance (SHIP) and the Guaranteed Tuition Plan (GTP)

Accounts Receivable

- Items include (con't):
 - Student Health Insurance processing
 - File creation
 - Load of waivers from vendor
 - Direct Deposit
 - Self-Service subscription and maintenance
 - Email notification system
 - Refund Status reporting
 - Loading TBRACCD transactions from a third party

Accounts Receivable

- **Items include (con't):**
 - **Non-Student Receivable processing**
 - **Receipting**
 - **Loading of charges from PeopleSoft HRMS**
 - **Preparing statements and billing**
 - **Account Aging**
 - **Interfacing Receivables and Payment information to the PeopleSoft Financial System**

Accounts Receivable

- Providing the ability to reset the Financial feed when necessary
- Purging the temporary storage of fed, reconciled and reported financial data

Financial Aid



Financial Aid

- GaMods mainly related to HOPE processing and tracking
- Items include:
 - Provides mechanism for HOPE processing
 - Determining eligibility
 - Awarding of funds
 - Authorization of funding
 - Tracking of academic progress
 - GSFC reporting (extraction file and loading file)

Financial Aid

- **Items include (con't):**
 - View students with learning support hours
 - Reconciliation with GSFC
 - **Self-Service Authorization of Title IV & HOPE funds**
 - **Tracking of Title IV recipient's Satisfactory Academic Progress**
 - **College Work Study tracking**
 - Load file from PeopleSoft HRMS
 - Tracks monies paid to CWS recipients
 - **Georgia Student Finance Commission Application load**

Student



Student

- **Maintenance and reporting of Academic Requirements**
 - College Preparatory Curriculum (CPC)
 - Regents' Testing Program
 - State of Georgia Legislative Requirements
 - Learning Support Requirements

Student

- **Maintenance and reporting of Non-Academic Requirements**
 - National Student Loan Clearinghouse Reporting
 - Loan Data Systems
 - The Regents' Test Load Process
 - The Student Schedule Form
- **Admissions Index Calculations**
- **Immunizations**
 - Maintenance of requirements and data
 - Hold processing

Student

- Georgia ONmyLINE
 - Person Extraction
 - Registration for on-line courses
 - Attendance Verification processing
 - Grade Load processing
- Mass Drop of Students
- Transcripts
 - USG Academic Transcript
 - High School XML Transcript
 - Postsecondary XML Transcript
- SSN Masking for Transcripts
- Voyager Library Interface

Student

- Tuition Classification Changes
- Enrollment Scripts
- Census Scripts
- Anticipated Graduation Date
- AR Acceptance Flag Update

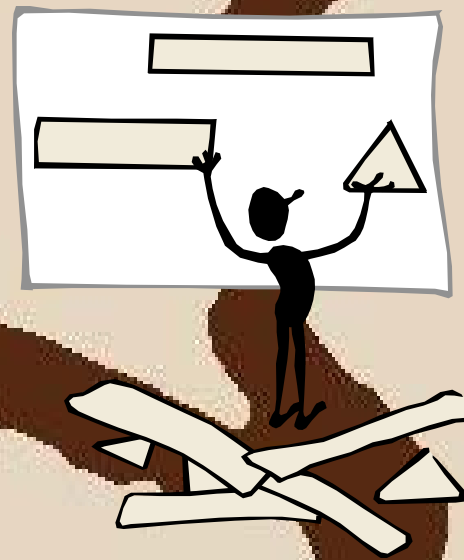
Self-Service



Self-Service

- Attendance Verification
- Transfer Articulation
- Financial Aid Award by Term
 - View Awards – all sources
 - Accept/Reduce Awards
- Release of Banner Holds
 - Faculty/Advisor use
- Student Information Status Summary
- Retrieve ID
- Guaranteed Tuition Plan

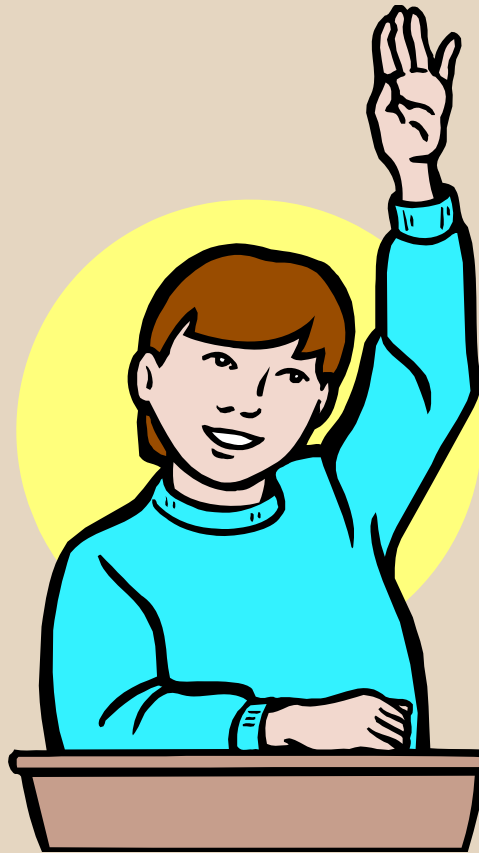
Modifications to Banner Baseline



Modifications to Banner Baseline

- Local Print Solution
- XML Transcript

Questions



Additional OIIT Resources and Support

- To create a new or update an existing production down, business interrupting (emergency) support request, call the OIIT Helpdesk immediately
 - 706-583-2001
 - 1-888-875-3697 (toll free in Georgia)
- For anything else, contact the OIIT Helpdesk at
 - http://www.usg.edu/customer_services (self-service support request) or
 - E-mail helpdesk@usg.edu

Note: Self-Service requires login using a user ID and password. Contact the OIIT Helpdesk at helpdesk@usg.edu to obtain self-service login credentials.

Break Out Sessions

