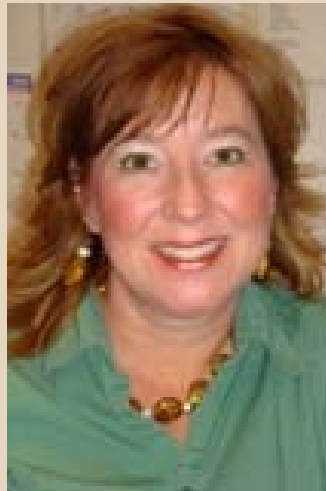# Banner Boot Camp

# Topics for Discussion

- Welcome and Introductions

- The Team

- What is Banner?

- What is OIIT?

- Resources

- Overview of Banner Baseline

- Overview of Georgia Enhancements

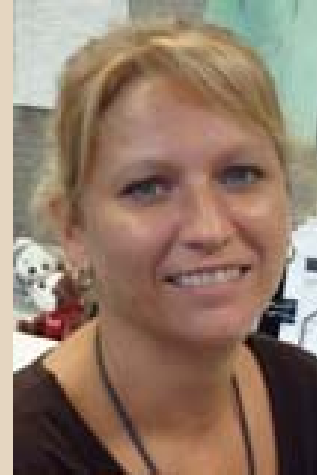- Break out sessions: Financial Aid, Records and Admissions, and Accounts Receivable

# The Team
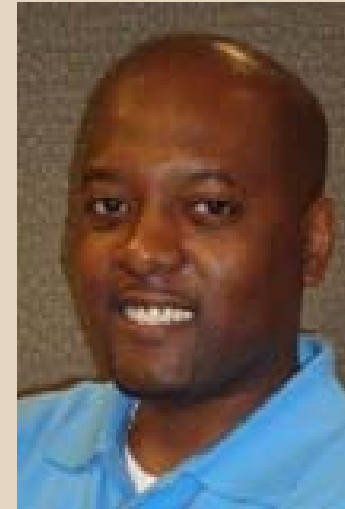
- **Karen Nunn**
  - Banner Project Director

# 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
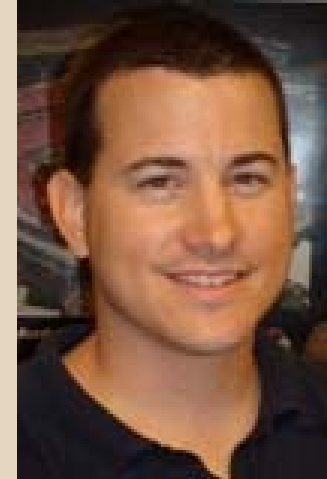    - Change Review

# 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 Priniciples

- **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](mailto:ban_test@usg.edu).

- Business Analyst will contact the user to provide assistance.

- Test results reported to [ban_test@usg.edu](mailto: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
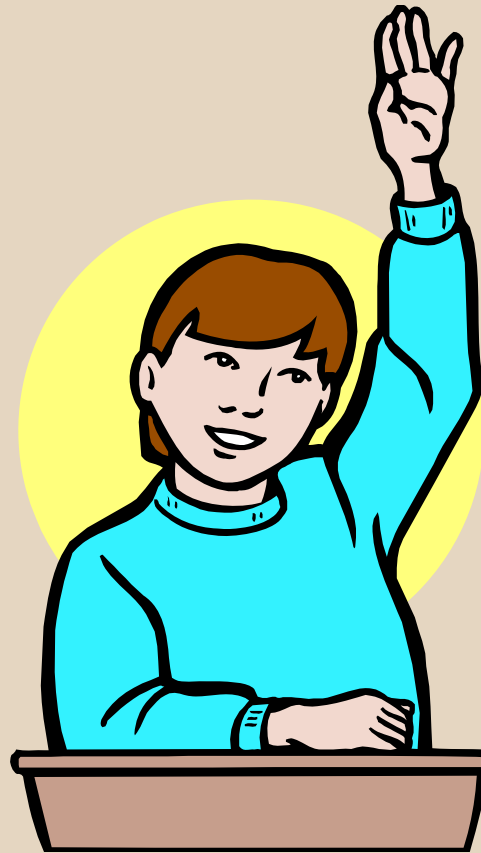
# Resources

# 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.

---

Copyright @ SunGard 1998 - 2004.

Top

Powered by sct

# 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

# 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

## 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 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).

# 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

# User Documentation

- ● Georgia Enhancements Workbooks

# 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

# Web Sites

- ## SunGard Customer Support Center

# Web Sites

- ## SunGard Customer Support Center

# 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

# Web Sites

- ## Banner Production Support

# Web Sites

- **Banner Production Support**

# 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 the following URL:
    http://lists.sungardhe.com/cgi-bin/wa?INDEX
  - Select the list you to which you wish to subscribe.
  - 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@listerv.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 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.

**People (1)**      √X ✋ ☺

AmandaM

To: Main Room

# 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

# Wimba Sessions

# 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.

# SPAPERS

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 | | | | | |

# SP**A**PERS

Form Type:  Application

# Naming Conventions

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

| Accounts Receivable (T) | |
|---|---|
| A | Application form |
| I | Inquiry form |
| P | Process |
| Q | Query form |
| R | Report |
| V | Validation form/table |

| General (G) | |
|---|---|
| A | Application form |
| B | Base table |
| | Batch COBOL process |
| I | Inquiry form |
| O | Online COBOL process |
| Q | Query form |
| R | Rule table/form |
| | Repeating table |
| | Report/process |
| T | General maintenance |
| | Temporary table |
| V | Validation form/table |
| | View |

| Financial Aid (R) | |
|---|---|
| A | Application form |
| B | Base table |
| I | Inquiry form |
| P | Process/report |
| R | Rule table |
| | Repeating rules table |
| | Report |
| T | Temporary table |
| V | Validation form/table |
| | View |

| Information Access/Kiosk (I) | |
|---|---|
| R | Report |

| XtenderSolutions (E) | |
|---|---|
| A | Application form |
| V | Validation form/table |

| Student | |
|---|---|
| A | Application form |
| B | Base table |
| I | Inquiry form |
| P | Process |
| Q | Query form |
| R | Rule table |
| | Repeating table |
| | Report/process |
| 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 | • Rule<br>• Validation<br>• Control |
| Day-to-Day | Staff | • Inquiry<br>• Application<br>• Query<br>• 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 |

# Validation to Rules to Forms/ Processes

- Data on many forms are not accessible without first establishing validation records
  - Example
    - Create a new Fund Code in RFRBASE
    - Fund Source field must be entered
      - Fund Source validated against RTVFSRC
      - Cannot insert a new record into RTVFSRC from RFRBASE
      - Fund Source code must already exist

# 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
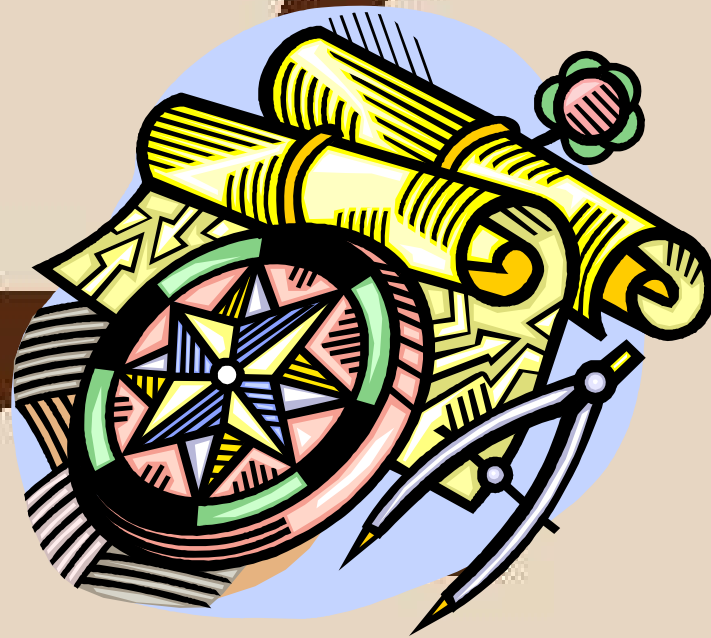
# Navigation

- **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
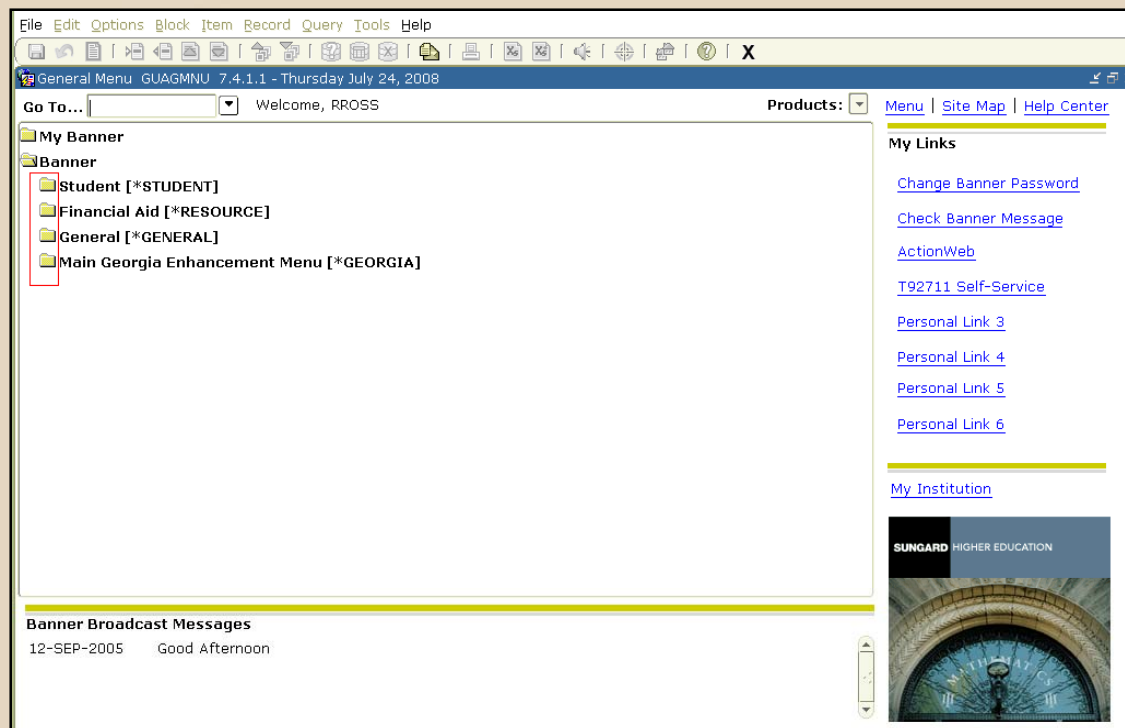
# Direct Access

- **Enter the name of the form (ROASTAT, SPAPERS, SOATERM, etc.) in the Go To field of the Main Menu**
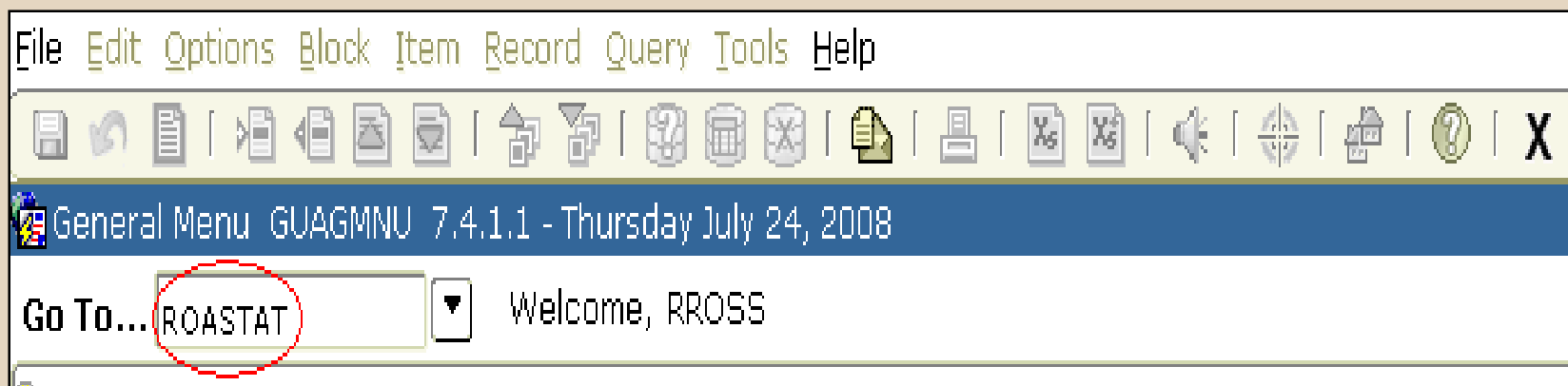
# Site Map
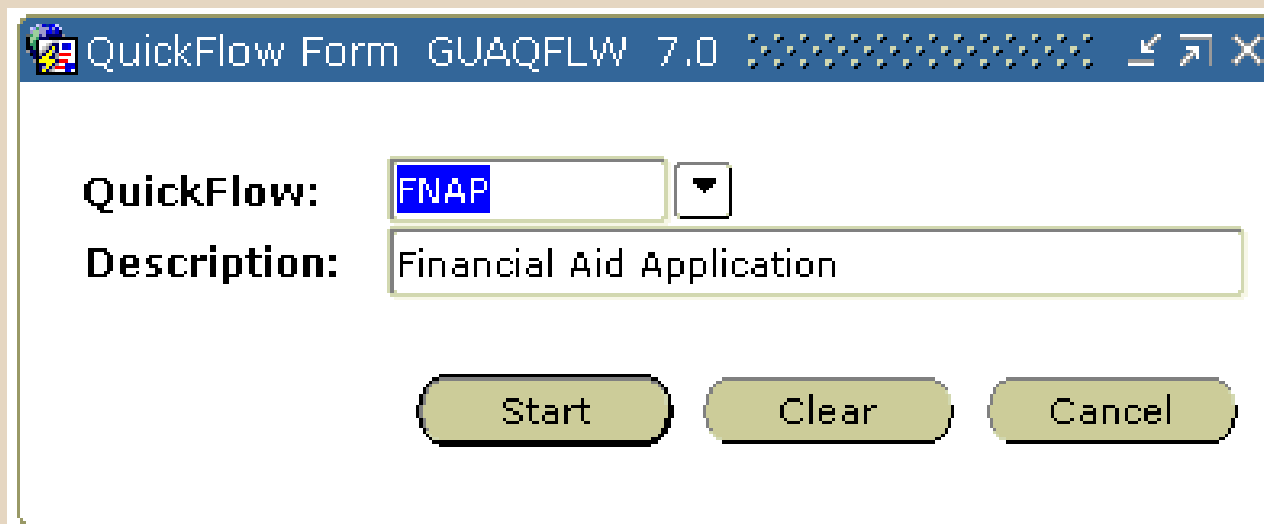
- Provides a general view of the Banner menus

# QuickFlows

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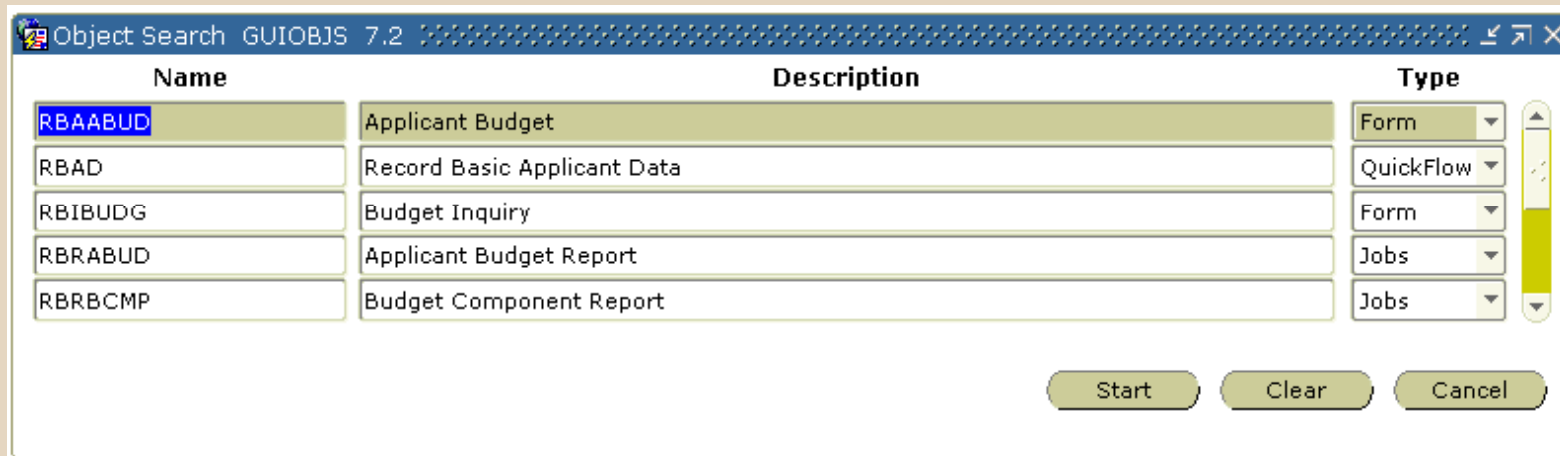
# Object Search

- Enables the user to search for a form without knowing the full name

- Example: all Financial Aid forms begin with the letter 'R'

- Access GUIOBJS

- Use this letter and the wildcard '%' to search for forms that begin with 'R'
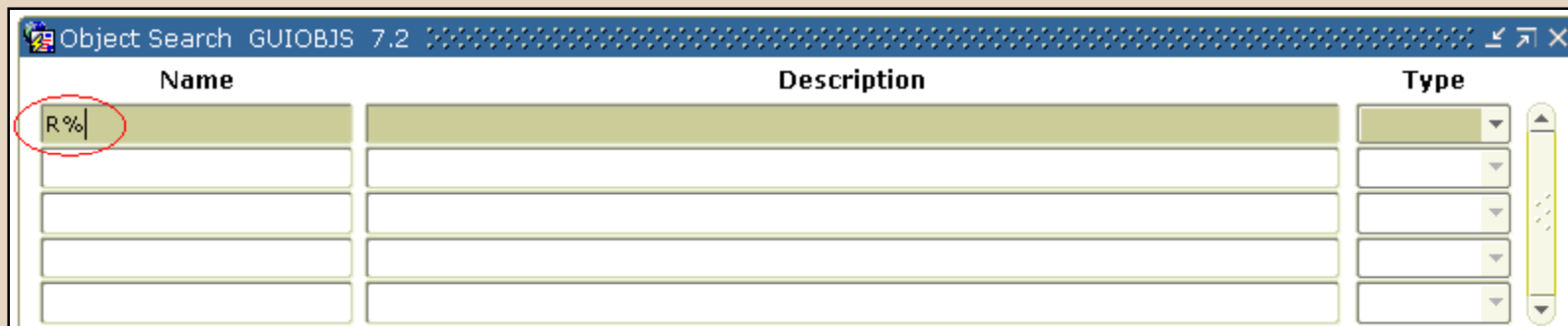
# Object Search

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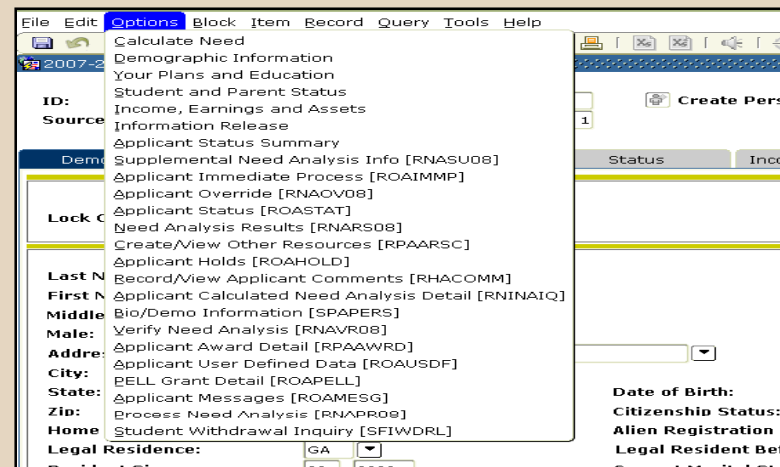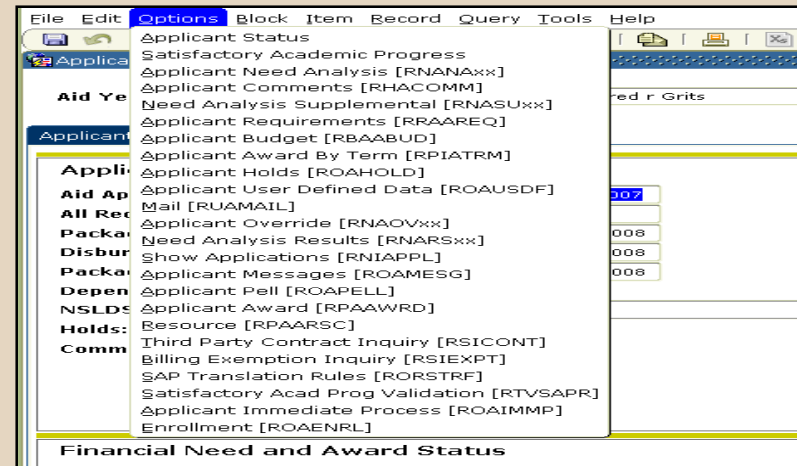- **Then click on name to access object**

# My Banner

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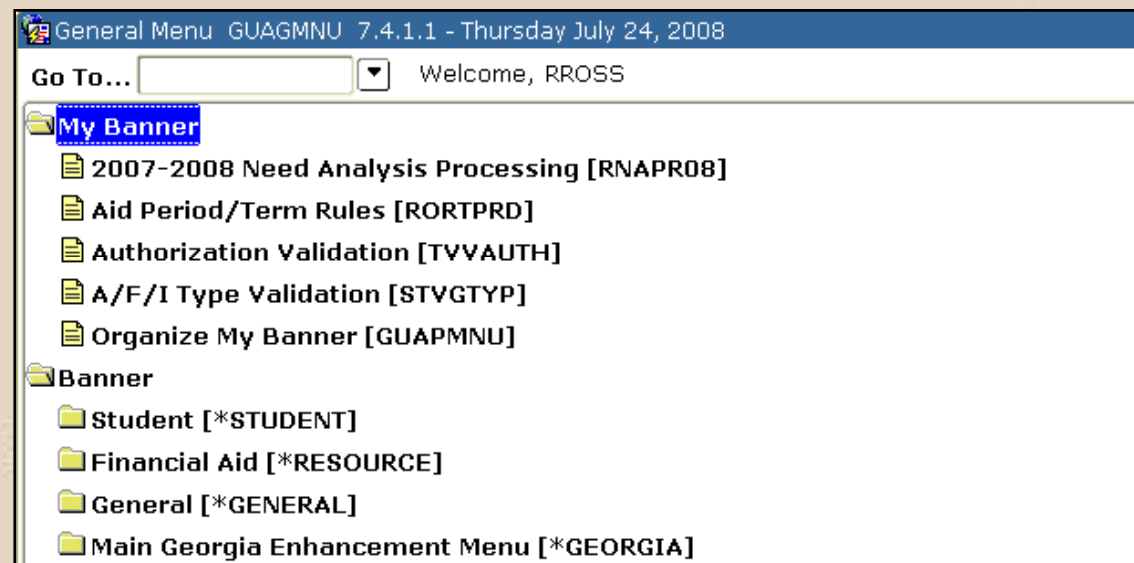
# Options Menu

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

# Form Navigation

# 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)
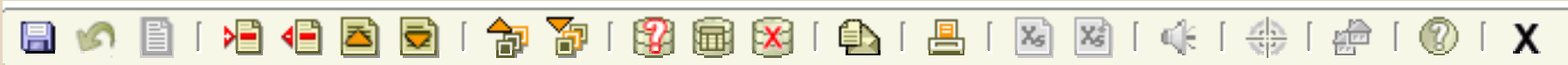


- The bottom picture contains the Key Block in red

- The data entered in the Key Block makes the record unique

# 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 | Enter these criteria |
|---|---|
| All entries that contain *ma* | %ma% |
| All entries that begin with *ma* | ma% |
| All entries that have *ma* as the final two characters | %ma |
| All entries that have *m* as the second character | _m% |
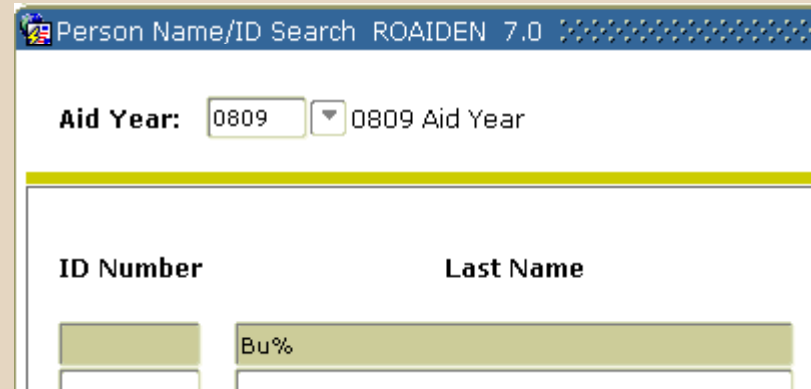
# Query using Wildcards
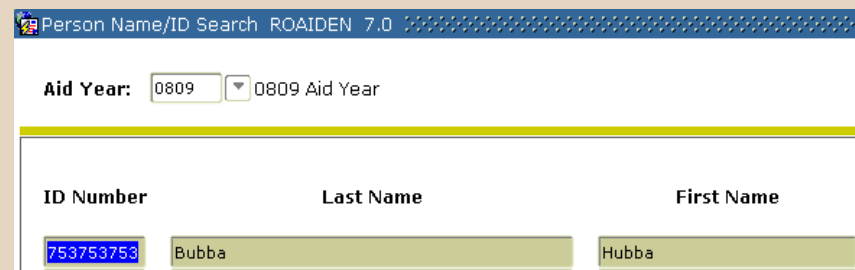
- Search for a last name that begins with 'Bu'
- Execute query and retrieve last name 'Bubba'

# 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

# Questions

# 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
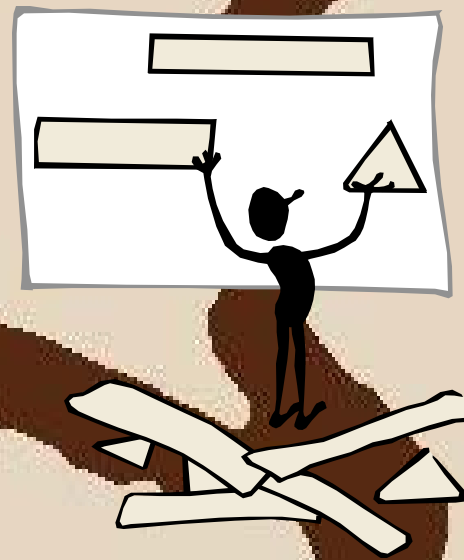- AR Acceptance Flag Update

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
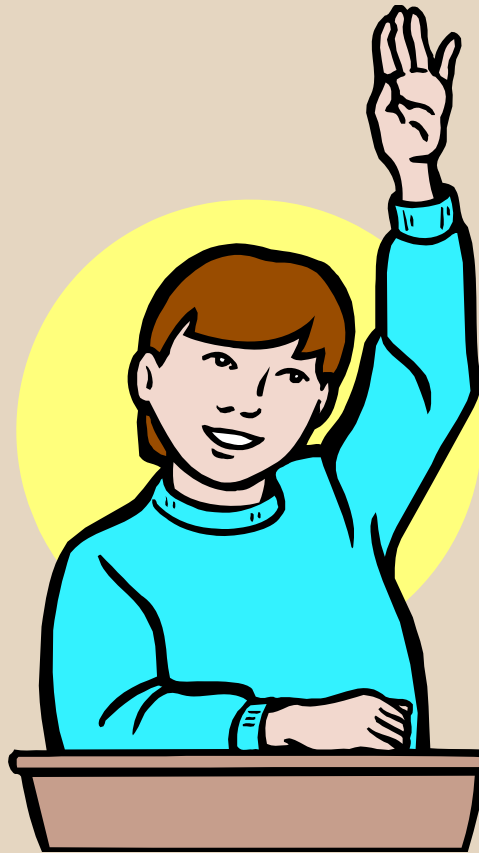- Guaranteed Tuition Plan

# 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