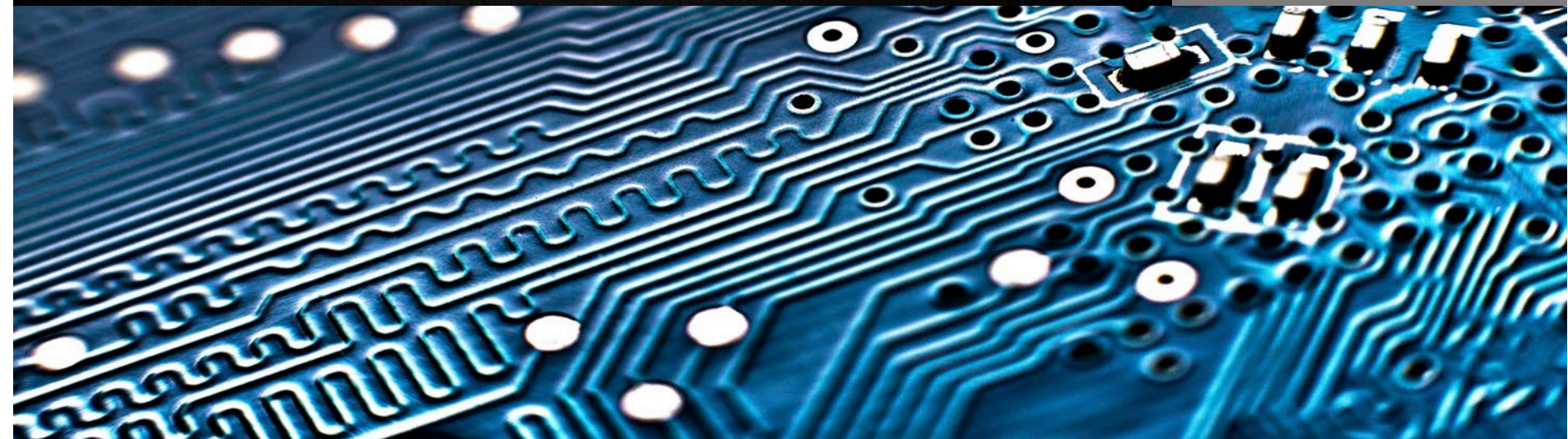
A decorative header featuring several white, paper-cut style clouds of various sizes and shapes, scattered across a light grey background.

The logo of the University System of Georgia, featuring a stylized building with columns inside a circular border with the text "BOARD OF REGENTS OF THE UNIVERSITY SYSTEM OF GEORGIA".

UNIVERSITY SYSTEM OF GEORGIA
Information Technology Services

Train the Trainer: Implementing Action Item Processing 9x May 2023



Agenda

- What is Action Item Processing (AIP)?
- Where is the documentation?
- How to get help?
- What is needed to configure and set-up Action Item Processing?
(Technical/Functional)
- Live Demo
- Willing to share experiences about AIP?

Single Sign-On Health Check

- Perform Single Sign-On (SSO) health check with **all** 3rd party vendors
- Test with vendors to ensure no impact on student's ability to seamlessly move from Banner to vendor websites
 - Take payments
 - Sign up for payment plans
 - Sign up for housing
- Including but not limited to:
 - Touchnet
 - Cashnet
 - Nelnet
 - Star Rez
- Confirm successful SSO prior to Production

What is Action Item Processing (AIP)?

Action Item Processing uses functionality provided by BCM

- Allows the ability to create Action Items
- Allows specific populations to respond
- Allows tracking responses
- Allows halting processes
- Allows attachments

How to get help?

- ITS Helpdesk ticket for GeorgiaBEST team
 - Implementing functionality
 - Self-Service questions
 - Subscribe to a listserv
- If Ellucian expertise required, we will open an Ellucian Customer Center case

Where is the documentation?

GeorgiaBEST website

The screenshot displays the GeorgiaBEST website interface. At the top left, there is a search bar labeled "Search GeorgiaBEST:" with a red search icon. Below the search bar is a navigation menu with the following items: "Home", "Application Development and Support" (with a close icon), "Application Development and Support Information", "Banner" (with a close icon), and "Banner 9" (with a right-pointing arrow). The main content area features the heading "Banner 9" and the sub-heading "What is Banner 9?". Below this, a paragraph states: "The design principles focus on usability, enhanced functions, app configuration over customization of code, extensibility and scalability. When institutions adopt Banner 9, they will see improved usability, new functionality, responsive design, a custom look and a reduction in the cost of ownership." A horizontal navigation bar contains four links: "Elucian Customer Center Information", "Webcasts and Training", "Checklists and Resources" (highlighted in red), and "Technical Information". Below this bar, the link "Implementation Grid" is visible.

Where is the documentation?

- Need an Ellucian Customer Center account?
 - <https://login.ellucian.com/>
 - Click “Sign up for an account”
- Ellucian Customer Center > Resources > Documentation > All Products to access Ellucian Documentation, then use Product A-Z to filter for Banner

Communication Management

Develop and strengthen student relationships with personalized communications and campaigns.

General Self-Service

Empower administrators and staff across the institution to solve departmental needs.

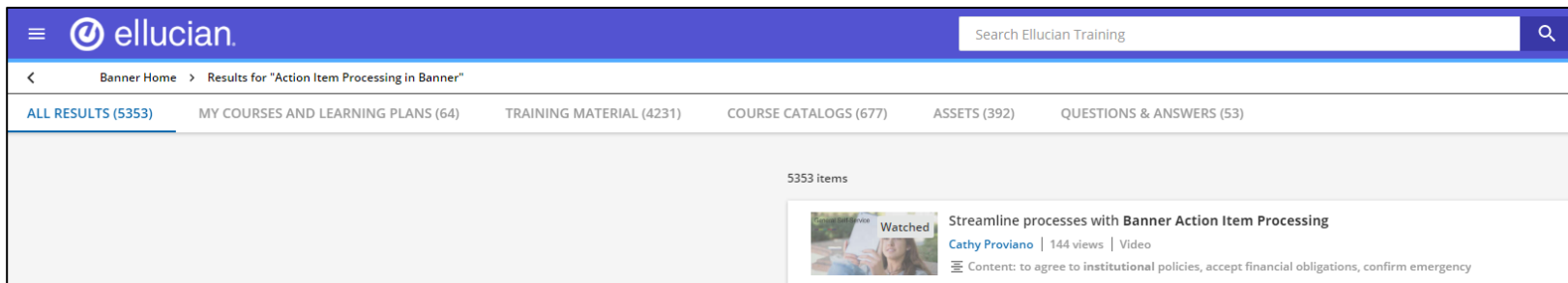
Action Item Processing

Download it!

Where is the documentation?

Login to the Ellucian Customer Center

- Choose Resources
- Knowledge Header
 - Training
 - Search for Banner Action Item Processing



The screenshot shows the Ellucian Customer Center interface. At the top, there is a blue header with the Ellucian logo and a search bar containing the text "Search Ellucian Training". Below the header, a breadcrumb trail reads "Banner Home > Results for 'Action Item Processing in Banner'". A horizontal menu lists various categories: "ALL RESULTS (5353)", "MY COURSES AND LEARNING PLANS (64)", "TRAINING MATERIAL (4231)", "COURSE CATALOGS (677)", "ASSETS (392)", and "QUESTIONS & ANSWERS (53)". The main content area displays "5353 items" and a video thumbnail titled "Streamline processes with Banner Action Item Processing" by Cathy Proviano, with 144 views. The video content description reads: "Content: to agree to institutional policies, accept financial obligations, confirm emergency".

Web Tailor Functions in Banner Self-Service 9 Channel

Banner 8 Web Tailor Functions in Self-Service Banner 9

What? Function formerly performed in Web Tailor	Where? Where to find this function in Self-Service Banner 9	Resources
Display Audit for Banner Self-Service Logins	GUACONF	 Video Display Audit Records  Documentation Banner Self-Service Auditing Feature  Article Banner 9 Self-Service Auditing
Graphic Customizations	Theme Editor	 Video Ellucian Theme Editor Use  Documentation Ellucian Theme Editor Theme Editor Handbook  Article Steps to Use Theme Editor with Self-Service
Information Text	GUAINFO	 Video Edit Information Text  Documentation Banner Self-Service Information Text
LDAP Administration and Login Return Location	Single Sign On (SSO) Configuration	 Handbook Banner Single Sign-On Handbook  Documentation Configure Banner General Self-Service SSO  Documentation Banner Configuration for CAS SSO
User Roles	GUAUSRL	 Video Add and Delete User Roles  Documentation Maintain Self-Service User Roles  Article How to Create a New Role for Banner Self-Service
Web Menus and Procedures	GUASMNU	 Videos Menu Tree Proxy Menu Global Proxy Delete Proxy Pgs.  Documentation Manage Self Service Menus  Article How to Configure the Banner 9 Menu for Self-Service  Article General Self-Service Global Proxy Access Setup
Web Rules and Parameters	GUACONF	 Video Create and Modify Web Rules and Parameters  Documentation Self-Service Rules Self-Service Parameters  Article Web Tailor 9x Administrative Pages for Self-Service
Web Tailor Overrides	Configure Page Components Tool	 Documentation Configure Page Components Tool  Article What Extensibility Tools Are Available for Banner 9x?

Where is the documentation?

000051230 - Updated Steps to setup and test the Action Item Processing (AIP) feature

000041610 - Steps to setup and test the Action Item Processing (AIP) feature

CR-000179100 - Action Item page is not redirecting from Student Self-Service landing page

000051655 - Banner General 9.10 and db-upgrade 9.26 moved the config values for landing page tiles from GORICCR to GUACONF

KB000500749 - SSB9x Platform 9.39 June 2022 changes to config values for configJob and applicationPageRoleJob impacting GUACONF

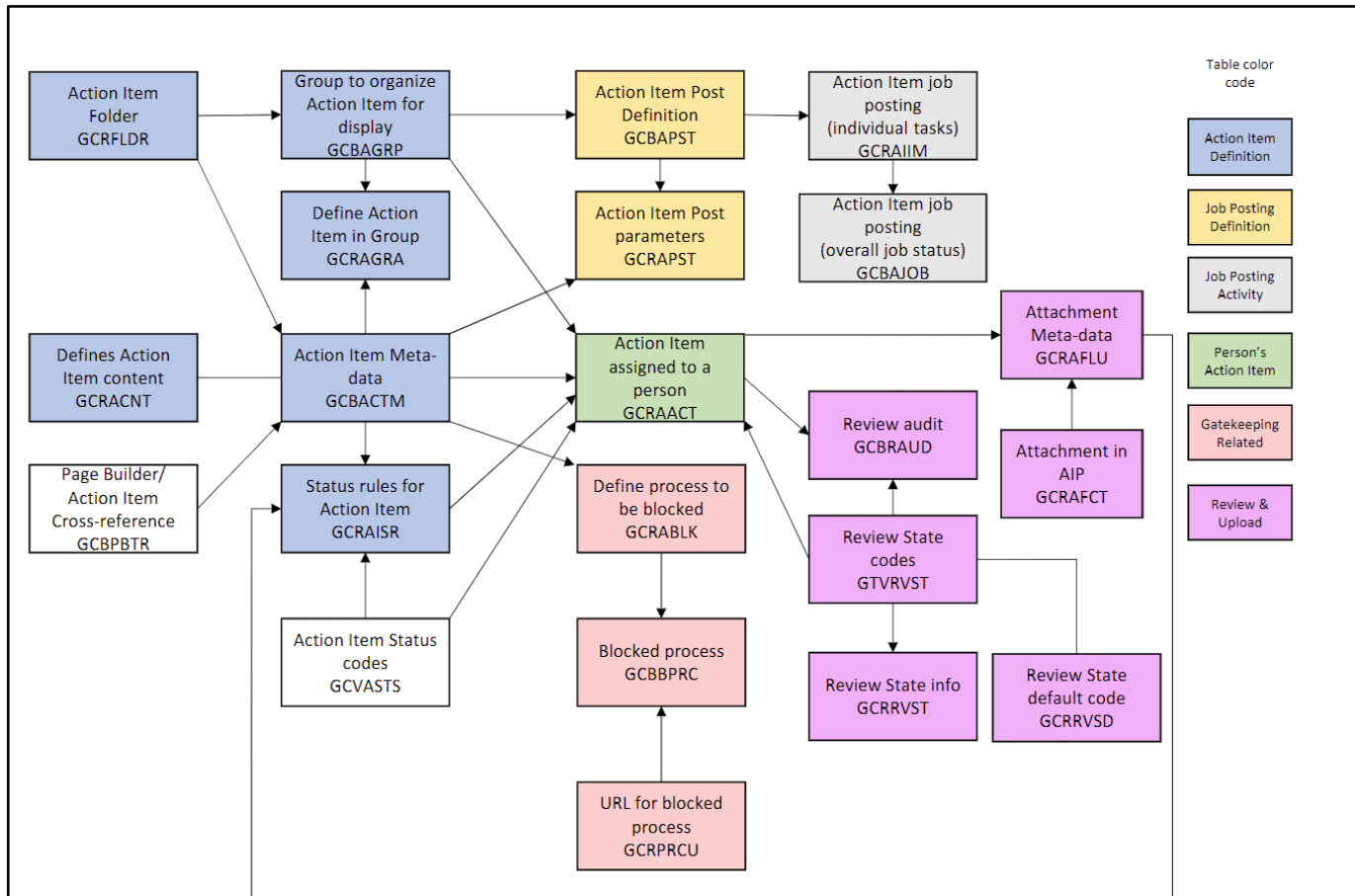
- Changes take 30 minutes to 1 hour for updates to be discoverable

000044581 - Steps to setup and test the Action Item Processing (AIP) Reviewer feature

000047571 - Please explain how to setup the BannerGeneralSsb - Action Item Processing (AIP) menus in WebTailor -- aipAdmin aipReview -- bmenu.P_AipMainMnu

Where is the documentation?

Data Model



What Security configurations are needed? (Functional)

Maintain Self-Service User Roles (GUAUSRL)

Assign roles in Web Tailor Administrator

– ACTIONITEMADMIN

- Action Item Management Administrator

– COMMUNICATIONADMIN

- Communication Management Administrator

What Security configurations are needed? (Functional)

Maintain Self-Service User Roles (GUAUSRL)

Web Tailor Administrator will assign roles based on the user access needed

✕ ellucian Maintain Self-Service User Roles GUAUSRL 9.3.18 (T1997)

ID: 913017430 Miguel Morales

▼ SYSTEM ASSIGNED ROLES

Role
All Web Users
Faculty
Financial Aid user
Student

◀ ◁ 1 of 1 ▷ ▶ | 10 ▾ Per Page

▼ ADD ROLES

Role *	Description
ACTIONITEMADMIN	Action Item Management Administrator
ACTIONITEMREVIEWER	Action Item Management Reviewer
COMMUNICATIONADMIN	Communication Management Administrator
COMMUNICATIONCONTENTADMIN	Communication Management Content Administrator
COMMUNICATIONUSER	Communication Management User
WTAILORADMIN	Web Tailor Administrator

◀ ◁ 1 of 1 ▷ ▶ | 10 ▾ Per Page



What Security configurations are needed? (Technical)

Banner Security for AIP Admins

- Security considerations
- Assign security class BAN_AIPADMIN_C to users to assign them as AIP administrators
- BAN_AIPADMIN_C class needs the CMQUERYEXECUTE object with role of BAN_DEFAULT_M

What configurations are needed? (Technical)

Reference Ellucian Article 000051230:

Configurations needed in the
BannerGeneralSsb_configuration.groovy file

- Enable Banner Page Builder for Action Item Processing

```
pbRoot = "C:/ellucian/pagebuilder" // Example /temp/pb
pageBuilder {
    locations {
        bundle      = "${pbRoot}/i18n"
        page        = "${pbRoot}/page"
        css          = "${pbRoot}/css"
        virtualDomain = "${pbRoot}/virtldom"
    }
}
```

- pbRoot needs to be read/writeable

What configurations are needed? (Technical)

Reference 000051230:

Configurations needed in the
BannerGeneralSsb_configuration.groovy file

- Enable the Action Item Processing Scheduler
- **Change this line from**
 - general.aip.enabled = false
- To**
- general.aid.enabled – true

What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

- Application ID = StuRegSS
- Application Name = StudentRegistrationSsb

The screenshot shows the Banner Applications Configurations GUACONF 9.3.19 interface. The main window has a search bar with 'Application ID: StuRegSS' and 'StudentRegistrationSsb' entered. A 'Go' button is visible. Below the search bar, there is a 'Get Started' instruction: 'Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.'

An 'Application ID's' modal window is open, showing a search criteria field and a table of results:

Application ID	Application Name
StuRegSS	StudentRegistrationSsb
THEME	THEME

The modal window also includes a pagination control showing '2 of 2' records, '20 Per Page', and 'Record 21 of 22'. There are 'Cancel' and 'OK' buttons at the bottom.

What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

StuRegSS = StudentRegistrationSsb

- Click **Configurations** tab
- Filter = GENERAL%
- Insert **Configuration Value** = Institution's URL/BannerGeneralSsb/

Application ID: StuRegSS StudentRegistrationSsb

Application Pages: **Configurations** Self-Service Rules Self-Service Parameters

▼ CONFIGURATIONS

Active filters: Configuration Name: GENERAL% User Preference Indicator: unchecked [Clear All](#) [Filter Again](#)

Configuration Name	Configuration Type	Configuration Value	User Preference Indicator
GENERALLOCATION	string	https://t1997.gabest.usg.edu/BannerGeneralSsb/	<input type="checkbox"/>

1 of 1 Per Page 10 Record 1 of 1

Comments: URL of the General SSB app.

What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

- Application ID = General_SS
- Application Name = General SSB App

Application ID: ***

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

Application ID's

Criteria

Application ID	Application Name
ETHOS_API	ETHOS APPLICATION
ETH_INTAPI	IntegrationApi
ETH_STUAPI	StudentApi
EXTZ	BannerExtensibility
FACSS	FacultySelfService
GENERAL_SS	General SSB App
GLOBAL	GLOBAL
GenEventSS	BannerGeneralEventsManagement
SAAS-BECT	Banner Environment Comparison Tool
SSS	StudentSelfService

1 of 2 | 20 Per Page | Record 16 of 22

What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

GENERAL_SS = General SSB App

- Click **Configurations** tab
- Filter = %enableAction%
- Insert **Configuration Value** = 1

The screenshot shows the Banner Applications Configurations GUACONF 9.3.19 interface. The application ID is GENERAL_SS (General SSB App). The 'Configurations' tab is active. The filter is set to '%enableAction%'. The configuration table shows one record:

Configuration Name	Configuration Type	Configuration Value	User Preference Indicator
generalSsb.enableActionItemsTile	integer	1	<input type="checkbox"/>

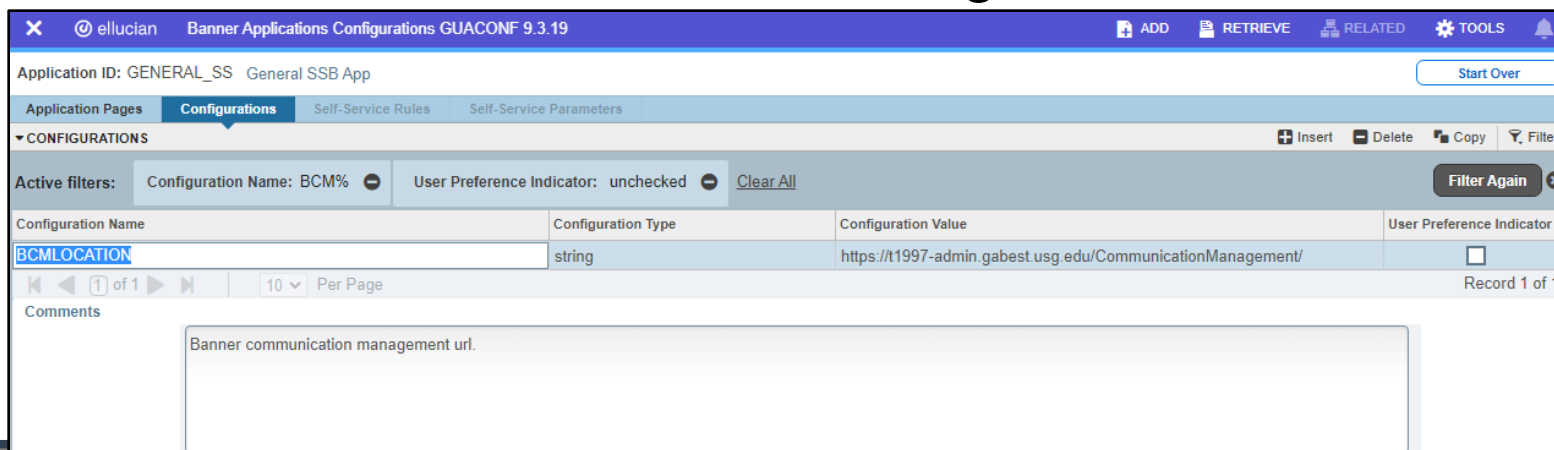
Comments: General SSB: 1-Allow access to Action Item, 0-Deny access

What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

GENERAL_SS = General SSB App

- Click **Configurations** tab
- Filter = BCM%
- Insert **Configuration Value** = Institution's URL/CommunicationManagement/



The screenshot displays the Banner Applications Configurations GUACONF 9.3.19 interface. The top navigation bar includes tabs for Application Pages, Configurations (selected), Self-Service Rules, and Self-Service Parameters. The main content area shows a table of configurations with the following data:

Configuration Name	Configuration Type	Configuration Value	User Preference Indicator
BCMLOCATION	string	https://t1997-admin.gabest.usg.edu/CommunicationManagement/	<input type="checkbox"/>

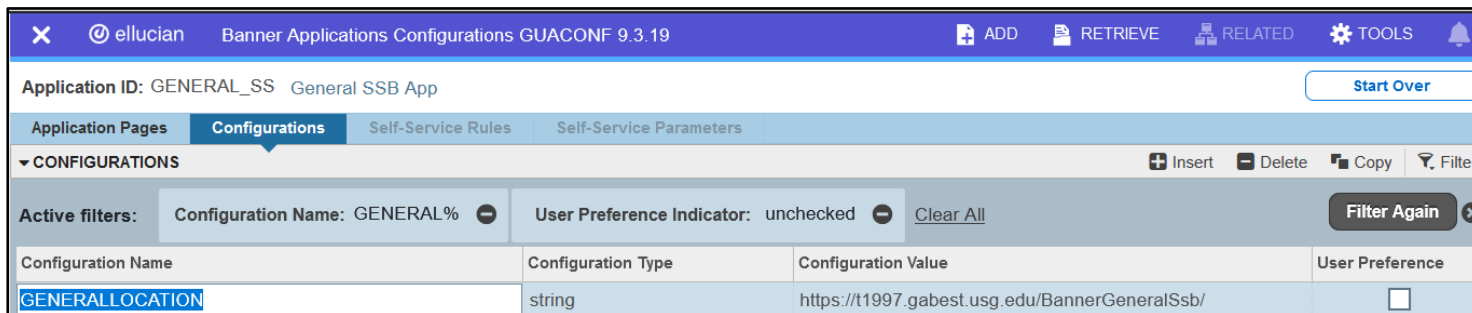
Active filters: Configuration Name: BCM% (checked), User Preference Indicator: unchecked (checked), Clear All, Filter Again. The configuration value is highlighted in blue. The interface also shows a 'Start Over' button, 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' options. The bottom of the screen shows a comments field with the text 'Banner communication management url.' and a page indicator 'Record 1 of 1'.

What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

GENERAL_SS = General SSB App

- Click **Configurations** tab
- Filter = GENERAL%
- Insert **Configuration Value** = Institution's URL/BannerGeneralSsb/



Application ID: GENERAL_SS General SSB App

Application Pages: Configurations | Self-Service Rules | Self-Service Parameters

CONFIGURATIONS

Active filters: Configuration Name: GENERAL% | User Preference Indicator: unchecked | Clear All | Filter Again

Configuration Name	Configuration Type	Configuration Value	User Preference
GENERALLOCATION	string	https://t1997.gabest.usg.edu/BannerGeneralSsb/	<input type="checkbox"/>

What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

GENERAL_SS = General SSB App

- Click **Configurations** tab
- **Filter = %AIP%**
 - BANNER_AIP_BLOCK_PROCESS_PERSONA
 - Insert **Configuration Value** = [EVERYONE, STUDENT, REGISTRAR, FACULTYINSTRUCTOR, FACULTYADVISOR, FACULTYBOTH]
 - BANNER_AIP_REVIEWER_CONTACT_INFORMATION
 - Insert **Configuration Value** = School Name, Address, Email Addresses of the reviewer using a comma-separated list

What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

Banner_AIP_BLOCK_PROCESS_PERSONA

Banner_AIP_REVIEWER_CONTACT_INFORMATION

Application ID: GENERAL_SS General SSB App

Application Pages: Configurations | Self-Service Rules | Self-Service Parameters

Active filters: Configuration Name: %AIP% | User Preference Indicator: unchecked | Clear All | Filter Again

Configuration Name	Configuration Type	Configuration Value	User Preference Indicator
BANNER_AIP_BLOCK_PROCESS_PERSONA	arraylist	[EVERYONE, STUDENT, REGISTRAR, FACULTYINSTRUCTOR, FACULTYADVIS...	<input type="checkbox"/>
BANNER_AIP_REVIEWER_CONTACT_INFORMATION	arraylist	[jackie.lovejoy@usg.edu/, cindy.taylor@usg.edu, john.broz@usg.edu, ITS GeorgiaBE	<input type="checkbox"/>

Record 2 of 2

What setup is needed for Menus? (Functional)

Banner Self-Service Menu Maintenance (GUASMNU)

- Menu Set Up tab - create a Local bmenu.P_AipMainMnu

OR

- Use Article 000047571 for set up in WebTailor

The screenshot displays the Banner Self-Service Menu Maintenance GUASMNU 9.3.20 interface. The 'MENU DETAILS' section shows a table with columns: Menu Name, Menu Description, Baseline/Local, Module Code, Module Description, Comments, Enabled Indicator, Non Secured Access Allowed, Web Page Caching Override, Page Title, and Header Text. Two rows are visible, both for 'bmenu.P_AipMainMnu' with 'Action Items Manage...' as the description. The first row is 'Baseline' and the second is 'Local'. The 'Local' row has the 'Enabled Indicator' checked. Below this, a summary shows 'Menu Name: bmenu.P_AipMainMnu', 'Source: Local', 'Menu Description: Action Items Management', and 'Menu Items: 2/2 (Baseline/Local)'. The 'MENU ITEM DETAILS' section shows a table with columns: Baseline/Local, Sequence Number, URL, Link Text, Link Description, Status Bar Text, and Enabled. It lists three items: 'Maintain Action Items' (URL: https://t1997.gabest.usg.edu/BannerGeneralSsb/aipAdmin) and 'Monitor Action Items' (URL: https://t1997.gabest.usg.edu/BannerGeneralSsb/aipReview), both of which are checked as 'Enabled'.

Menu Name *	Menu Description *	Baseline/Local	Module Code *	Module Description	Comments	Enabled Indicator	Non Secured Access Allowed	Web Page Caching Override	Page Title	Header Text
bmenu.P_AipMainMnu	Action Items Manage...	Baseline	AIP	AIP Self Service		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use System Setting	Action Items Manage...	Action Items Manage...
bmenu.P_AipMainMnu	Action Items Manage...	Local	AIP	AIP Self Service		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Use System Setting	Action Items Manage...	Action Items Manage...

Baseline/Local	Sequence Number *	URL *	Link Text	Link Description	Status Bar Text	Enabled
Baseline		1 URL for Maintain Action Items Page	Maintain Action Items	Maintain Action Items.	Maintain Action Items	<input checked="" type="checkbox"/>
Local		1 https://t1997.gabest.usg.edu/BannerGeneralSsb/aipAdmin	Maintain Action Items	Maintain Action Items.	Maintain Action Items	<input checked="" type="checkbox"/>
Baseline		2 URL for Monitor Action Items Page	Monitor Action Items	Monitor Action Items.	Monitor Action Items	<input checked="" type="checkbox"/>
Local		2 https://t1997.gabest.usg.edu/BannerGeneralSsb/aipReview	Monitor Action Items	Monitor Action Items.	Monitor Action Items	<input checked="" type="checkbox"/>

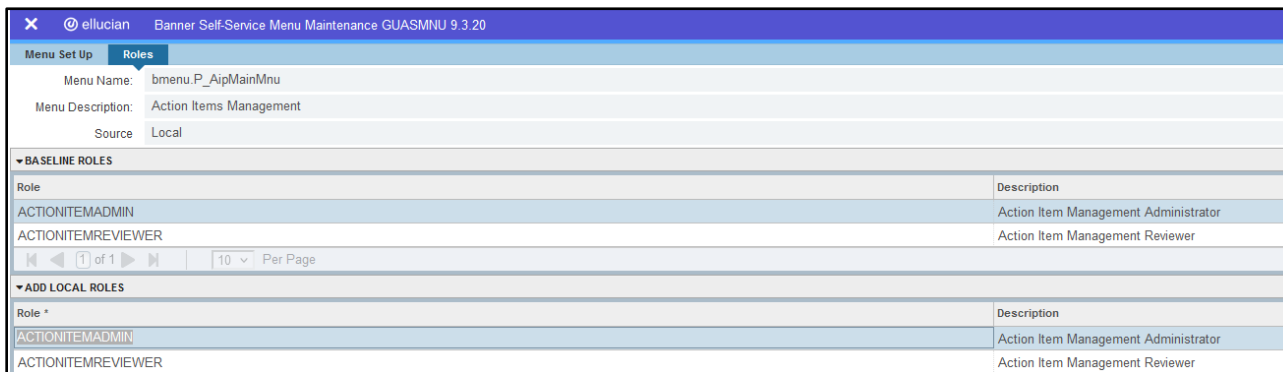
What setup is needed for Roles? (Functional)

Banner Self-Service Menu Maintenance (GUASMNU)

- Roles tab – Add Local Roles
 - ACTIONITEMADMIN
 - ACTIONITEMREVIEWER

OR

- Use Article 000047571 for user set up in WebTailor



The screenshot shows the Banner Self-Service Menu Maintenance GUASMNU Roles tab. The menu name is bmenu_P_AipMainMnu and the menu description is Action Items Management. The source is Local. The roles are listed in two sections: Baseline Roles and Add Local Roles. The roles are ACTIONITEMADMIN (Action Item Management Administrator) and ACTIONITEMREVIEWER (Action Item Management Reviewer).

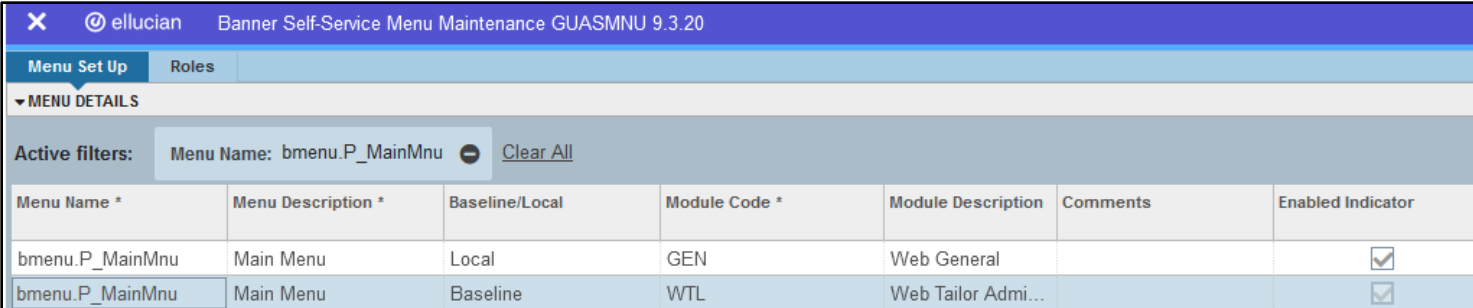
▼BASELINE ROLES	
Role	Description
ACTIONITEMADMIN	Action Item Management Administrator
ACTIONITEMREVIEWER	Action Item Management Reviewer

▼ADD LOCAL ROLES	
Role *	Description
ACTIONITEMADMIN	Action Item Management Administrator
ACTIONITEMREVIEWER	Action Item Management Reviewer

What setup is needed for Menus? (Functional)

Banner Self-Service Menu Maintenance (GUASMNU)

- Create a Local bmenu.P_MainMnu
- OR**
- Use Article 000047571 for set up in WebTailor



The screenshot shows the Banner Self-Service Menu Maintenance GUASMNU 9.3.20 interface. The top navigation bar includes 'Menu Set Up' and 'Roles'. Below this, the 'MENU DETAILS' section is expanded, showing 'Active filters: Menu Name: bmenu.P_MainMnu' with a 'Clear All' link. A table displays the menu details for two entries:

Menu Name *	Menu Description *	Baseline/Local	Module Code *	Module Description	Comments	Enabled Indicator
bmenu.P_MainMnu	Main Menu	Local	GEN	Web General		<input checked="" type="checkbox"/>
bmenu.P_MainMnu	Main Menu	Baseline	WTL	Web Tailor Admi...		<input checked="" type="checkbox"/>

Baseline Setup Defaults (Technical)

Halted Naming Processes GCBBPRC	Default Baseline URL - GCRPCU
Register for Classes	/ssb/term/termSelection?mode=registration
Plan Ahead	/ssb/term/termSelection?mode=plan
Prepare for Registration	/ssb/term/termSelection?mode=preReg
View Registration Information	/ssb/registrationHistory/registrationHistory



Action Item Tables	Actions for Action Item Processing
GCBACTM Action Item Maintenance	Defines main attributes of action items
GCBAGRP Action Item Group	Defines the group for organizing action items display.
GCBAJOB Action Item Job Posting	Action Item Job Posting
GCBAPST Action Item Post	Defines the parameters for an action item post
GCBBPRC	Table to identify processes that can be blocked
GCBPBTR Action Item Page Builder Template	List of values and cross reference for Page Builder page and action item
GCBRAUD Action Item	Review Audit Table
GCRAACT Assigned Action Item	Stores the details of an action item posted for a person
GCRABLK Action Item Block	Defines the process that can be blocked by an action item
GCRACNT Action Item Content	Defines the content of an action item
GCRAFCT AIP Document Content Table	AIP Document Content Table
GCRAFLU AIP Document Metadata Table	AIP Document Metadata Table
GCRAGRA Action Item Group Assignment	Defines the action items assigned to a group
GCRAIIM Action Item Job Posting	Action Item Job Posting
GCRAISR Action Item Status Rule	Defines the status rules for an action item
GCRAPST Action Item Post Detail	Defines the parameters of an action item to be posted.
GCRRVSD Default Action Item Review Status	Action Item Review Status table
GCRRVST Action Item Review Status Rule	Action Item Review Status Rule table
GCVASTS Action Item Status Validation	List of values of statuses for action item status rules
GTVRVST Action Item Review Status Validation	Action Item Review Status Validation table

AIP Live Demo



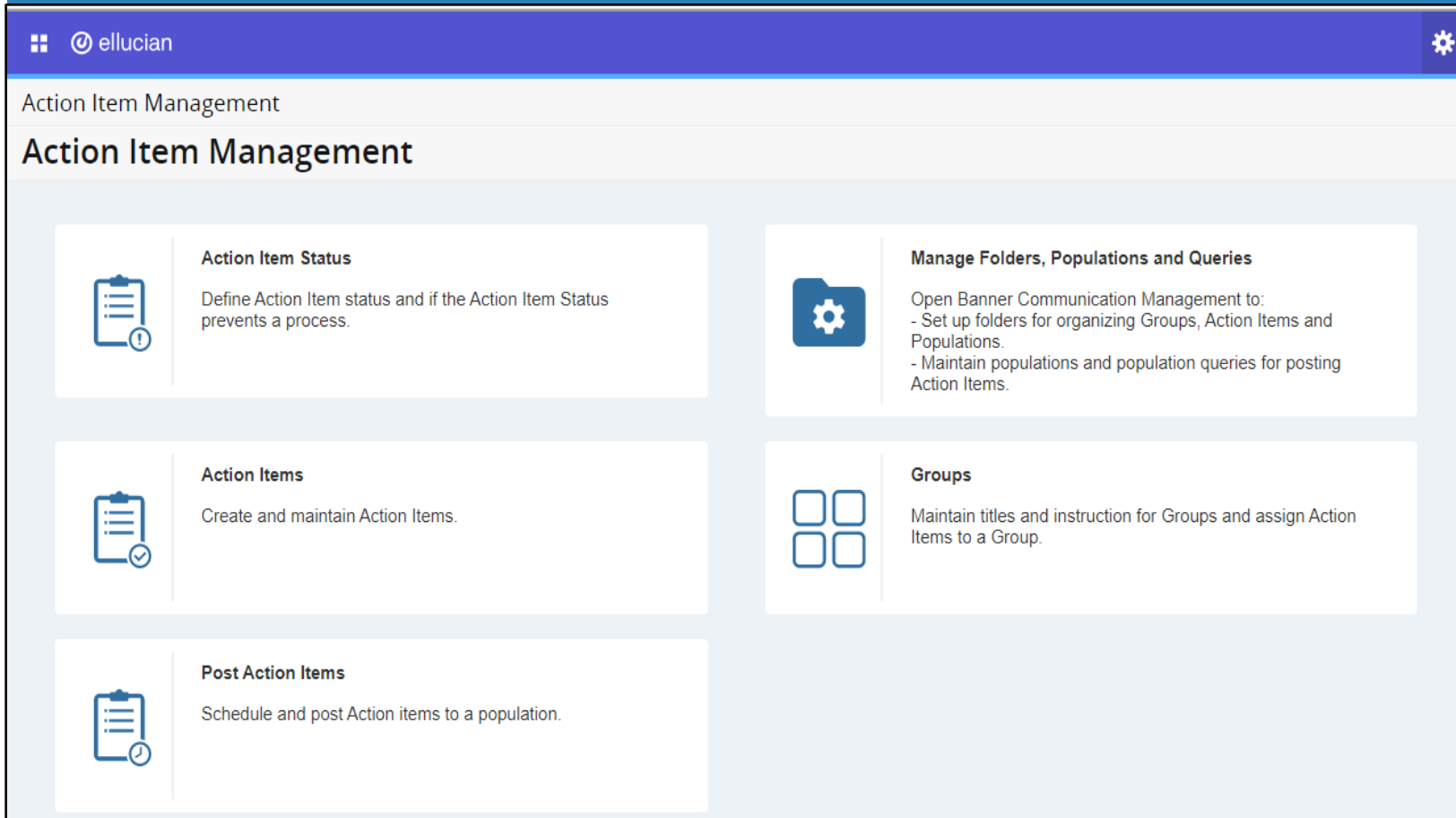
AIP Live Demo – Administrative user

Access Action Item Processing

- Banner General Self-Service
- Click on Action Items Administration

The screenshot displays the Banner General Self-Service interface. On the left is a dark sidebar menu with a hamburger icon at the top. The menu items are: 'Back to Main Menu', 'Applications', 'Banner', 'My Banner', 'My Links', 'Banner Self-Service', 'Student Self-Service', and 'Banner General Self-Service'. The 'Banner General Self-Service' item is highlighted with a red box. The main content area has a purple header with the 'ellucian' logo and the text 'My Profile'. Below the header, the page title is 'My Profile'. A greeting reads 'Hello Jackie Lovejoy, View, edit and update your general information records.' There are two main content cards: 'Personal Information' (with a description: 'View and update your biographical and demographic information.') and 'Action Items Administration' (with a description: 'Maintain Action Item system information'). The 'Action Items Administration' card is highlighted with a red box.

AIP Live Demo – Administrative user



ellucian

Action Item Management

Action Item Management

- Action Item Status**
Define Action Item status and if the Action Item Status prevents a process.
- Action Items**
Create and maintain Action Items.
- Post Action Items**
Schedule and post Action items to a population.
- Manage Folders, Populations and Queries**
Open Banner Communication Management to:
 - Set up folders for organizing Groups, Action Items and Populations.
 - Maintain populations and population queries for posting Action Items.
- Groups**
Maintain titles and instruction for Groups and assign Action Items to a Group.

AIP Live Demo – Action Item Status

Action Item Status – GCVASTS table

- Add Action Item Status Rules as needed
- Show/Hide, Search, or Sort Columns

The screenshot shows the ellucian Action Item Management interface. The title bar indicates the user is logged in as 'ellucian'. The breadcrumb trail shows 'Action Item Management > Action Item Status'. The main heading is 'Action Item Status'. Below this is a table of 'Status Rules'. A red box highlights the 'Show/Hide Column' dropdown and a search input field. The table contains three rows of status rules: 'Completed', 'Rejected', and 'Pending'. The 'Completed' and 'Rejected' rows have a minus sign in the 'Halt Process' column and a green checkmark in the 'System Required' column. The 'Pending' row has a green checkmark in both the 'Halt Process' and 'System Required' columns. The 'Last Updated By' column for all rows is 'BANINST1' and the 'Activity Date' is '08/24/2018'. The 'Action' column contains minus signs. At the bottom, it shows 'Results found: 3' and pagination controls for 'Page 1 of 1' with 'Per Page 10'.

Status	Halt Process	System Required	Last Updated By	Activity Date	Action
Completed	—	✓	BANINST1	08/24/2018	⊖
Rejected	—	✓	BANINST1	08/24/2018	⊖
Pending	✓	✓	BANINST1	08/24/2018	⊖

AIP Live Demo – Action Item Status

Action Item Status - Rules

- Click Add
- Add text
- Click Halt Process as needed
- Save

The screenshot displays the 'ellucian' interface for 'Action Item Management' with a focus on 'Action Item Status'. A modal dialog titled 'Add Action Item Status' is open, containing a text input field with the value 'Do NOT agree' and a checked checkbox for 'Halt Process'. Below the dialog, a table lists status rules. The table has columns for Status, Halt Process, System, Activity Date, and Action. The 'Halt Process' column shows a minus sign for 'Completed' and 'Rejected', and a plus sign for 'Pending'. The 'System' column shows 'BANINST1' for 'Rejected' and 'Pending'. The 'Activity Date' column shows '08/24/2018' for all rows. The 'Action' column shows a minus sign for all rows.

Status	Halt Process	System	Activity Date	Action
Completed	-		08/24/2018	-
Rejected	-	BANINST1	08/24/2018	-
Pending	+	BANINST1	08/24/2018	-

AIP Live Demo – Action Item Status

- Delete by selecting the – under Action

Action Item Management • Action Item Status

Action Item Status

+ Add

Status Rules								Show/Hide Column	Q
Status	Halt Process	System Required	Last Updated By	Activity Date	Action				
Completed	—	✓	BANINST1	08/24/2018	⊖				
Rejected	—	✓	BANINST1	08/24/2018	⊖				
Do NOT agree	✓	—	BLYMAN	05/03/2023	⊖				
NO	✓	—	JLOVEJOY	03/31/2023	⊖				
Pending	✓	✓	BANINST1	08/24/2018	⊖				

AIP Live Demo – Action Item Status

Action Item Management • Action Item Status

Action Item Status

⚠ Are you sure you want to delete the Action Item Status Rule?

No

Yes

Status Rules

Show/Hide Column



Status	Halt Process	System Required	Last Updated By	Activity Date	Action
Completed	—	✓	BANINST1	08/24/2018	⊖
Rejected	—	✓	BANINST1	08/24/2018	⊖
Do NOT agree	✓	—	BLYMAN	05/03/2023	⊖
NO	✓	—	JLOVEJOY	03/31/2023	⊖
Pending	✓	✓	BANINST1	08/24/2018	⊖



AIP Live Demo – Action Item Status

Action Item Management • Action Item Status

✓ Delete successful.

Action Item Status

+ Add

Status Rules

Show/Hide Column



Status	Halt Process	System Required	Last Updated By	Activity Date	Action
Completed	—	✓	BANINST1	08/24/2018	⊖
Rejected	—	✓	BANINST1	08/24/2018	⊖
NO	✓	—	JLOVEJOY	03/31/2023	⊖
Pending	✓	✓	BANINST1	08/24/2018	⊖



AIP Live Demo – Action Items

- Displays existing Action Items (GCBACTM)

Action Item Management • Action Items

Action Items

+ Add

Selectable Action Items Show/Hide Column

Action Item	Folder	Status	Posted	Last Updated By	Activity Date	Actions
AIP_DEMO_ITEM	CM_Student	Active	<input checked="" type="checkbox"/> Posted	BLYMAN	05/03/2023	
AIP_DEMO_ITEM_TEST	CM_Student	Active	<input checked="" type="checkbox"/> Posted	BLYMAN	04/28/2023	
AIP_DEMO_LMM	CM_Student	Active	<input checked="" type="checkbox"/> Posted	BLYMAN	04/28/2023	

AIP Live Demo – Action Items

Action Item * 60 character max

AIP_DEMO_ITEM

Folder *

CM_Student

Status *

Draft

Action Item Title * 300 character max

Action Item Title: Student Financial Responsibility Agreement

Description * *Plain Text*

Action Item Description:
Students must click in this area to display the Action Item.
Students will need to complete the requested information in order to proceed with Registration.
The action item is located on the right-hand side after clicking in this area.

Cancel Save

AIP Live Demo – Action Items

Overview > Edits allowed until Action Item is Posted

Overview

Halted Processes

Action Item Content

Action Item

AIP_DEMO_ITEM

Folder

CM_Student

Status

Active

Action Item Title

Action Item Title: Student Financial Responsibility Agreement

Description

Action Item Description:

Students must click in this area to display the Action Item.

Students need to complete the requested information in order to proceed with Registration.

The action item is located on the right-hand side after clicking in this area.

Edit

Last Updated By

BLYMAN

Activity Date

05/03/2023

AIP Live Demo – Action Items

Halted Processes

- Click Edit Information

Overview

Halted Processes

Action Item Content

Halted Process(es)

This Action Item is not associated to halted processes.
Select Edit to associate halted process.

 [Edit Information](#)



AIP Live Demo – Action Items

Halted Processes

- Choose Process dropdown to Halt
 - Located in the GCBBPRC table
- Choose the Persona dropdown to Halt
 - Located in GUACONF – GENERAL_SS
 - GENERAL_SS configurations tab
 - Filter for BANNER_AIP_BLOCK_PROCESS_PERSONA
- Save

AIP Live Demo – Action Items

Halted Processes

- “No Overall Access” check box will not allow any processing to occur
- Edits allowed until the Action Item is sent

Overview

Halted Processes

Action Item Content

Halted Process(es)

[Edit Information](#)

No Overall Access

Process	URL	Persona
Register for Classes	/ssb/term/termSelection?mode=registration	Student



AIP Live Demo – Action Items

Action Item Responses

- Enter Response Option Text* (required)
- Enter Status* (required)
- Check the Need Review box as needed
- Save

Action Item Responses

Set up one or more options with the corresponding status for the user to select a response to this action item.

Response Option Text *	Status *	Need Review	Maximum Attachments
<input type="text" value="I agree to all the terms and conditions above"/>	<input type="text" value="Completed"/>	<input type="checkbox"/>	<input type="text" value="00"/>
<input type="text" value="I do not agree, too long to read"/>	<input type="text" value="NO"/>	<input checked="" type="checkbox"/>	<input type="text" value="00"/>

[+ Add Response Option](#)

Cancel

Save

AIP Live Demo - Groups

Action Item Management • Groups

Groups

+ Add

Groups										Show/Hide Column	Search
Group	Folder	Status	Posted	Last Updated By	Activity Date	Actions					
AIP_DEMO_GROUP	CM_Student	Active	<input checked="" type="checkbox"/> Posted	BLYMAN	05/03/2023	⊕ ⊖					
AIP_DEMO_GROUP_TEST	CM_Student	Active	<input checked="" type="checkbox"/> Posted	BLYMAN	04/28/2023	⊕ ⊖					
AIP_DEMO_TEST	CM_Student	Active	<input checked="" type="checkbox"/> Posted	BLYMAN	04/28/2023	⊕ ⊖					



AIP Live Demo – Groups

Overview

Group Action Items

Group

AIP_DEMO_GROUP

Folder

CM_Student

Status

Active

Group Title

Group Title: AIP Demo Group Title - Financial Agreement

Group Instruction

Group Instructions:

Students must agree to the terms and conditions to move forward with Registration.

 Edit

Activity

Last Updated By

BLYMAN

Activity Date

05/03/2023



AIP Live Demo – Groups

Add Action Item(s)

Overview

Group Action Items

Add and Order Action Items

Action Items

AIP_DEMO_ITEM
Active | CM_Student



+ Add Action Item

Cancel

Save



AIP Live Demo - Groups

Overview

Group Action Items

Add and Order Action Items

Important: Action Item status must be set to Active in order to be selected when setting the parameters to Post Action Items.

[Edit](#)

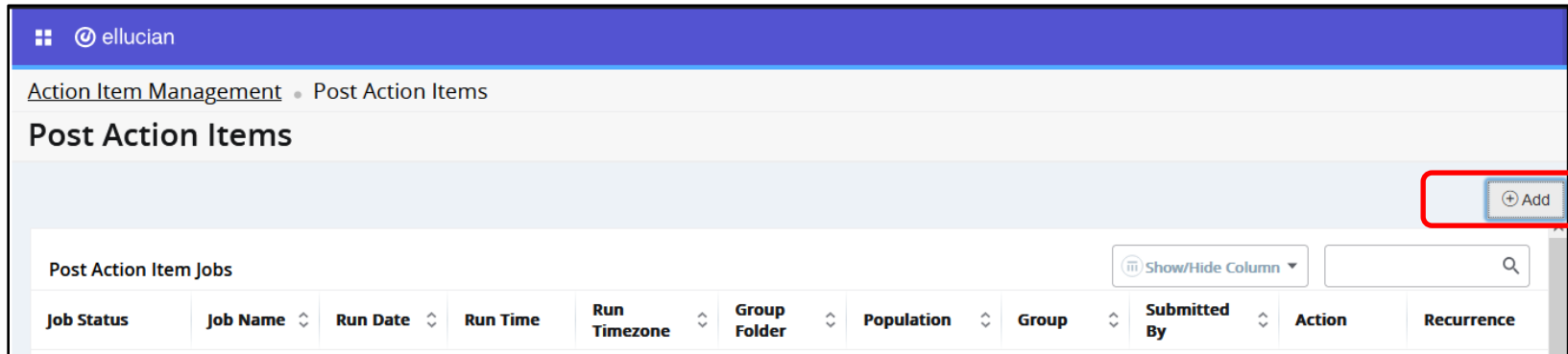
Group Action Items

Action Items	Status	Folder	Action Item Title/Description
AIP_DEMO_ITEM	Active	CM_Student	<p>Action Item Title: Student Financial Responsibility Agreement</p> <p>Action Item Description: Students must click in this area to display the Action Item.</p> <p>Students need to complete the requested information in order to proceed with Registration.</p> <p>The action item is located on the right-hand side after clicking in this area.</p>

AIP Live Demo – Post Action Items

Post Action Items

- Click Add



The screenshot displays the ellucian Action Item Management interface. The breadcrumb navigation shows 'Action Item Management' > 'Post Action Items'. The main heading is 'Post Action Items'. In the top right corner, there is a blue button with a plus sign and the text 'Add', which is highlighted with a red rectangular box. Below this, there is a section titled 'Post Action Item Jobs' with a 'Show/Hide Column' dropdown and a search input field. A table with the following columns is visible: Job Status, Job Name, Run Date, Run Time, Run Timezone, Group Folder, Population, Group, Submitted By, Action, and Recurrence.

AIP Live Demo – Post Action Items

Post Action Items

- Enter Posting Job Name (unique)
 - Select Group created prior
 - Click Add/Edit and choose the Action Item(s) and Save
 - Choose Population Name
 - Regenerate Population if a Recurring Posting
- OR**
- Post Now
 - Choose the Display Start and End Dates
 - Save

AIP Live Demo – Post Action Items

Posting Job Name *

AIP_DEMO_POST

Group *

AIP_DEMO_GROUP

Action Items *

You must choose at least one action item from the group before the job can be posted.

[Add/Edit](#) 1 Items selected

Population Name *

AIP_DEMO_QUERY

Regenerate Population prior to Posting


Post Now


One Time Posting

Recurring Posting

Display Dates:

Records will be inserted into the Assigned Action Item table where the Start Date and the End Date do not overlap with an existing date range for the same Group, Action Item and Person.

Display Start Date * 05/03/2023 

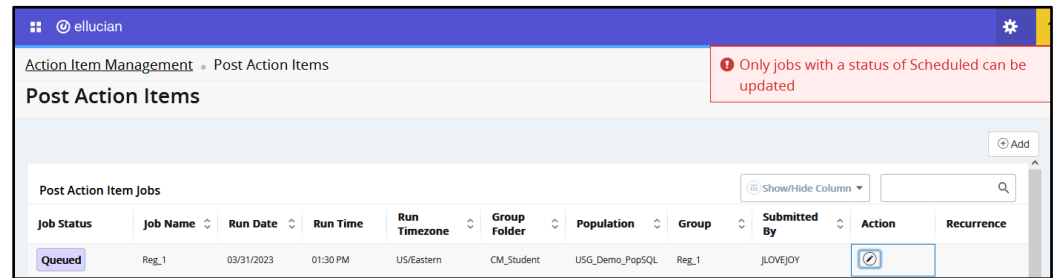
Display End Date * 07/27/2023 



AIP Live Demo – Post Action Items

Post Action Items – Post Action Item Jobs

- Job Status
- Queued
- Scheduled
- Only jobs with status of Scheduled can be updated
- Complete



elucian

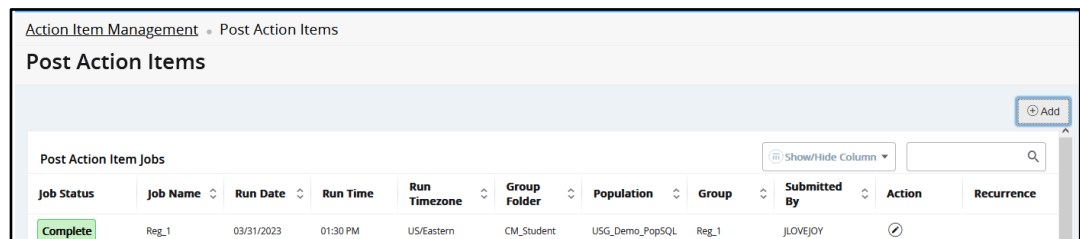
Action Item Management - Post Action Items

Post Action Items

Only jobs with a status of Scheduled can be updated

Post Action Item Jobs

Job Status	Job Name	Run Date	Run Time	Run Timezone	Group Folder	Population	Group	Submitted By	Action	Recurrence
Queued	Reg_1	03/31/2023	01:30 PM	US/Eastern	CM_Student	USG_Demo_PopSQL	Reg_1	JLOVEJOY		



Action Item Management - Post Action Items

Post Action Items

Post Action Item Jobs

Job Status	Job Name	Run Date	Run Time	Run Timezone	Group Folder	Population	Group	Submitted By	Action	Recurrence
Complete	Reg_1	03/31/2023	01:30 PM	US/Eastern	CM_Student	USG_Demo_PopSQL	Reg_1	JLOVEJOY		

AIP Live Demo – Monitor Action Item

- Four Square Tile in Top Left

ellucian

Action Item Management

Action Item Management

Action Item Status

Define Action Item status and if the Action Item Status prevents a process.

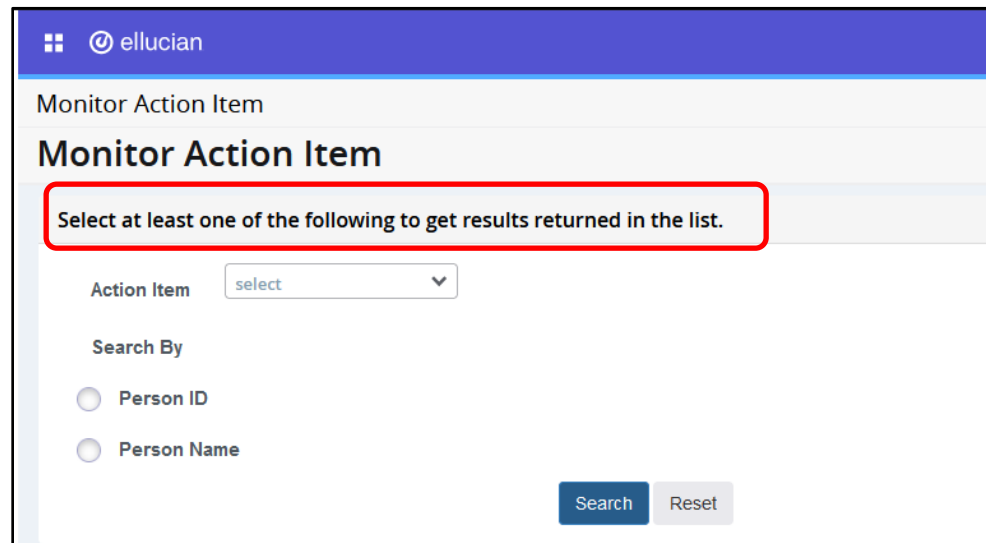
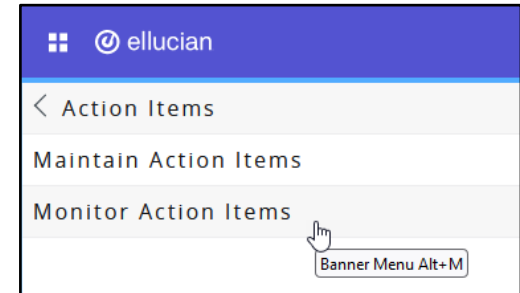
Action Items

Create and maintain Action Items

AIP Live Demo – Monitor Action Item

Banner -> Action Items

- Click on Monitor Action Items
 - Select the Action Item
- OR
- Select the radio buttons
 - Person ID
 - Person Name
 - Click Search
 - Choose Reset to see the next student

A screenshot of the 'Monitor Action Item' search form. The top bar is blue with the ellucian logo. Below it, a white bar contains the text 'Monitor Action Item'. The main heading is 'Monitor Action Item'. A red box highlights the instruction: 'Select at least one of the following to get results returned in the list.' Below this, there is a dropdown menu for 'Action Item' with 'select' in the box. Under 'Search By', there are two radio buttons: 'Person ID' and 'Person Name'. At the bottom right, there are 'Search' and 'Reset' buttons.

AIP Live Demo – Monitor Action Item

Monitor Action Item

Monitor Action Item

Select at least one of the following to get results returned in the list.

Action Item

AIP_DEMO_ITEM2

Search By

Person ID

Person Name

Search

Reset

Action Items

Name	ID	Group	Action Item	Status	Status date	Response
Student, Miguel	913261221	AIP_DEMO_GROUP2	AIP_DEMO_ITEM2	Pending		



AIP Live Demo – User Experience

- Register for Classes will generate new prompt
 - Cancel will return to previous menu
 - Continue will send to Action Item

Action Item Processing

You have Action Items pending that halt access to this process.

Continue to resolve your Action Items.
Cancel to return to previous page.

CANCEL | CONTINUE

AIP Live Demo – User Experience

Action Item Processing

Action Item Processing

Welcome

You have the following items that require your attention.

Continue

AIP DEMO Group Title -
Financial Agreement



1

[Instructions](#)

End Date: 07/27/2023

[Item Title: Student Financial Responsibility Agreement](#)

Pending

Halt Processes:

Register for Classes

Item Description:

Students must click in this area to display the Action Item.

Students will need to complete the requested information in order to proceed with Registration.

The action item is located on the right-hand side after clicking in this area.

AIP DEMO Group Title - Financial Agreement

Group Instructions:

Students must agree to the terms and conditions to move forward with Registration.

AIP Live Demo – User Experience

- Note the Group Title and Group Instructions are showing to the right
- Action Item(s) are listed below the group with the Item Description, and have a status of Pending
- User must click in the Action Item area to bring up the content of the Action Item

AIP Live Demo – User Experience

Action Item Processing

Action Item Processing

Welcome

You have the following items that require your attention.

Continue

AIP DEMO Group Title -
Financial Agreement



1

[Instructions](#)

End Date: 07/27/2023

[Item Title: Student Financial Responsibility Agreement](#)

Pending

Halt Processes:

Register for Classes

Item Description:

Students must click in this area to display the Action Item.

Students will need to complete the requested information in order to proceed with Registration.

The action item is located on the right-hand side after clicking in this area.

Item Title: Student Financial Responsibility Agreement

This Agreement is entered into between the Student and the Board of Regents of the University System of Georgia, by and on behalf of *ITS University*. In exchange for registering for classes and receiving education services from *ITS University*, I understand and agree that my eligibility to enroll in classes is expressly conditioned upon acceptance of all terms and conditions set forth in this Agreement. I understand and agree to the following:

1. When I register for any class at *ITS University* or receive any service from *ITS University*, I accept full responsibility to pay all tuition, fees and other associated costs assessed as a result of my registration and/or receipt of services on or before the due date.
2. If I drop or withdraw from some or all of the classes for which I register, I will be responsible for paying all or a portion of tuition and fees in accordance with the published refund schedule.
3. I am personally responsible for payment of all money due regardless of my eligibility for financial aid or other assistance.
4. Financial aid or other financial assistance I may receive will be used to pay any and all money due to *ITS University*, including tuition, fees, campus housing and meal plans, student health insurance.



• Scroll down to see the result options

communication regarding any amounts that remain due and owing to *ITS University*.

9. I am subject to and responsible for complying with all applicable *ITS University* and Board of Regents of the University System of Georgia policies and procedures.
10. This Agreement shall be governed by the laws of the State of Georgia without regard to choice of law's provisions, and all actions arising under this Agreement will be filed and litigated exclusively in the appropriate courts within the State of Georgia.

- I agree to all the terms and conditions above
- I do not agree, too long to read

Save

AIP Live Demo – User Experience

- Users selects to not agree

9. I am subject to and responsible for complying with all applicable the University System of Georgia policies and procedures.

10. This Agreement shall be governed by the laws of the State provisions, and all actions arising under this Agreement will appropriate courts within the State of Georgia.

- I agree to all the terms and conditions above
 I do not agree, too long to read

Save

AIP Live Demo – User Experience

- Status is set to NO

Action Item Processing

Action Item Processing

Welcome

You have the following items that require your attention.

Continue

End Date:07/27/2023

[Item Title: Student Financial Responsibility Agreement](#)

 NO

Response saved on:05/04/2023

Current Response:I do not agree, too long to read

Current Review Status: Review needed

Halt Processes:

Register for Classes

Item Description:

Students must click in this area to display the Action Item.

Students will need to complete the requested information in order to proceed with Registration.

The action item is located on the right-hand side after clicking in this area.

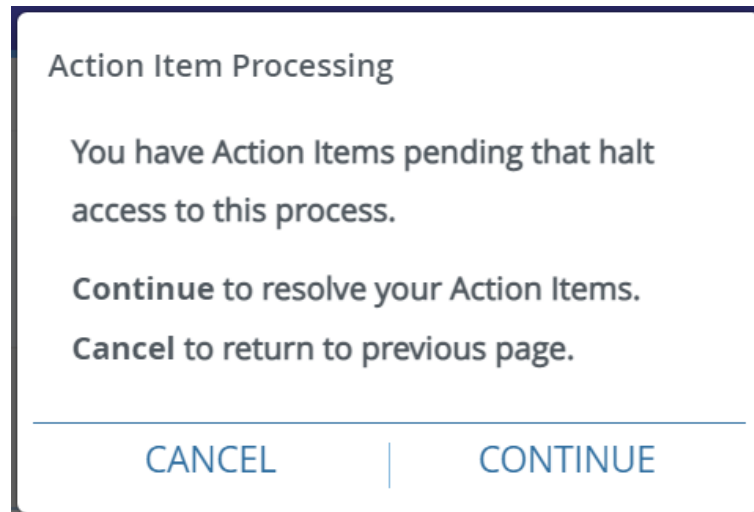
Item Title: Student Financial Responsibility Agreement

This Agreement is entered into between the Student and the Board of Regents of the University System of Georgia, by and on behalf of *ITS University*. In exchange for registering for classes and receiving education services from *ITS University*, I understand and agree that my eligibility to enroll in classes is expressly conditioned upon acceptance of all terms and conditions set forth in this Agreement. I understand and agree to the following:

1. When I register for any class at *ITS University* or receive any service from *ITS University*, I accept full responsibility to pay all tuition, fees and other associated costs assessed as a result of my registration and/or receipt of services on or before the due date.
2. If I drop or withdraw from some or all of the classes for which I register, I will be responsible for paying all or a portion of tuition and fees in accordance with the published refund schedule.
3. I am personally responsible for payment of all money due regardless of my eligibility for financial aid or

AIP Live Demo – User Experience

- User selects Continue, but is redirected to Action Item processing
- User unable to adjust result option due to the action needing review now



AIP Live Demo – Review Action Item

- Return to Monitor Action Item to Review the Action Item

Monitor Action Item

Monitor Action Item

Select at least one of the following to get results returned in the list.

Action Item

Search By

- Person ID
 Person Name

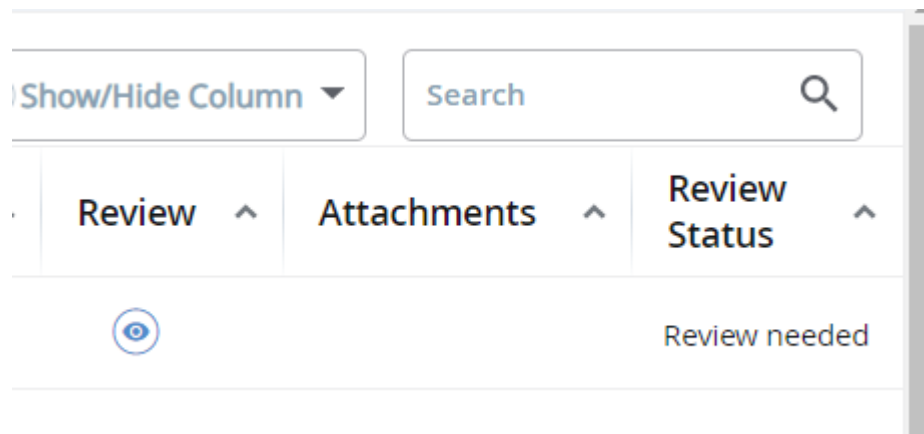
Action Items

Show/Hide Column

Name ^	ID ^	Group ^	Action Item ^	Status ^	Status date ^	Response ^	Display start date ^	Display end date ^	Review ^	Attachments ^	Review Status ^
Student, Miguel	913261221	AIP_DEMO_GROUP2	AIP_DEMO_ITEM2	NO	05/04/2023	I do not agree, too long to read	05/04/2023	07/27/2023	<input type="radio"/>		Review needed

AIP Live Demo – Review Action Item


- Status shows no
- Response is listed
- Review status is Review needed
- Select the eye icon under Review



AIP Live Demo – Review Action Item

[Monitor Action Item](#) • Action Item Review

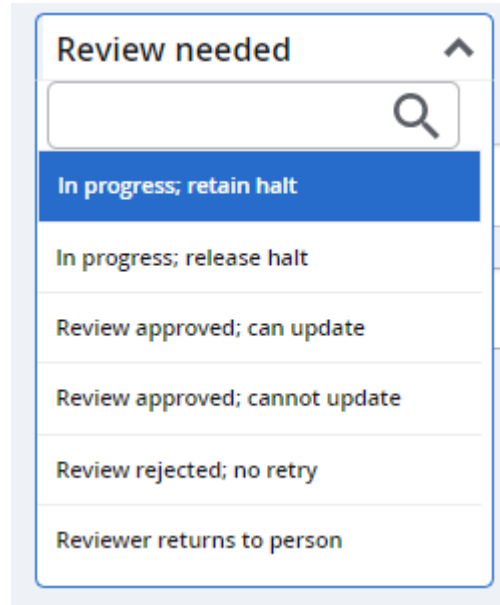
Action Item Review

Person ID	913261221
Person Name	Student, Miguel
Action Item	AIP_DEMO_ITEM2
Current Response	I do not agree, too long to read
Response Status	NO
Response date	05/04/2023
Display start date	05/04/2023
Display end date	07/27/2023
Number of attachments	0
Review Status	Review needed ▼
Comments	<input checked="" type="checkbox"/> External <input type="text"/>
Display end date	<input type="text" value="07/27/2023"/> 
Contact	select ▼



AIP Live Demo – Review Action Item

- Review status has multiple options and can either release the halt, allow update, or continue the block



A screenshot of a dropdown menu for review status. The menu is titled "Review needed" and contains a search bar with a magnifying glass icon. Below the search bar, there are seven options listed in a list view. The first option, "In progress; retain halt", is highlighted in blue. The other options are "In progress; release halt", "Review approved; can update", "Review approved; cannot update", "Review rejected; no retry", and "Reviewer returns to person".

Review Status Option
Review needed
In progress; retain halt
In progress; release halt
Review approved; can update
Review approved; cannot update
Review rejected; no retry
Reviewer returns to person



AIP Live Demo – Review Action Item

- Comments can be added if needed
- Contact email list from GUACONF

Review Status

Comments External

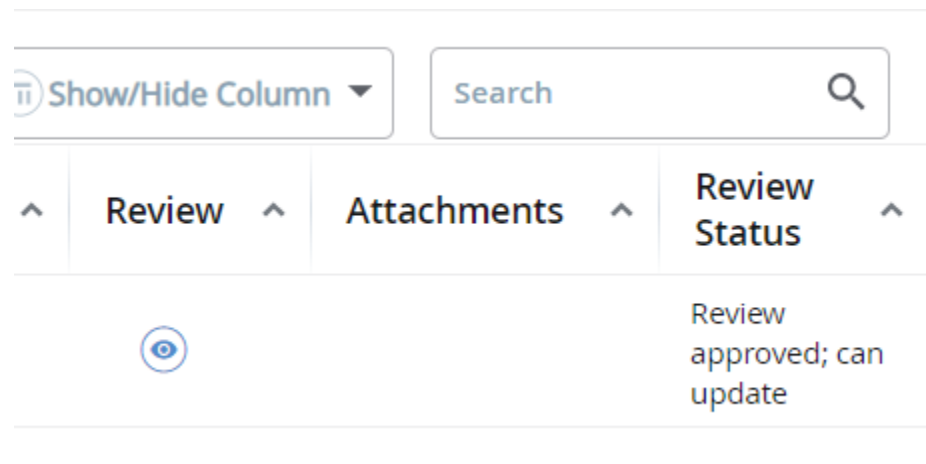
Display end date

Contact

- select
- miguel.morales@usg.edu
- jackie.lovejoy@usg.edu

AIP Live Demo – Review Action Item

- Review Status shows Reivew approved, can update
- User should now be able to update the result option



The screenshot shows a table with the following structure:

Show/Hide Column	Search		
^	Review ^	Attachments ^	Review Status ^
	⦿		Review approved; can update

AIP Live Demo – User Experience

- User is now able to update the result option to Agree

9. I am subject to and responsible for complying with all applicable *ITS University* and University System of Georgia policies and procedures.

10. This Agreement shall be governed by the laws of the State of Georgia without regard to choice of law provisions, and all actions arising under this Agreement will be filed and litigated in the courts within the State of Georgia.

I agree to all the terms and conditions above
 I do not agree, too long to read

Save

AIP Live Demo – User Experience

- Status will now show as Completed
- Continue should now allow to proceed to Registration

AIP DEMO Group Title - Financial Agreement

[Instructions](#)

End Date: 07/27/2023

Item Title: [Student Financial Responsibility Agreement](#) Completed

Response saved on: 05/04/2023

Current Response: I agree to all the terms and conditions above

Current Review Contact: miguel.morales@usg.edu

Current Review Comment: Please agree to the Financial Agreement

Halt Processes:
Register for Classes

AIP Live Demo – User Experience

[Student](#) • [Registration](#) • Select a Term

Select a Term

Terms Open for Registration

Select a term...

Continue



AIP Live Demo – Monitor Action Item

- Return to Monitor Action Item
- Status is now Completed and Response updated

Action Items

Name ^	ID ^	Group ^	Action Item ^	Status ^	Status date ^	Response ^
Student, Miguel	913261221	AIP_DEMO_GROUP2	AIP_DEMO_ITEM2	Completed	05/04/2023	I agree to all the terms and conditions above



Ask your peers

- Ask your peers
 - Helpful hints
 - Lessons learned
- Self-reported implementation status
 - Banner 9 Implementation Grid

Banner 9 Implementation

The [Banner Releases Summaries](#) page specifies the most current release information.

Fall 2022 Survey Results	Student	Financial Aid	Accounts Receivable	General	Student Registration	Faculty
Abraham Baldwin Agricultural College	Prod 9.20.1.1	Prod 9.3.31	Prod 9.3.22	Prod 9.11	Prod 9.25	Prod 9.18
Albany State University *	Not Implemented	Not Implemented	Not Implemented	Not Implemented	Test 9.21	Not Implemented
Atlanta Metropolitan State College	Prod 9.20.1.1	Prod 9.3.32.0.4	Not Implemented	Prod 9.11 (01/01 /2021)	Prod 9.25.1 (04/01 /2021)	Prod 9.18.1

Ask your peers

- If you have implemented...
 - Level and speed/ease of user acceptance (students, staff & faculty)
 - Share helpful hints or gotchas
 - Willing to share your plan
- If you have not implemented yet...
 - Plan or timeframe for testing, implementing, training
 - Concerns or hurdles

More training sessions coming soon

Topic	Date
Student Registration	Available on our Website
Page Builder	Available on our Website
Faculty Self-Service	Available on our Website
Accounts Receivable	Available on our Website
Communication Management	Available on our Website
Student Self-Service	Available on our Website
Action Item Processing	Wednesday, May 3, 2023
Proxy Management	Wednesday, May 17, 2023





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Information Technology Services