Implementing Self-Service 9x

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Agenda

1   Where we are today

2   Terminology

3   Shared Aspects of SSB 9x

4   Applications

5   Summary

Where we are today

Introduction

- **SSB9 is not just a lift and shift from SSB8**

- **New "concepts" in configuration mean that some of the config is technical and some of the config is functional and some of the config is still Web Tailor**

Banner 9 Self-Service Available Today

Student

- Class Roster
- View Grades
- Student Profile
- Advisor Student Profile
- Student Attendance Tracking View
- Student Card
- Drop Roster
- Financial Aid
- Student Aid
- Accounts Receivable

Registration

- Student Registration
- Class Schedule
- Course Catalog
- Registration Status
- Plan Ahead

Faculty

- Attendance Tracking
- Final and Midterm Grades
- Incomplete grades
- Electronic gradebook
- Student Academic Review

General

- Personal Information
- Direct Deposit
- Action Item Processing
- Communication Management
- Proxy Access – Proxy Experience
- Proxy Access – Student Experience

Finance

- My Finance
- My Requisitions
- My Finance Query
- My Journals

Human Resources

- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution
- Time Entry & Leave Management

Banner 9 Self-Service Available—Next 12 Months

Student

- Class Roster
- View Grades
- Student Profile
- Advisor Student Profile
- Student Attendance Tracking View
- Student Card
- Drop Roster
- Financial Aid
- Student Aid
- Accounts Receivable
- **Degree Evaluation**
- **Enrollment Verification**
- **Graduation Application**
- **Transcript Request**

Registration

- Student Registration
- Class Schedule
- Course Catalog
- Registration Status
- Plan Ahead

Faculty

- Attendance Tracking
- Final and Midterm Grades
- Incomplete grades
- Electronic gradebook
- Student Academic Review
- **Schedule View**
- **Faculty Feedback**

General

- Personal Information
- Direct Deposit
- Action Item Processing
- Communication Management
- Proxy Access – Proxy Experience
- Proxy Access – Student Experience

Finance

- My Finance
- My Requisitions
- My Finance Query
- My Journals
- **My Approvals**
- **My Budget**
- **My Purchase Orders**

Human Resources

- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution
- Time Entry & Leave Management
- **Personnel Actions**
- **Benefits Administration**
- **Salary Planner**
- **Faculty Load and Compensation**
- **Regulatory Tax Pages**
- **Campus Directory**

Terminology

Terminology

Consolidated Application – single deployable war file that contains modules

Faculty SSB has Faculty Grade Entry, Class Lists, Attendance Tracking, Drop Rosters, and Advising Profile

WAR file – technical file that houses critical config items that frequently require a Tomcat Restart to take effect

Each Application has its own WAR file including Application Navigator

Properties File – an application might have multiple properties files which controls labels and individual elements that display in the components of that application (including message files)

Role/Persona – near identical to Web Tailor Roles – used in WAR file and Property files to control which user sees what pieces

Shared Aspects of SSB 9x

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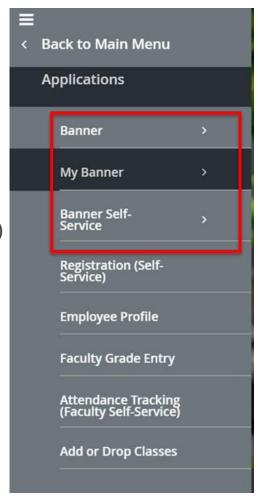
SSB8 and SSB9 playing together

You can use Application Navigator to have a seamless experience between Banner 8 and Banner 9 running concurrently.

- Application Navigator is required to deploy Banner 9.x Administrative Applications.

- Application Navigator requires Single Sign On to be configured via EIS Ethos Identity Server or a CAS server.

- Banner 9.x applications supports Single Sign On natively but Banner INB does not. For Application Navigator to seamlessly move between Banner 9.x Admin pages and Banner 8 INB, Single Sign On to Banner 8 must be in place.

- Single Sign On to Banner 8 requires SSO Manager as a gateway into INB and SSB.

Getting to SSB

The Banner, My Banner, and Banner Self Service menus are part of the App Nav install settings

- Banner Menu tree is controlled by Menu Maintenance page (GUTGMNU)

- My Banner is controlled by My Banner Maintenance (GUAPMNU) page and can be copied to other users via My Banner Maintenance and Copy (GUTPMNU) page

- Banner Self Service Menu Tree is the Web Tailor menu items

- Any additional links can be configured on General User Preferences Maintenance (GUAUPRF) "My Links" tab or the App Nav properties file

- Banner Self-Service: set the "ssbEnabled" parameter to true in Application Navigator Groovy file.
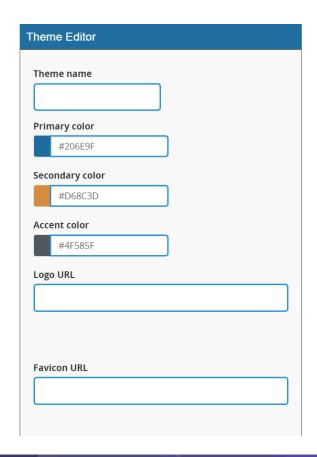

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< **Back to Main Menu**

Applications

Banner >

My Banner >

Banner Self-Service >

Registration (Self-Service)

Employee Profile

Faculty Grade Entry

Attendance Tracking (Faculty Self-Service)
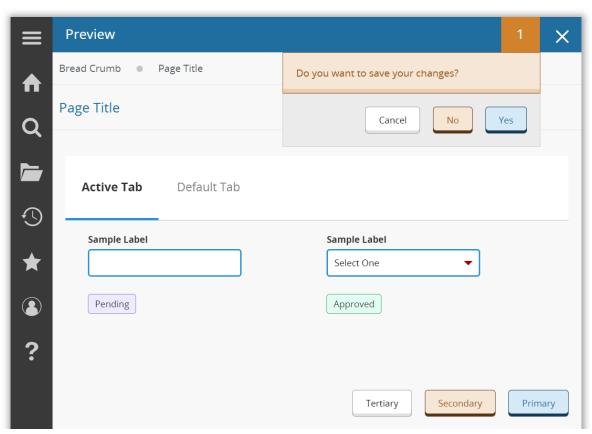
Add or Drop Classes

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Theme Editor

"Replaces" stylesheets and controls color schemes

Incorporate School Logo into theme

- Each application needs to be associated to a Theme (in the WAR file)

- Strongly recommend creating themes for each environment

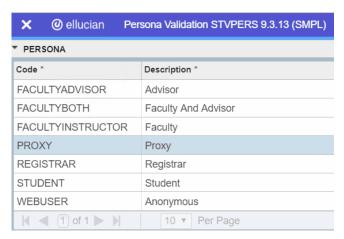- PROD = School Colors

- TEST = "green" colors

Theme Editor

Roles/Persona

Persona Validation STVPERS 9.3.13 (SMPL)	
PERSONA	
Code *	**Description ***
FACULTYADVISOR	Advisor
FACULTYBOTH	Faculty And Advisor
FACULTYINSTRUCTOR	Faculty
PROXY	Proxy
REGISTRAR	Registrar
STUDENT	Student
WEBUSER	Anonymous

Near Identical to WebTailor Roles

Used to control how text shows to an SSB User

- Can be Used in WAR and Property Files
  - Student Profile can show different links to different Roles/Persona
- Registration related pages are controlled using Overall Page and Field Configuration (SOAWSCR)
- Determine which fields will display on any given Registration page by Persona and term effective logic
- Display text to different Personas differently

Info Text

In SSB8, Info Text was controlled per WebTailor info text per page
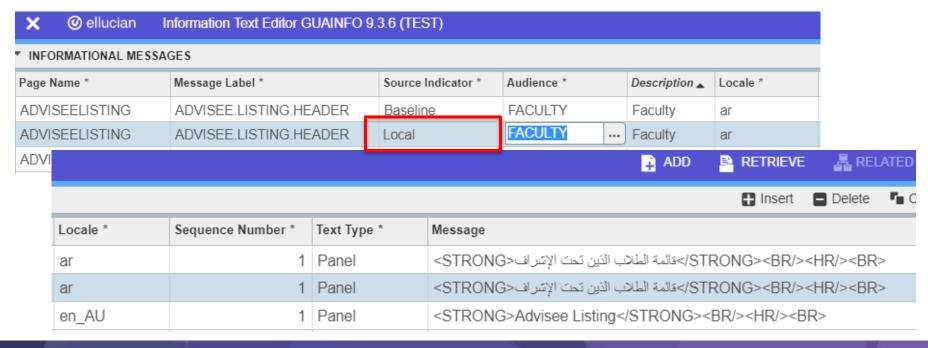
- Since there were different versions of pages for Faculty/Advisor and Student, who could sort of control what text showed for which population

In SSB9, most info text and "error messages" can be controlled via Information Text Editor (GUAINFO) page

- Text can be edited in any of the supported languages

- Just like WebTailor, you Copy the existing baseline text, thus making a Local Copy, which you then edit (use Ctrl E in Message field to open a window to make it easier to edit the whole message)

- You can make text unique to any TWTVROLE role, not just Persona

- Some messages are only in Message Property files – but we are working on that

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Information Text Editor (GUAINFO)

Also has text for Ethnic/Race Survey and Terms of Usage acceptance pages (oddly, does not have Veteran Status or Disability Survey)
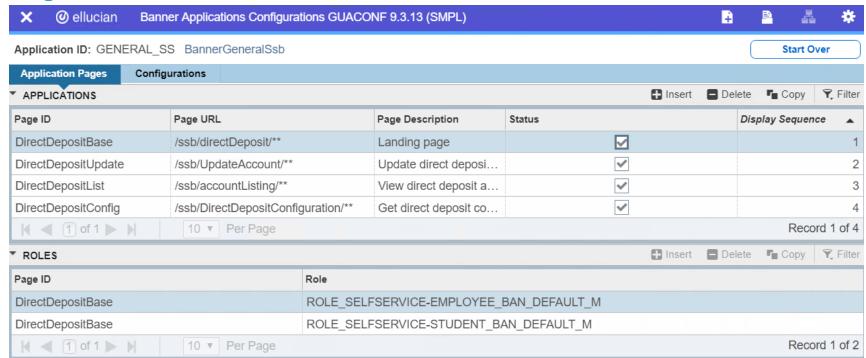
Common Landing Pages

In SSB8, General menu was HOME and everyone started at home

SSB9 is sort of Homeless. Instead there are Common Landing pages for each Module
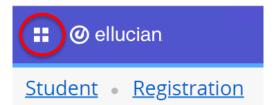
- General Person
- Student including Financial Aid
- Faculty
- Employee
- Finance
- Registration

Banner Applications Configurations (GUACONF)

Holds configurations and does not require redeployment of the application when changes are made

SSB Menu

In SSB8, controlled per Web Tailor Menu Items

- Two options to hide menu links – remove the link from the menu OR disable the package completely and it's corresponding links would not show

In SSB9, controlled per Web Tailor Menu Items

- HOWEVER, SSB9 only goes by menu links and doesn't reference enabled/disabled packages.

- You will want to add the SSB9 packages to your existing menu tree using WebTailor. Potential recommendation to resort the menu so the SSB9 pieces are on the top.

Photos

The following image file formats are supported: - .gif - .bmp - .jpg - .png

The preferred standard for images is a .jpg file.

The No Photo Available image is a .png file due to the art used in the graphic.

- Remember to maintain a square aspect ratio for all images.

- Establish a maximum resolution of 200 pixels by 200 pixels.

In Banner, it is possible for student IDs to begin with numbers. However, some file systems require that files begin with a letter instead of a number.

To ensure that a student's photograph can be displayed on all systems, it is required that all student picture file names that start with a letter use the character I as the starting character.

we support removing the first two characters of a student ID, as long as the ID has five or more characters

For a student with the student ID of S12345678, the photograph for the student may use any of the following file names:

- - IS12345678.jpg, - SI12345678.jpg, - I2345678.jpg, - IS12345678.png, - SI12345678.png, - I2345678.png, - IS12345678.gif, - SI12345678.gif, - I2345678.gif, - IS12345678.bmp, - , I12345678.bmp, - I2345678.bmp

Applications

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Student Self-Service

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Student Self-Service

Overall Page and Field Configuration (SOAWSCR) – SSB9 Registration only

Overall Page and Field Configuration SOAWSCR 9.3.13 (SMPL)

ADD   RETRIEV

Persona: STUDENT   Student   **Page:** 10   Class Search Basic   **Effective Term:** 000000   The Beginning of Time   **End Term:**   999999

Copy From Persona: **Copy From Term:**

▼ OVERALL PAGE AND FIELD CONFIGURATION   Insert

Display Number	Field *	Field Description	Displayed	Baseline Display Text	Custom Display Text	Required
1	subject	Subject	☑	Subject		☐
2	courseNu…	Course Number	☑	Course Number		☐
5	keywordlike	Keyword (Partial Words)	☑	Keyword (Partial Words)	Keyword (Partial Words)	☐
10	attribute	Attributes	☑	Attributes		☐
20	courseTitle	Title	☑	Title		☐
30	instructor	Instructors	☑	Instructors		☐
35	partOfTerm	Part Of Term	☑	Part Of Term		☐
	building	Buildings	☐	Buildings		☐
	courseNu…	Course Number Range	☐	Course Number Range		☐
	creditHour…	Credit Hour Range	☐	Credit Hour Range		☐

Student Profile – Persona Access

In SSB8, Faculty/Advisor roles were determined "on the fly" when the user first accessed a page in SSB.

- If they accessed a Class Roster page first, they were flagged as a Faculty and that followed them through their session

- If they accessed an Advisor Listing, they were flagged as Advisor

- Hence the need for the Process Control Code Validation (STVPROC) Check Order and Enforce Check Order

In SSB9, it's "simplified" in that it goes straight off the SIAINST checkboxes

- You are either Faculty, Advisor, Faculty and Advisor, or Faculty Override

- Text and fields/links can be controlled for each of those "Persona"

- Advisor Notes controls are delivered enabled for the Override role and must be configured for other Persona (including Student) in the WAR or Property files for Notes

Faculty Pages – additional items to think about

ID Cards are based on Directory Options Rules (GOADIRO) configuration

SSB Faculty Advisor Security should be reviewed

- Process Control Codes (STVRPOC)

- Faculty / Advisor Process Rules (SOAFACS)

- Faculty Attribute / Advisor Type Control (SOAFAPC)

Crosswalk Validation (GTVSDAX) settings

- Every Faculty SSB piece has GTVSDAX components. Best to review the Faculty Self Service Handbook

GUACONF configurations

- Display Midterms

- Academic Review

Student Profile – additional items to think about

Notes must be configured in the properties file per Persona

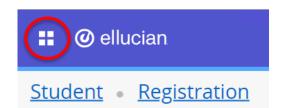- Student Note Category Validation (STVNTCG) and Student Note Interaction Type Validation (STVNTIN)

Student Term code selection controlled on GORRSQL

- Process = STUDENT_PROFILE
  Rule = STUDENT_PROFILE_DEFAULT_TERM

Editing Links in the configurations.properties file

- Student Advisor for additional links:

  - You MUST maintain the sequential order. Removing a sequence means all other later links must be renumbered. Must NOT skip a sequence number

5 Additional Things to Review

Student · Registration

Landing Page on GUAINFO

4 Square = WebTailor Menu

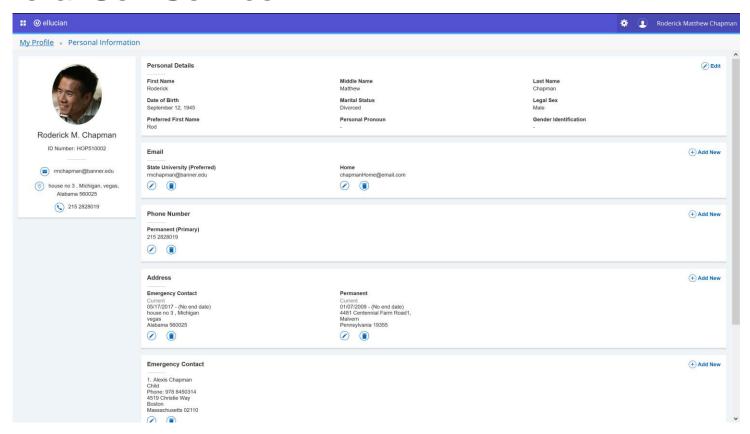**Student Profile Term Drop Down based on GORRSQL**

Advising Profile Links configured in Properties file and must be in sequential order. Removing a sequence means all other later links must be renumbered. Must NOT skip a sequence number.

Links repeated per PERSONA (called ROLE in technical file)

General Self-Service

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General Self-Service

General Pages – additional tricky things

Integration Configuration Settings (GORICCR)

- ENABLE.DIRECT.DEPOSIT - Controls whether the Direct Deposit page will show in SSB on General Person

- PERSONAL INFORMATION SSB

- ENABLE.PASSWORD.CHANGE –Y or N

- ENABLE.SECURITY.QA.CHANGE – Y or N

Can also have links to the Ethnicity Survey, Military Survey, and Disability Survey

Business Rules (GORRSQL)
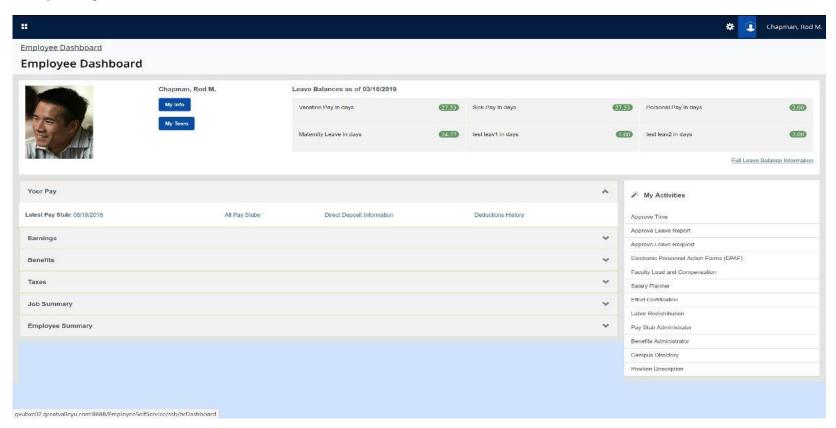
GUACONF

- Payment Vendor settings

- AIP

Employee Self-Service

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Employee Self-Service Configurations

- **Installation Rules (PTRINST)**

  o "Self Service" Tab

- **Web Based Pay Stub Rules (PTRWSTB)**

- **Banner Applications Configuration (GUACONF)**

- **Text Manager Interactive Translator (GMATRAN)**

- **Name Display Rules (GUANDSP)**

- **Address Role Privileges (GOADDRL)**

- **General Crosswalk Validation (GTVSDAX)**

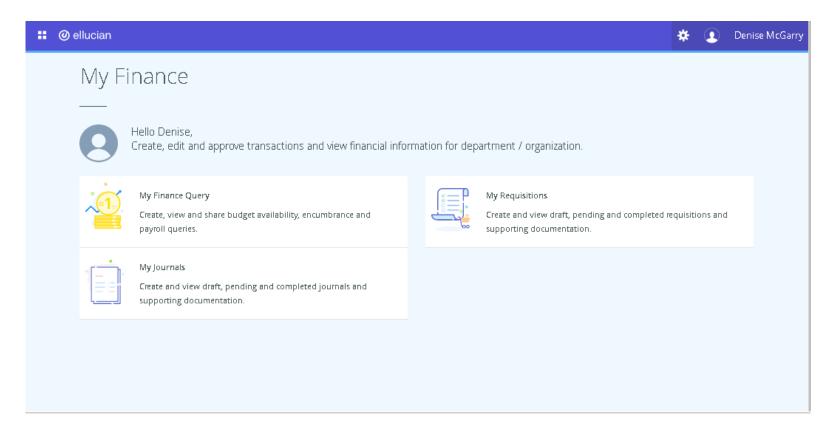- **Mass Update (NBPMASS)**

Employee Dashboard

Finance Self-Service

Finance Self-Service Configurations

- **Banner Applications Configuration (GUACONF)**

  - Vendor Addresses

  - Available colors and percentages

  - Banner Document Management controls

- **Text Manager Interactive Translator (GMATRAN)**

- **Name Display Rules (GUANDSP)**

Finance Dashboard

Summary

Implementing Self-Service 9x you have options

GUACONF has majority of the configurations for all applications

Some applications have additional configurations in other pages

March 2020 All SSB 8x baseline applications will be converted

Installation Guides

Each application has an installation guide:

Employee Self-Service Installation Guide Sept 2019

Banner_Faculty_Self_Service_Installation_Guide_9.9_September_2019

Banner_Finance_Self_Service_Installation_Guide_9.2.1_September_2019

Banner_General_Self_Service_Installation_Guide_9.4_Sept_2019

Banner_Student_Self_Service_Installation_Guide_9.10_September_2019

Banner_Student_Self_Service_Registration_Installation_Guide_9.15_September_2019

Handbooks

Each application has an handbook with configurations checklists:

Banner_Employee_Profile_Handbook_9.9_Sept_2019

Banner_Faculty_Self_Service_Handbook_9.9_September_2019

Banner_Finance_Self_Service_Handbook_9.2.1_September_2019

Banner_General_Self_Service_Handbook_9.4_Sept_2019

Banner_Student_Self-Service_Registration_Handbook_9.15_September_2019

Banner_Student_Self-Service_Handbook_9.10_September_2019

Thank you.

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