

# Sungard National Summit 2009 Highlights

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## ***Banner Student Roadmap Session***

- Banner Roadmap Strategy
  - Consistent, streamlined & personalized user experiences
  - Create more agile and robust Banner
  - Banner 9 will NOT be delivered in the first half of 2010
    - Deliver 9.x value-added enhancements as part of Banner 8.x
  - Using Adobe Flex, update Student Self-Service user interface (UI):
    - Enrolled student registration process will include the "shopping cart" concept.
    - No additional cost to campus
    - Targeted release for Fall 2009

## ***Banner General Product Update Session***

- General 8.0 included the following:
  - Several enhancements to improve PIN security
    - New Distributed Security form (GSADSEC) that allows you to assign limited security administration privileges to users
    - Security Auditing:
      - New Banner Security Table Audit Form (GSAAUDT) provides access to security audit records
      - New GURLOGN table saves log with information on every Banner logon
  - Partial Character Masking
    - Added the ability to partially mask character fields

- Supplemental Data Engine –
  - Add data fields to Banner forms
- Support of Unicode international character set through standard UTF8.
- Banner 8.2 (future release) will include the following:
  - Globalization enhancements
  - Regulators release support
    - Credit Card Compliance Changes - FAQ #1-5203SH
  - New Banner form (GUIVERS) that will display installed patches and upgrades
  - Support mixed case passwords in Oracle 11G
  - New version of web utility

## ***Highlights on Degree Works 4.0 Session***

- Enhanced web-based look and feel
- Financial Aid Eligibility Requirements
- CPA Report Model using Oracle BI Discoverer
- Multi-Entity Processing
  - Multiple Institutions can share a database
  - Each Institution has their own “schema”
- Enhancements to Security
  - Access code (password) size increased to 64
- Preparation for Internationalization
  - Database fields were re-sized to handle larger character strings, mostly name and address field changes

- Portal Changes for Banner
  - Support for Self-Service Banner Single Sign-On
  - Support for Luminis Single Sign-On
- WebTreQer
- Support for Banner WorkFlow
- General Enhancement include the following:
  - UCX Re-structure
  - PC Applications
  - Web Interface
  - Bridge
  - System
  - Native Integrated Interface for Banner

## ***Banner 8 Graduation Application and Manual Roll Session***

- Released in Student 8.0
- New Self-Service Graduation Application functionality allows users to create and update degree information in academic history via the web.
- Institution will define who is eligible to submit an application based on existing outcome or learner curriculum record.
- Manual Roll on demand using an icon on the Curriculum Tab on SFAREGS and SGASTDN
- New Roll Learner to Outcome Process (SHRROUT) process to roll learner curriculum records to the outcome curriculum and then insert new degree sequence records.

## ***Banner 8 Incomplete Grade Session***

- Released in Student 8.0
- Allows instructors to submit an Incomplete grade, a default grade and an extension deadline for a student
- A new Incomplete Grade Process (SHRCINC) to update incomplete grades to final grades
- Updated the Grade Roll to Academic History (SHRROLL) process to roll incomplete final grade and the extension date from the class roster to history
- Updated the self-service grade lookup page to display the default, incomplete, final (replacement) grade, the expiration date and a associated comment field

## ***Banner Financial Aid V8 Kick Off***

- Reminders:
  - Support for Banner 7 will end on September 1, 2010.
  - The last Financial Aid release will be August 2010 – which is the Summer Regs release
- Banner 8 New Functionality includes:
  - Algorithmic Packaging
  - US v/s Non - US functionality
    - New fields on the ROAINST form
  - Scholarship & Athletics functionality
  - ROASTAT API – will be released in 8.1
  - Term Based Holds
  - Applicant Hold API's
  - 63 new RPE's
  - Term Based Processing and BBAY
  - Can create budgets, packaging, and tracking groups by term

- Accept and decline awards by term
  - Functionality also in Self Service
- Print term based award letters

## ***Banner Algorithmic Packaging***

What is it?

- A set of rules above and beyond rules setup in RORRULE.
- RORRULE says who gets it whereas Algorithmic packaging states how much they should get
- Working with someone who is familiar with sql writing maybe needed to ensure you are getting the desired results.

## ***Priority Codes – Beyond 000 & 999***

Series of 3 numbers that controls the:

- Order in which charges are paid.
- Order in which payments are used.
- What charges are paid by what payments

Payment Detail Code

- Detail code with the highest priority number will be used first.
  - e.g 999 will be paid first

Charge Detail Code

- Detail code with the highest priority number will be paid first.

Zeros are considered wildcards.

Matching by Columns

- Payment 900 pays 900 – 999
- Payment 800 pays 800 – 899

- Payment 901 will pay 901, 911, 921, 931, 941, 951, 961, 971, etc.

#### Common Mistakes

- Straight Ordering of Charges
- Straight Ordering of Payments

To prevent mistakes, need to order charges without placing a specific number to them first. Order your payments and then decide what they should pay

### ***How to SCRUM YOUR PIA – Recommendations***

- Business Improvements that lead to IT Improvements
- SCRUM is agile software development
- PIA is Process Improvement Assessment
- Why do this?
  - To get more of EVERYTHING!
  - Great for Implementation of a new Banner product or upgrade
  - Reduces the number of customization or MODS.

### ***Application and Unapplication of Payments***

#### Application of Payments:

- Payments are applied to charges
- Balances of payment transactions are reduced
- Balances of charge transaction are reduced

- TGRAPPL – Batch Job
  - Reviews all accounts
  - Use population selection
  - Runs on-line for a single account
- TSIAPPL – displays the transaction combinations
- Application of Payment – why run it?
  - To reduce the balance on charges, to see what is outstanding.
  - To reduce receivable in GL
  - To see what is paid and what is past due
- How often?
  - Daily
  - When working on an account.

#### Unapplication of Payments:

- Breaks apart application of payment
- Brings balance back to transactions
- Re-sets “Reapply” flag
- Use TGRUNAP – in batch
  - Reviews all accounts
  - Use in pop sels
- Use TSAUNAP – for online
  - To clean up accounts
  - Use later payments to cover charges
  - Change the way application of payment was applied

- Run Unapplication of payments as needed by student or in batch. Run it in conjunction with TGRAPPL.
  - Run daily, monthly or weekly.

## ***Financial Aid Self Service***

### Resources

- RTVARSC allows you to define outside resources and what to display on FA Self Service
- RPPARSC allows you to change a student's specific resources to not display on FA Self Service

### Basic Messages

- RTVMESG allows you to build messages on indicate which messages should display
- All non-coded student messages on ROAMESG form will display – unless the message has expired.

RPRLNDR – Lender Based Data Form – allows you to maintain lender information and indicate if this lender should display on FA Self Service

- When a lender is selected via FA Self Service, it will automatically update lender in Banner on RPASLND.

### Award Acceptance

- Students can accept aid that is in the offered status only.
  - Funds that are auto-accepted or already accepted cannot be updated by the student via FA Self Service
- Award Acceptance is not allowed on locked funds or awards.
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## Satisfying Award Letter Tracking Requirements

- Web Accept Tracking rules on ROAINST allows you to specify tracking requirements
- Tracking requirement must exist on RRAAREQ in order to use the functionality!
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## Award Letter

- Students can print and display their award letter online.
  - Can print from the Award Overview tab of the Accept Award Offer tab
- Can define question text and characteristics and rules to follow via RORWBQA form.

## Choosing a Lender Online

- Lender info stored in RPASLND
- RFRMGMT allows you to indicate loan funds if lender can be chosen online for fund.
- NOTE: Students will only be given the Choose Lender Option if they currently do not have an active lender in history (RPASLND).

## ***What's New in Banner Document Management***

- New testing center and increased testing rigor
- BDMS 8.0 will include:
  - Financial Aid Algorithmic Packaging
  - International Data
  - Field Expansion
  - UTF-8
- SGHE is now offering Enterprise Licenses
- Unlimited concurrent users
- Pricing based on FTE
- EMC desupport June 2009

- Workflow for BDMS integration
  - Requires no upgrades or license fees as long as campus on a current supported releases of BDMS and Workflow
- Evisions FormFusion Integration
  - Reduces total license cost and implementation effort
- What's Next
  - EMC Documentum
  - Share Point Integration
  - Automated document process
  - Embedding BDMS services across UDC

## ***Banner UDC Evolution***

- Banner 8 is live at Savannah College of Art and Design
- 7.x desupport date is 9/1/2010
- "Continue to evolve to relationship excellence along with transactional excellence"
- Flex based User Interface
- Banner 9.0 will be at a time when underlying architecture change is required in the future
- Shopping Cart metaphor
  - Via upgrade
  - No additional cost
  - Will be available later this year
- Flexible Registration
  - Add on product
  - For use with Continuing Education, business and industry education AND degree and non-degree programs
- Non-term based
  - Includes functionality for discounts, invoices and planning tools
- No cost to clients for Adobe Flex tool
- Enrollment Management product developed using Flex tool, tab metaphor

## ***Flexible Registration***

- Add on Banner module
- Later this year Flex Reg will be enhanced for degree seeking students
- Modern with eCommerce design model
- Integrates easily with public web sites

- Catalogs:
  - What sections do you want to expose
  - Searching
  - Admissions
  - Registration
  - Discounts – multi-course, age, etc. Flat or % coupon (marketing)
  - Payments
  - Invoices
- Version 1.1 released at end of March
  - Uses Common Matching
  - Functionality for “Optional Materials” ie, purchase scuba gear online for diving course
- Version 3.0
  - Ability to create a “Planning Schedule”
    - Drag & drop to e-scratch pad
    - Shows haul between building locations on GoogleMap
    - Can save multiple plans
- “Contact your Account Manager for pricing and other questions”
- Does not enforce lecture/lab or recognize any restrictions other than class is full (ie prereq, coreq)