Train the Trainer:
Implementing Student Self-Service Banner for Accounts Receivable 9x
March 2023
• When should you implement 9.x SSB?
• How to get help?
• Where is the documentation?
• What’s new or different?
• Live Demos (Functional Users Updates and Review of Student Self Service)
• Ask your peers
• More training sessions coming soon
When should you implement 9.x SSB?

• Do it now!
• All 8.x SSB entered Maintenance Support until March 2024
  – Continue to receive regulatory and severity 1 change request updates, including security fixes
• Ellucian to announce Sustaining Support
When should you implement 9.x SSB?

**Summary of Support Statutes**

<table>
<thead>
<tr>
<th>Type of Support</th>
<th>Active</th>
<th>Maintenance</th>
<th>Sustaining</th>
<th>End of Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to submit software enhancement requests or ‘ideas’ for the next version</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to add a low severity change request</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional enhancements to the product are released</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New releases and related documentation</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New hot fixes or updates for severity 1 issues</td>
<td>•</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regulatory updates</td>
<td>•</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support from Cloud technical resources and Action Line analysts via the Ellucian Support Center, email or phone</td>
<td>•</td>
<td>•</td>
<td>•</td>
<td></td>
</tr>
<tr>
<td>Access to previously supplied hot fixes and regulatory updates</td>
<td>•</td>
<td>•</td>
<td>•</td>
<td></td>
</tr>
<tr>
<td>Full access to online content such as knowledge base articles, product documentation, eCommunities forums, and product downloads</td>
<td>•</td>
<td>•</td>
<td>•</td>
<td></td>
</tr>
</tbody>
</table>

- **Ellucian Article 000041256** - What is the support status of Self Service Banner 8.x (SSB 8.x)?
- **Ellucian Article 000038478** - Ellucian Support Assurance – Support status table
- **Ellucian Article 000050967** - What is the support status and future of Self Service Banner 8.x Admissions?
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
How to get help?

• ITS Helpdesk ticket for GeorgiaBEST team
  – 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**

Banner 9

**What is Banner 9?**

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.
Where is the documentation?

• Need an Ellucian Customer Center account?
  – [https://login.ellucian.com/](https://login.ellucian.com/)
  – Click “Sign up for an account”

• [Ellucian Customer Center](https://login.ellucian.com/) > Resources > Documentation > All Products to access Ellucian Documentation, then use Product A-Z to filter for Banner

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**Download these!**
Click here to go to the Adoption Channel

Introducing Banner Financial Aid and Accounts Receivable Self-Service
60 minute video

Banner 9 Self-Service Frequently Asked Questions and Answers
13 page pdf containing basic FAQs

Implementing Your First Banner Self-Service Application
45 slide presentation pdf (2021 Ellucian Live)

Registration Self-Service Basic Install & Configure Steps (Part A)
6 page pdf (Theme Editor, photos, name display rules, menu trees)

Web Tailor Functions in Banner Self-Service 9 Channel
9 video demos
## Web Tailor Functions in Banner Self-Service 9 Channel

### Banner 8 Web Tailor Functions in Self-Service Banner 9

<table>
<thead>
<tr>
<th>What?</th>
<th>Where?</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Audit for Banner Self-Service Logins</td>
<td>GUACONF</td>
<td>Video</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Article</td>
</tr>
<tr>
<td>Graphic Customizations</td>
<td>Theme Editor</td>
<td>Video</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Article</td>
</tr>
<tr>
<td>Information Text</td>
<td>GUAINFO</td>
<td>Video</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Documentation</td>
</tr>
<tr>
<td>User Roles</td>
<td>GUAUSRL</td>
<td>Video</td>
</tr>
<tr>
<td>Web Menus and Procedures</td>
<td>GUASMNU</td>
<td>Video</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Article</td>
</tr>
<tr>
<td>Web Rules and Parameters</td>
<td>GUACONF</td>
<td>Video</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Article</td>
</tr>
<tr>
<td>Web Tailor Overrides</td>
<td>Configure Page Components Tool</td>
<td>Documentation</td>
</tr>
</tbody>
</table>
Where is the documentation?

KB000500907 - Banner Accounts Receivable Self-Service Master Article

Banner Accounts Receivable Self-Service Master Article
5mo ago • 123 Views • ⭐️⭐️⭐️⭐️

Description

Banner Accounts Receivable Self-Service pages are delivered through Banner Student Self-Service. Any configuration information can be found in the Banner Student Self-Service Configure document for 9x.

This article provides a link to any articles related to the Accounts Receivable Self-service pages, configuration, and functionality.
Where is the documentation?

Ellucian Articles related to Banner 9x Self-Service

- **000043866** - Banner 9 Steps to Modify the Banner 9 Self Service Landing Page Dashboard to include URLS
- **000045859** - How can we access the Accounts Receivable Self Service pages
- **000045994** - How to configure the Banner Menu to have Banner 9 Self Service applications and not Banner 8 SSB menus
- **000051530** - Steps to amend the “Note” label ‘This is an unofficial copy of the form 1098-T and is provided for information only’ from the Tax Notification presented in Student Self Service
- **000046034** - Banner 9 Self Service Product Links (fully qualified url)
- **KB000500383** - Banner Self-Service 8 (SSB8x) to 9 (SSB9x) FAQ
- **000041225** - Student Self-Service 9.x links
- **KB000500749** - SSB9x Platform 9.39 June 2022 changes to config values for configJob and applicationPageRoleJob impacting GUACONF
- **000034220** – Set up Deposit and Fee Payments in Self-Service
- **000039922** - Steps to modify SSB links after installing Banner 9 Student Self Service
Where is the documentation?

- **KB000500608** – Banner 9 Web Tailor tables – What happens to the Web Tailor Tables with functionality moving to Banner 9 forms?
- **000051317** – Banner 9 Self-Service Guided Adoption
## What’s new or different?

<table>
<thead>
<tr>
<th>Banner 8x</th>
<th>Banner 9x</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select term prior to viewing 1098-T</td>
<td>Terms are pre-populated for 1098-T</td>
</tr>
<tr>
<td>No printer icon</td>
<td>Printer icon</td>
</tr>
<tr>
<td>No column sorting</td>
<td>Column sorting</td>
</tr>
<tr>
<td>No show/hide option for columns</td>
<td>Show/hide options for columns</td>
</tr>
<tr>
<td>No search option</td>
<td>Search option</td>
</tr>
<tr>
<td>No display of student holds</td>
<td>Student holds displayed on SSB pages</td>
</tr>
<tr>
<td>Columns could not be moved</td>
<td>Columns can be moved</td>
</tr>
</tbody>
</table>
Functional User Updates

• Detail Code Control Form (TSADETC)
  – Update Payment History check box on detail codes for payments

• Accounts Receivable and Billing Control (TGACTRL)
  – Update the Statement and Payment History Months

• Accounts Receivable Term Control (TSATERM)
  – Enable terms to work with Pay Now buttons and other functions

• Object Maintenance (GUAOBJS)
  – Enable exporting data to Excel for Banner pages
  – Search for GUAINFO
  – Go Tools Menu on the page and Export
Live Demo
Functional User Updates

Detail Code Control Form (TSADETC)

• Update Payment History check box for payments
Functional User Updates

Accounts Receivable and Billing Control (TGACTRL)
- Update Statement History Months
  - Default value set to 3 months
- Update Payment History Months
  - Default value set to 3 months
Functional User Updates

Accounts Receivable Term Control (TSATERM)

- Choose the term and click Go
- Enable Term
- Enable Pay Now buttons
- Summarize by Detail Code
- Show Account Detail totals for
  - Account Balance only
  - Balance and Current Due
- Include Display of
  - Authorized Aid
  - Aid Memos
  - Other Memos
- Show Totals for
  - No calculated amounts
  - Adjust Balance only
  - Both Adjusted Balance and Current Due
Accounts Receivable Term Control (TSATERM)
Functional User Updates

• **Information Text Editor (GUAINFO)**
  - No refresh timing delay for updated information messages
  - Use the Tools Menu to export messages to Excel for review once enabled on GUAOJBS
  - Exporting data--filter by the Source Indicator
    - B = Banner Baseline (Delivered messages)
    - L = Local (Local School Message Changes)
    - Update blue information text
  - STUDENTLANDINGPAGE
  - Create headers and naming for each item below the header
  - AR%
  - Create information text and ‘Note’ Label text on 1098-T’s

• **Banner Applications Configuration (GUACONF)**
  - Refresh timing delay = 30 minutes past the hour
  - Application ID = SSS
Information Text Editor (GUAINFO)
Page Name: AR_TAXNOTIFICATIONPAGE

- Message Label
  - ‘STATUSREADY’ Message starts with ‘Green’
  - ‘UNOFFICIALINFOMESSAGE’ starts with ‘Unofficial Copy’
Student Tax Notification (TSATAXN)

**TSATAXN**
- Status Ready to Send

**GUAINFO**
- AR_TAXNOTIFICATIONPAGE
- Message Label
  - STATUSREADY
Banner Applications Configuration (GUACONF) for 1098-T’s

Application ID = SSS
Application Name = StudentSelfService
Banner Applications Configuration (GUACONF) for 1098-T’s

- Click on the Configurations tab
- Choose the Configuration Name
- Update the Configuration Value
  - Watermark can be toggled between True or False
    - If the watermark is disabled with False as the ‘Configuration Value’ in GUACONF, it is not printed in the PDF in Self-Service
    - Changes may take from 30 minutes to one hour or more to appear in Self-Service

<table>
<thead>
<tr>
<th>Configuration Name</th>
<th>Configuration Type</th>
<th>Configuration Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>banner.student.accounts.receivable.tax.notification.displayUnofficialCopyWatermark</td>
<td>Boolean</td>
<td>True/False</td>
</tr>
</tbody>
</table>

Note: “The 1098-T form in Banner Self-Service is not an official copy approved by the IRS and is not a valid substitute for the printed 1098-T form. It is a representation of the IRS form.”
Banner Applications Configuration (GUACONF) for 1098-T’s

What is the difference for the Unofficial Copy Watermark between true and false?
Banner Applications Configuration (GUACONF) for the Pay Now button in SSB

Application ID = GENERAL_SS
Application Name = General SSB App

• Filter for %banner%pay% on the Configurations Tab
  – Using SSO (CAS or SAML2) with vendors (Touchnet/Cashnet)
    • Update the Configuration Values
      – banner.nonpci.payment.gateway.url = vendor URL
      – banner.payment.vendor = Touchnet/Cashnet
  – NOT using SSO (CAS or SAML2) with vendors (Touchnet/Cashnet)
    • Update the Configuration Values
      – banner_pci.payment.gateway.url = vendor URL
      – banner.payment.vendor = Touchnet/Cashnet
Banner Applications Configuration (GUACONF) for the Pay Now button in SSB

Application ID = GENERAL_SS
Application Name = General SSB App
• Filter for %banner%pay% on the Configurations Tab
Application ID = SSS
Application Name = StudentSelfService

- Filter for %pci% on the Configurations Tab
  - If using SSO (CAS or SAML2) with vendors (Touchnet/Cashnet)
    - Update the Configuration Values
      - Set all: nonpci values to the vendor URL
      - Set all: pci values to false
Banner Applications Configuration (GUACONF) for the Pay Now button in SSB page level

Application ID = SSS
Application Name = StudentSelfService
- Filter for %pci% on the Configurations Tab

<table>
<thead>
<tr>
<th>Configuration Name</th>
<th>Configuration Type</th>
<th>Configuration Value</th>
<th>User Preference Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>banner.nonpci.payment.gateway.accountInformation.url</td>
<td>string</td>
<td>Update the URL of payment vendor Touchnet/Cashnet</td>
<td>false</td>
</tr>
<tr>
<td>banner.nonpci.payment.gateway.accountSummary.url</td>
<td>string</td>
<td>Update the URL of payment vendor Touchnet/Cashnet</td>
<td>false</td>
</tr>
<tr>
<td>banner.nonpci.payment.gateway.enrollmentVerificationRequest.url</td>
<td>string</td>
<td>Update the URL of payment vendor Touchnet/Cashnet</td>
<td>false</td>
</tr>
<tr>
<td>banner.nonpci.payment.gateway.graduationApplication.url</td>
<td>string</td>
<td>Update the URL of payment vendor Touchnet/Cashnet</td>
<td>false</td>
</tr>
<tr>
<td>banner.nonpci.payment.gateway.paymentAndDepositProcessing.url</td>
<td>string</td>
<td>Update the URL of payment vendor Touchnet/Cashnet</td>
<td>false</td>
</tr>
<tr>
<td>banner.nonpci.payment.gateway.requestPrintedTranscript.url</td>
<td>string</td>
<td>Update the URL of payment vendor Touchnet/Cashnet</td>
<td>false</td>
</tr>
<tr>
<td>banner.nonpci.payment.gateway.statementAndPaymentHistory.url</td>
<td>string</td>
<td>Update the URL of payment vendor Touchnet/Cashnet</td>
<td>false</td>
</tr>
<tr>
<td>banner.pci.enabled.payment.gateway.accountInformation.available</td>
<td>boolean</td>
<td>available</td>
<td>false</td>
</tr>
<tr>
<td>banner.pci.enabled.payment.gateway.accountSummary.available</td>
<td>boolean</td>
<td>available</td>
<td>false</td>
</tr>
<tr>
<td>banner.pci.enabled.payment.gateway.enrollmentVerificationRequest.available</td>
<td>boolean</td>
<td>available</td>
<td>false</td>
</tr>
<tr>
<td>banner.pci.enabled.payment.gateway.graduationApplication.available</td>
<td>boolean</td>
<td>available</td>
<td>false</td>
</tr>
<tr>
<td>banner.pci.enabled.payment.gateway.paymentAndDepositProcessing.available</td>
<td>boolean</td>
<td>available</td>
<td>false</td>
</tr>
<tr>
<td>banner.pci.enabled.payment.gateway.requestPrintedTranscript.available</td>
<td>boolean</td>
<td>available</td>
<td>false</td>
</tr>
<tr>
<td>banner.pci.enabled.payment.gateway.statementAndPaymentHistory.available</td>
<td>boolean</td>
<td>available</td>
<td>false</td>
</tr>
</tbody>
</table>
• Example list for display in Accounts Receivable Self-Service
  – Account Summary
  – Account Detail For Term
  – Tax Notification (1098-T)
  – Account Information
  – Statement and Payment History
  – Payment and Deposit Processing
### Banner Applications Configuration (GUACONF)

**Tax Notification**

**Tax Year**

- 2021

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**Form 1098-T**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Payments received for qualified tuition and related expenses</td>
<td>$6,041.24</td>
</tr>
<tr>
<td>2</td>
<td>$</td>
</tr>
</tbody>
</table>

**Tuition Statement**

- **2021**

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**FILEE's name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number**

- ITS University
- 2500 Daniels Bridge Rd., BLDG 300
- Athens GA 30606
- United States of America
- (706) 5832001

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**Form 1098-T**

**FILEE's employer identification no.**

- 586001897

**STUDENT'S TIN**

- Jackie Lovejoy
- Anywhere Road
- Athens GA 30606

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**Note:**

Unofficial Copy. DO NOT USE this copy to file your taxes.
• Create blue information text messages
• Create a ‘Note’ label unofficialInfoMessage
Account Summary
- Overview
- Term
- Period
### Account Summary Overview

- Sort by any heading
- Show or hide columns
Banner 9x AR Self-Service

Account Summary Overview

• Print
• Holds
• Pay Now
• Search
Banner 9x AR Self-Service

Account Information

Account Information

Current Amount Due as of 03/03/2023 $8,058.95

Account Balance $9,693.95

<table>
<thead>
<tr>
<th>Date Recorded</th>
<th>Description</th>
<th>Term</th>
<th>Charge</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/03/2023</td>
<td>Undergrad In-State TuitionFall</td>
<td>Spring Semester 2023</td>
<td>$900.00</td>
<td></td>
</tr>
<tr>
<td>03/03/2023</td>
<td>Canes Card ID</td>
<td>Spring Semester 2023</td>
<td>$10.00</td>
<td></td>
</tr>
<tr>
<td>03/03/2023</td>
<td>Housing Student Engagement Fee</td>
<td>Spring Semester 2023</td>
<td>$25.00</td>
<td></td>
</tr>
<tr>
<td>03/03/2023</td>
<td>Student Success Center Fee</td>
<td>Spring Semester 2023</td>
<td>$38.00</td>
<td></td>
</tr>
</tbody>
</table>
Banner 9x AR Self-Service

• See [000046353] – Banner Accounts Receivable Advance Deposit Processing Master Article
Banner 9x AR Self-Service

• See Article 000034220 – Setup for Deposit and Fee Payments in Self Service
  – Deposit Type Code Validation (TTVDTPYP)
  – Payment Code Validation (TTVPPTYP)
  – Deposit Detail Control (TGADEPBC)
  – Deposit Crosswalk Form (TGADEPX)
  – Web Payment Rules Form (TSAWPAY)
Payment and Deposit Processing

Banner 9x AR Self-Service
Ask your peers

- Helpful hints
- Lessons learned

Self-reported implementation status

- **Banner 9 Implementation Grid**
Ask your peers

• If you **have** implemented...
  – Level and speed/ease of user acceptance (students & staff)
  – 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

<table>
<thead>
<tr>
<th>Topic</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Registration</td>
<td>Wednesday, January 25, 2023</td>
</tr>
<tr>
<td>Page Builder</td>
<td>Wednesday, February 8, 2023</td>
</tr>
<tr>
<td>Faculty Self-Service</td>
<td>Wednesday, February 22, 2023</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>Wednesday, March 8, 2023</td>
</tr>
<tr>
<td>Communication Management</td>
<td>Wednesday, March 22, 2023</td>
</tr>
<tr>
<td>Proxy Management</td>
<td>Wednesday, April 5, 2023</td>
</tr>
<tr>
<td>Student Self-Service</td>
<td>Wednesday, April 19, 2023</td>
</tr>
<tr>
<td>Action Item Processing</td>
<td>Wednesday, May 3, 2023</td>
</tr>
</tbody>
</table>