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

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.

Ellucian Customer Center Information  Webcasts and Training  Checklists and Resources  Technical Information

Implementation Grid
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.
Where is the documentation?

Login to the Ellucian Customer Center

– Choose Resources
– Knowledge Header
  • Training
  • Search for Banner Action Item Processing
# Web Tailor Functions in Banner Self-Service 9 Channel

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

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<tr>
<th>What?</th>
<th>Where?</th>
<th>Resources</th>
</tr>
</thead>
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<td>Display Audit for Banner Self-Service Logins</td>
<td>GUACONF</td>
<td>Video</td>
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<td>Documentation</td>
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<td>Graphic Customizations</td>
<td>Theme Editor</td>
<td>Video</td>
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<td>Documentation</td>
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<td></td>
<td></td>
<td>Article</td>
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<td>Information Text</td>
<td>GUAINFO</td>
<td>Video</td>
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<td></td>
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<td>Documentation</td>
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<td></td>
<td></td>
<td>Documentation</td>
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<tr>
<td></td>
<td></td>
<td>Documentation</td>
</tr>
<tr>
<td>User Roles</td>
<td>GUUSRL</td>
<td>Video</td>
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<tr>
<td></td>
<td></td>
<td>Documentation</td>
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<td></td>
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<td>Article</td>
</tr>
<tr>
<td>Web Menus and Procedures</td>
<td>GUASMNU</td>
<td>Videos</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Documentation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Article</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>Documentation</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>
<tr>
<td></td>
<td></td>
<td>Article</td>
</tr>
</tbody>
</table>

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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.
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

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

- 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
What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)
StuRegSS = StudentRegistrationSsb
  – Click Configurations tab
  – Filter = GENERAL%
    • Insert Configuration Value = Institution’s URL/BannerGeneralSsb/
What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

- Application ID = General_SS
- Application Name = General SSB App
What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

GENERAL_SS = General SSB App

- Click **Configurations** tab
- Filter = `%enableAction%`
  - Insert **Configuration Value = 1**
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/
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/
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
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
What setup is needed for Roles?

(Banner Self-Service Menu Maintenance (GUASMNU))

- Roles tab – Add Local Roles
  - ACTIONITEMADMIN
  - ACTIONITEMREVIEWER

OR

- Use Article 000047571 for user set up in WebTailor
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
# Baseline Setup Defaults (Technical)

<table>
<thead>
<tr>
<th>Halted Naming Processes</th>
<th>Default Baseline URL - GCRPRCU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Register for Classes</td>
<td>/ssb/term/termSelection?mode=registration</td>
</tr>
<tr>
<td>Plan Ahead</td>
<td>/ssb/term/termSelection?mode=plan</td>
</tr>
<tr>
<td>Prepare for Registration</td>
<td>/ssb/term/termSelection?mode=preReg</td>
</tr>
<tr>
<td>View Registration</td>
<td>/ssb/registrationHistory/registrationHistory</td>
</tr>
</tbody>
</table>

**GCBBPRC**

**Register for Classes**

**Plan Ahead**

**Prepare for Registration**

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

Access Action Item Processing
- Banner General Self-Service
- Click on Action Items Administration
AIP Live Demo – Administrative user

Action Item Management

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

**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.

**Action Items**
Create and maintain Action Items

**Groups**
Maintain titles and instruction for Groups and assign Action Items to a Group.

**Post Action Items**
Schedule and post Action items to a population.
AIP Live Demo – Action Item Status

Action Item Status – GCVASTS table
- Add Action Item Status Rules as needed
- Show/Hide, Search, or Sort Columns
AIP Live Demo – Action Item Status

Action Item Status - Rules
- Click Add
- Add text
- Click Halt Process as needed
- Save
AIP Live Demo – Action Item Status

- Delete by selecting the – under Action

### Action Item Management • Action Item Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Halt Process</th>
<th>System Required</th>
<th>Last Updated By</th>
<th>Activity Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td></td>
<td>✔</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td>−</td>
</tr>
<tr>
<td>Rejected</td>
<td></td>
<td>✔</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td>−</td>
</tr>
<tr>
<td>Do NOT agree</td>
<td>✔</td>
<td></td>
<td>BLYMAN</td>
<td>05/03/2023</td>
<td>−</td>
</tr>
<tr>
<td>NO</td>
<td>✔</td>
<td></td>
<td>JLOVEJOY</td>
<td>03/31/2023</td>
<td>−</td>
</tr>
<tr>
<td>Pending</td>
<td>✔</td>
<td>✔</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td>−</td>
</tr>
</tbody>
</table>
## Action Item Status

### Status Rules

<table>
<thead>
<tr>
<th>Status</th>
<th>Halt Process</th>
<th>System Required</th>
<th>Last Updated By</th>
<th>Activity Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td></td>
<td>✓</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td></td>
</tr>
<tr>
<td>Rejected</td>
<td></td>
<td>✓</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td></td>
</tr>
<tr>
<td>Do NOT agree</td>
<td>✓</td>
<td></td>
<td>BLYMAN</td>
<td>05/03/2023</td>
<td></td>
</tr>
<tr>
<td>NO</td>
<td>✓</td>
<td></td>
<td>JLOVEJOY</td>
<td>03/31/2023</td>
<td></td>
</tr>
<tr>
<td>Pending</td>
<td>✓</td>
<td>✓</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td></td>
</tr>
</tbody>
</table>

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

[No] [Yes]
# AIP Live Demo – Action Item Status

## Action Item Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Halt Process</th>
<th>System Required</th>
<th>Last Updated By</th>
<th>Activity Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td></td>
<td>✔</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td>-</td>
</tr>
<tr>
<td>Rejected</td>
<td></td>
<td>✔</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td>-</td>
</tr>
<tr>
<td>NO</td>
<td>✔</td>
<td></td>
<td>JLOVEJOY</td>
<td>03/31/2023</td>
<td>-</td>
</tr>
<tr>
<td>Pending</td>
<td>✔</td>
<td>✔</td>
<td>BANINST1</td>
<td>08/24/2018</td>
<td>-</td>
</tr>
</tbody>
</table>

*Delete successful.*
AIP Live Demo – Action Items

- Displays existing Action Items (GCBACTM)
### AIP Live Demo – Action Items

**Action Item**

AIP_DEMO_ITEM

**Folder**

CM_Student

**Status**

Draft

**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 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 Live Demo – Action Items

### Overview > Edits allowed until Action Item is Posted

<table>
<thead>
<tr>
<th>Overview</th>
<th>Halted Processes</th>
<th>Action Item Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Item</td>
<td>AIP_DEMO_ITEM</td>
<td>Folder</td>
</tr>
<tr>
<td>Status</td>
<td>CM_Student</td>
<td>CM_Student</td>
</tr>
<tr>
<td>Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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.
## AIP Live Demo – Action Items

### Halted Processes
- Click Edit Information

<table>
<thead>
<tr>
<th>Overview</th>
<th>Halted Processes</th>
<th>Action Item Content</th>
</tr>
</thead>
</table>

**Halted Process(es)**

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

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

<table>
<thead>
<tr>
<th>Process</th>
<th>URL</th>
<th>Persona</th>
</tr>
</thead>
<tbody>
<tr>
<td>Register for Classes</td>
<td>/ssb/term/termSelection?mode=registration</td>
<td>Student</td>
</tr>
</tbody>
</table>
AIP Live Demo – Action Items

Action Item Content

- Master Template (Baseline) (GCBPBTR)
- Enter Content (GCRAFCT)
# 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.

<table>
<thead>
<tr>
<th>Response Option Text *</th>
<th>Status *</th>
<th>Need Review</th>
<th>Maximum Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>I agree to all the terms and conditions above</td>
<td>Completed</td>
<td></td>
<td>00</td>
</tr>
<tr>
<td>I do not agree, too long to read</td>
<td>NO</td>
<td></td>
<td>00</td>
</tr>
</tbody>
</table>

[Add Response Option]
### AIP Live Demo - Groups

#### Action Item Management • Groups

<table>
<thead>
<tr>
<th>Group</th>
<th>Folder</th>
<th>Status</th>
<th>Posted</th>
<th>Last Updated By</th>
<th>Activity Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIP_DEMO_GROUP</td>
<td>CM_Student</td>
<td>Active</td>
<td>Posted</td>
<td>BLYMAN</td>
<td>05/03/2023</td>
<td></td>
</tr>
<tr>
<td>AIP_DEMO_GROUP_TEST</td>
<td>CM_Student</td>
<td>Active</td>
<td>Posted</td>
<td>BLYMAN</td>
<td>04/28/2023</td>
<td></td>
</tr>
<tr>
<td>AIP_DEMO_TEST</td>
<td>CM_Student</td>
<td>Active</td>
<td>Posted</td>
<td>BLYMAN</td>
<td>04/28/2023</td>
<td></td>
</tr>
</tbody>
</table>
AIP Live Demo – Groups

Groups
- Create new Group (GCBAGRP)

Add Group

Group *
AIP_DEMO_GROUP

Folder *
CM_Student

Status *
Draft

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.
## AIP Live Demo – Groups

<table>
<thead>
<tr>
<th>Overview</th>
<th>Group Action Items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group</strong></td>
<td></td>
</tr>
<tr>
<td>AIP_DEMO_GROUP</td>
<td></td>
</tr>
<tr>
<td><strong>Folder</strong></td>
<td></td>
</tr>
<tr>
<td>CM_Student</td>
<td></td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td></td>
</tr>
<tr>
<td><strong>Group Title</strong></td>
<td></td>
</tr>
<tr>
<td>Group Title: AIP Demo Group Title - Financial Agreement</td>
<td></td>
</tr>
<tr>
<td><strong>Group Instruction</strong></td>
<td></td>
</tr>
<tr>
<td>Group Instructions:</td>
<td></td>
</tr>
<tr>
<td>Students must agree to the terms and conditions to move forward with Registration.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity</th>
<th>Last Updated By</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>BLYMAN</td>
<td>05/03/2023</td>
</tr>
</tbody>
</table>

---

**UNIVERSITY SYSTEM OF GEORGIA**
AIP Live Demo – Groups

Add Action Item(s)

Overview

Group Action Items

Add and Order Action Items

Action Items

Add Action Item

Save

Cancel
### 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.

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Status</th>
<th>Folder</th>
<th>Action Item Title/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIP_DEMO_ITEM</td>
<td>Active</td>
<td>CM_Student</td>
<td>Action Item Title: Student Financial Responsibility Agreement</td>
</tr>
</tbody>
</table>

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.
Post Action Items
- Click Add
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 *  Display End Date *

05/03/2023  07/27/2023
Post Action Items – Post Action Item Jobs

- Job Status
- Queued
- Scheduled
- Only jobs with status of Scheduled can be updated
- Complete
AIP Live Demo – Monitor Action Item

- Four Square Tile in Top Left
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
AIP Live Demo – 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

Action Items

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Group</th>
<th>Action Item</th>
<th>Status</th>
<th>Status date</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student, Miguel</td>
<td>913261221</td>
<td>AIP_DEMO_GROUP2</td>
<td>AIP_DEMO_ITEM2</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
AIP Live Demo – User Experience

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

Welcome
You have the following items that require your attention.

AIP DEMO Group Title - Financial Agreement

Instructions

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
• Users selects to not agree

9. I am subject to and responsible for complying with all applicable university policies and procedures.

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

- Status is set to NO

Action Item Processing

Item Title: Student Financial Responsibility Agreement

End Date: 07/27/2023

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:

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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.

Continue
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

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

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Person ID</th>
<th>Person Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIP_DEMO_ITEM2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Action Items**

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Group</th>
<th>Action Item</th>
<th>Status</th>
<th>Status date</th>
<th>Response</th>
<th>Display start date</th>
<th>Display end date</th>
<th>Review</th>
<th>Attachments</th>
<th>Review Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student, Miguel</td>
<td>913261221</td>
<td>AIP_DEMO_GROUP:AIP_DEMO_ITEM2</td>
<td>NO</td>
<td>05/04/2023</td>
<td>I do not agree, too long to read</td>
<td>05/04/2023</td>
<td>07/27/2023</td>
<td></td>
<td></td>
<td>Review needed</td>
<td></td>
</tr>
</tbody>
</table>
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

• Review status has multiple options and can either release the halt, allow update, or continue the block.
AIP Live Demo – Review Action Item

- Comments can be added if needed
- Contact email list from GUACONF
AIP Live Demo – Review Action Item

• Review Status shows Review approved, can update
• User should now be able to update the result option
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 its conflict of law provisions, and all actions arising under this Agreement will be filed and litigated in 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 Live Demo – User Experience

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

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<td>AIP_DEMO_GROUP2</td>
<td>AIP_DEMO_ITEM2</td>
<td>Completed</td>
<td>05/04/2023</td>
<td>I agree to all the terms and conditions above</td>
</tr>
</tbody>
</table>
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 & 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

<table>
<thead>
<tr>
<th>Topic</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Registration</td>
<td>Available on our Website</td>
</tr>
<tr>
<td>Page Builder</td>
<td>Available on our Website</td>
</tr>
<tr>
<td>Faculty Self-Service</td>
<td>Available on our Website</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>Available on our Website</td>
</tr>
<tr>
<td>Communication Management</td>
<td>Available on our Website</td>
</tr>
<tr>
<td>Student Self-Service</td>
<td>Available on our Website</td>
</tr>
<tr>
<td>Action Item Processing</td>
<td>Wednesday, May 3, 2023</td>
</tr>
<tr>
<td>Proxy Management</td>
<td>Wednesday, May 17, 2023</td>
</tr>
</tbody>
</table>