Train the Trainer: Implementing Proxy Management and Global Proxy
May 2023
Agenda

- How to get help?
- Where is the documentation?
- Common setup steps
- Global Proxy
  - How to set it up
  - Live Demo
- Proxy Management
  - How to set it up
  - Live Demo
- Ask your peers
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
  – 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.
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

General
The core component of Banner, providing centralized system management tools and utility programs to the other Banner systems.

General Self-Service
Empower administrators and staff across the institution to solve departmental needs.

Download it!
Proxy Access Communication Rule (GERCOMM) page

You can use this page to configure the HTML e-mail letters that can be sent out for each communication type that is being generated.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Code</td>
<td>Code representing the system.</td>
</tr>
<tr>
<td>Communication Type</td>
<td>Code representing a communication type.</td>
</tr>
<tr>
<td>Admin Email Override</td>
<td>Replacement Admin email address to be used for replies and administration communications.</td>
</tr>
<tr>
<td>Admin Email System Default</td>
<td>Default Admin email address value defined using the PROXY_ACCESS_EMAIL_FROM Web Tailor parameter.</td>
</tr>
</tbody>
</table>
Proxy Access setup

An administrator needs to set up in the administrative Banner application the Banner Self-Service pages a proxy can access to view a student's information.

**Configure guest authentication**
Guest authentication defines whether or not proxy users can log in to the Self-Service application. You must enable the guest authentication configuration associated with the Student Self-Service application to enable access to all pages a proxy can view.

**Review proxy system types on GTYSYS**
Review and verify that the required proxy system types are correctly installed. You do not need to change the types.

**Configure relationship types on GTYR**
Review the existing proxy relationship types and add new ones needed at your institution. For example, you could add a sibling relationship type.

**Update system options on GTVOTYP**
Proxy Access Option Type Validation (GTVOTYP) page defines options that General Self-Service applies globally to proxy access.
Where is the documentation?

- **000047865** - Article # 47865 - General Self Service 9.5 and later Proxy Access Setup Steps
- **000049712** - Article # 000049712 - Banner 9 - General Self Service 9.8 - Global Proxy Access Setup
  - References **CR-000183300** - Clicking Proxy or Global Proxy Management results in blank page with 500 error - ORA-06502 PLSQL numeric or value error.
  - **KB0000500479** - Banner 9 - Global Proxy Access stopped working - Blank Page may appear
- **000048881** - Article 48881 - Banner 9 Proxy Access - Passphrase purpose and length
- **000051290** - Logging into SSB9x apps as proxy or guest with guestAuthenticationEnabled = true and getting errors - Password expired - Logon denied
- **000051370** - Running SSB9x -- BannerGeneralSsb -- Global Proxy Management -- Add Proxy -- gets this error -- Relationships have not been configured correctly
Where is the documentation?

- Article 000051317 - Banner 9 Self-Service Guided Adoption
  - Adoption plan (article attachment)
  - Link to Banner 9 Self-Service Adoption Channel
Click here to go to the Adoption Channel

Configure Banner General Self-Service
21 minute video

06 Create and View Proxy Menu Pages
6 minute demo

07 Create and View Global Proxy Menu Pages
5 minute demo

08 Delete Proxy Menu Pages
2 minute demo
# Proxy Management & Global Proxy

<table>
<thead>
<tr>
<th><strong>Proxy Management</strong></th>
<th><strong>Global Proxy</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Student grants access</td>
<td>Campus staff gain access</td>
</tr>
<tr>
<td>Proxy = Anyone the student wants to access their information (based on relationship type)</td>
<td>Usage restricted to a controlled group of campus staff</td>
</tr>
<tr>
<td>Student must have Banner ID and use Proxy Management tile in General Self Service to add proxies</td>
<td>Campus staff must have appropriate roles and access to General Self Service</td>
</tr>
<tr>
<td>Proxy accesses Self Service using link and pin provided via email</td>
<td>Staff uses Global Proxy Management tile in General Self Service</td>
</tr>
<tr>
<td>Only specific pages can be viewed</td>
<td>Only specific pages can be viewed</td>
</tr>
<tr>
<td>Campus can hide data elements</td>
<td>Campus can hide data elements</td>
</tr>
</tbody>
</table>
Common Setup Steps
Common Setup Steps
Proxy Parameters

• Banner Applications Configurations page (GUACONF)
  – Application ID = GLOBAL
  – Self-Service Parameters tab
    • ENABLE_GORRSQL_SSB_ROLES = Y
    • PROXYACCESS_ROLE_ENABLED = Y
    • PROXYMGMT_ROLE_ENABLED = Y
    • PROXY_ACCESS_DAD = /
    • PROXY_ACCESS_EMAIL_FROM = email address
    • PROXY_ACCESS_EMAIL_HOST = valid email host
Common Setup Steps
Proxy Parameters

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Parameter Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENABLE_GORRSQL_SSB_ROLE</td>
<td>Y</td>
<td>ENABLE_GORRSQL_SSB_ROLE: Set the value to &quot;Y&quot; if you will be using GORRSQL rules to d...</td>
</tr>
<tr>
<td>PROXYACCESS_ROLE_ENABLED</td>
<td>Y</td>
<td>PROXYACCESS_ROLE_ENABLED: Set the value to &quot;Y&quot; if your institution wants to allow proxy ac...</td>
</tr>
<tr>
<td>PROXYMGMT_ROLE_ENABLED</td>
<td>Y</td>
<td>PROXYMGMT_ROLE_ENABLED: Set the value to &quot;Y&quot; if your institution wants to define who can e...</td>
</tr>
<tr>
<td>PROXY_ACCESS_DAD</td>
<td>/</td>
<td>PROXY_ACCESS_DAD: Set to the DAD for Proxy Access. Typically this will be the same as Self-...</td>
</tr>
<tr>
<td>PROXY_ACCESS_EMAIL_FROM</td>
<td><a href="mailto:no-reply@usg.edu">no-reply@usg.edu</a></td>
<td>PROXY_ACCESS_EMAIL_FROM: Set to the value used as the From address on e-mails sent from...</td>
</tr>
<tr>
<td>PROXY_ACCESS_EMAIL_HOST</td>
<td>[redacted]</td>
<td></td>
</tr>
</tbody>
</table>
Common Setup Steps
Proxy URLs

• Banner Applications Configurations page (GUACONF)
  – Application ID = BAN9_PROXY
  – Configurations tab
    • proxyAccessURL.LOCATION = URL for Student Self Service
      – Used by Proxy Management
    • globalProxyAccessURL.STUDENTLOCATION = URL for Student Self Service
      – Used by Global Proxy
Common Setup Steps
Proxy URLs

Default value:
http://<HOST_NAME>:<PORT>/StudentSelfService/

<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>proxyAccessURL_LOCATION</td>
<td>string</td>
<td>https://&lt;URL&gt;/StudentSelfService/</td>
<td></td>
</tr>
<tr>
<td>globalProxyAccessURL_STUDENTLOCATION</td>
<td>string</td>
<td>https://&lt;URL&gt;/StudentSelfService/</td>
<td></td>
</tr>
</tbody>
</table>
Common Setup Steps
Proxy System

• Proxy Access System Type Validation Form (GTVSYST)
  – Code = PROXY
    • Used by Proxy Management
  – Code = PROXY_GLOBAL_ACCESS
    • Used by Global Proxy
What is Global Proxy?

- Use for troubleshooting navigation, access, or errors
- Institution
  - Creates menu per relationship, designates pages/data elements to be viewed by relationship type (i.e. Registrar, Financial Aid)
- Campus staff
  - Log in via General Self Service, enter student ID, select relationship, view page student’s pages, receive emails based on activity
- Not supported for custom pages
  - CR-000178800 - Use of custom pages not supported in Banner 9
- Only allows access to specific pages
  - Ellucian documentation > Banner General Self-Service – Configure > search “Content pages that a global proxy can view”
## What is Global Proxy?

### Student Self-Service pages

<table>
<thead>
<tr>
<th>Page name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/ssb/academicTranscript</td>
<td>Academic Transcript</td>
</tr>
<tr>
<td>/ssb/studentGrades</td>
<td>Student Grades</td>
</tr>
<tr>
<td>/ssb/studentTaxNotification</td>
<td>Tax Notification 1098T</td>
</tr>
<tr>
<td>/ssb/studentProfile</td>
<td>Student Profile</td>
</tr>
<tr>
<td></td>
<td>Element level configurations on GUACONF with an Application ID of SSS to control the information that a proxy can see on the Student Profile page.</td>
</tr>
<tr>
<td>/ssb/depositProcessing</td>
<td>Deposit Processing</td>
</tr>
<tr>
<td>/ssb/accountDetailByTerm</td>
<td>Account Detail By Term</td>
</tr>
<tr>
<td>/ssb/accountInformation</td>
<td>Account Information</td>
</tr>
<tr>
<td>/ssb/accountSummary</td>
<td>Account Summary</td>
</tr>
<tr>
<td>/ssb/statementAndPaymentHistory</td>
<td>Statement and Payment History</td>
</tr>
</tbody>
</table>

Pages available for use with Global Proxy

Pages that a global proxy views do not include links to other pages to ensure a global proxy can't access unauthorized information.
<table>
<thead>
<tr>
<th>Page name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/ssb/financialAid/dashboard/federalShoppingSheet</td>
<td>College Financing Plan</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/home</td>
<td>Financial Aid Dashboard</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/listAwardHistoryDetails</td>
<td>Financial Aid Award History</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/listAwardLetterDetails</td>
<td>Financial Aid Award Offer</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/notifications</td>
<td>Financial Aid Notifications</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/resources</td>
<td>Financial Aid Resources</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/studentAcademicProgress</td>
<td>Financial Aid Satisfactory Requirements</td>
</tr>
</tbody>
</table>
Global Proxy System Options

• Proxy Access Systems and Options Type Rule Form (GTVOTYP)
  – System Code = PROXY_GLOBAL_ACCESS
  – Option Type Code = DELETE_HISTORY
    • When global proxy access is removed, delete history?
    • Ellucian KB000500479 - To avoid defect CR-000183300, set to Y
Global Proxy Email

• Proxy Access Communication Rule Form (GERCOMM)
  – System Code = PROXY_GLOBAL_ACCESS
  – Communication Type
    • NEW_PROXY
    • DELETE_RELATIONSHIP
  – Check “Send e-mail?”
  – Set the system default sender email address on GUACONF > Application ID = GLOBAL > Self-Service Parameters tab > PROXY_ACCESS_EMAIL_FROM
## Global Proxy Email

### Proxy Access Communication Rule Form GERCOMM 9.3.9

**System Code:** PROXY_GLOBAL_ACCESS  
**Proxy Access:** Global Administrative Access  
**Communication Type:** NEW_PROXY  
**New proxy identity**

#### Proxy Access Communication Rule

<table>
<thead>
<tr>
<th><strong>Admin Email:</strong></th>
<th><strong>System Default:</strong> <a href="mailto:no-reply@usg.edu">no-reply@usg.edu</a></th>
</tr>
</thead>
</table>

**Person Letter**

<table>
<thead>
<tr>
<th><strong>Code</strong></th>
<th><strong>Description</strong></th>
<th><strong>Send e-mail?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>GP_GBL_NEW_PER</td>
<td>Proxy (Global) New-Person</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

**Admin Letter**

<table>
<thead>
<tr>
<th><strong>Code</strong></th>
<th><strong>Description</strong></th>
<th><strong>Send e-mail?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>GP_GBL_NEWADM</td>
<td>Proxy (Global) New-Admin</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

**Proxy Letter**

<table>
<thead>
<tr>
<th><strong>Code</strong></th>
<th><strong>Description</strong></th>
<th><strong>Send e-mail?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>GP_GBL_NEW_PXY</td>
<td>Proxy (Global) New-Proxy</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

#### Proxy Notifications

<table>
<thead>
<tr>
<th><strong>Relationship Code</strong></th>
<th><strong>Description</strong></th>
<th><strong>Proxy Notification Letter Code</strong></th>
<th><strong>Description</strong></th>
<th><strong>Send Email?</strong></th>
<th><strong>bcc to Admin?</strong></th>
</tr>
</thead>
</table>

**Record 1 of 1**

---

25
Global Proxy
Relationship + System + Menu + Page + Role

• Connect relationship code (GTVRETP) to system code (GERPRXY)
  – Example Relationship code = UNIV_ADMIN
  – System code = PROXY_GLOBAL_ACCESS

• Create menu (GUASMNU) and format menu name “PROXY_ACCESS_<relationship code from GTVRETP>”
  – Example Relationship code = UNIV_ADMIN
  – Example Menu = PROXY_ACCESS_UNIV_ADMIN

• Put PROXYGLOBALACCESS role on menu (GUASMNU) and user (GUAUSRL)

• Set role (ROLE_SELFSERVICE-PROXYGLOBALACCESS_BAN_DEFAULT_M) for pages (GUACONF)

• Add pages to menu (GUASMNU) and add PROXYGLOBALACCESS role to pages
Global Proxy Relationship

• Proxy Access Relationship Type Validation Form (GTVRETP)
  – Create code for each type of user
    • Example: UNIV_ADMIN, UNIV_REGISTRAR, UNIV_FINAID
• Proxy Access Data Option Rule Form (GERPRXY)
  – System Code = **PROXY_GLOBAL_ACCESS**
  – Insert relationship type codes
Global Proxy Page + Role

- Banner Self-Service Menu Maintenance page (GUASMNU)
  - Menu Setup tab
    - Copy/insert local versions of all pages to be added to menu
    - Module Code = PXY
    - Check “Enabled Indicator”
  - Roles tab
    - Role = PROXYGLOBALACCESS
    - Use STUDENT or FINAID as appropriate
Global Proxy
Page + Role

Banner General Self-Service - Configure

Content pages that a global proxy can view

Version: Banner General Self-Service - 9.13.0  Last Updated: Mar 16, 2023  1 Minutes read
# Banner General Self-Service  # Configure  # Baseline  # 9.13.0

Banner General Self-Service includes specific pages that you can make available to a global proxy to access. Review this list of pages and decide which ones to make available for the Global Proxy Access menus.

These are the pages that you can establish on the global proxy menus using the Banner Self-Service Menu Maintenance (GUASMNU) page.

Student Self-Service pages

<table>
<thead>
<tr>
<th>Page name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/ssb/academicTranscript</td>
<td>Academic Transcript</td>
</tr>
<tr>
<td>/ssb/studentGrades</td>
<td>Student Grades</td>
</tr>
<tr>
<td>/ssb/studentTaxNotification</td>
<td>Tax Notification 1098T</td>
</tr>
<tr>
<td>/ssb/studentProfile</td>
<td>Student Profile</td>
</tr>
</tbody>
</table>

Element level configurations on GUACONF with an Application ID of 555 control the information that a proxy can see on the Student Profile page.
Global Proxy Page + Role

### Menu Details

<table>
<thead>
<tr>
<th>Menu Name</th>
<th>Menu Description</th>
<th>Baseline/Local</th>
<th>Module Code</th>
<th>Module Description</th>
<th>Comments</th>
<th>Enabled Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>/ssb/academicTranscript</td>
<td>Academic Transcript</td>
<td>Baseline</td>
<td>PXY</td>
<td>PROXY_ACCESS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>/ssb/academicTranscript</td>
<td>Academic Transcript</td>
<td>Local</td>
<td>PXY</td>
<td>PROXY_ACCESS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Roles

**Baseline Roles**

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>STUDENT</td>
<td>Student</td>
</tr>
</tbody>
</table>

**Add Local Roles**

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROXYGLOBALACCESS</td>
<td>Proxy Global Access</td>
</tr>
<tr>
<td>STUDENT</td>
<td>Student</td>
</tr>
</tbody>
</table>
• Banner Application Configurations page (GUACONF)
  – Application ID = **SSS**
    • Application Pages tab
    • Page ID = every page available for global proxy
    • Roles section
      – Verify/insert `ROLE_SELFSERVICE-PROXYGLOBALACCESS_BAN_DEFAULT_M`
      – To temporarily hide page, without removing role, append “_HIDE” to end of role
### Global Proxy Page + Role

#### Application ID: SSS  
**StudentSelfService**

<table>
<thead>
<tr>
<th>Application Pages</th>
<th>Configurations</th>
<th>Self Service Rules</th>
<th>Self Service Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>APPLICATIONS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Active filters:**
- **AccountDetailByTerm**
- **Status:** unchecked

<table>
<thead>
<tr>
<th>Page ID</th>
<th>Page URL</th>
<th>Page Description</th>
<th>Status</th>
<th>Display Sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>/ssb/accountDetailByTerm</td>
<td>Account Detail By Term</td>
<td></td>
<td>27</td>
</tr>
</tbody>
</table>

**ROLES**

<table>
<thead>
<tr>
<th>Page ID</th>
<th>Role</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>AccountDetailByTerm</td>
<td>ROLE_SELFSERVICE-GUEST_BAN_DEFAULT_M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AccountDetailByTerm</td>
<td>ROLE_SELFSERVICE-PROXYGLOBALACCESS_BAN_DEFAULT_M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AccountDetailByTerm</td>
<td>ROLE_SELFSERVICE-STUDENT_BAN_DEFAULT_M</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Global Proxy
Page + Role

• Banner Application Configurations page (GUACONF)
  – Application ID = SSS
    • Configurations tab
    • Configuration Value
      – Add “GlobalProxy” to allow global proxy access to specific page element
      – Remove “GlobalProxy” to prevent global process access to specific page element
  • See documentation for list of elements
<table>
<thead>
<tr>
<th>Configuration Name</th>
<th>Configuration Type</th>
<th>Configuration Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>all.bioinformation.emergencyContact.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, Proxy, GlobalProxy</td>
</tr>
<tr>
<td>all.bioinformation.email.view</td>
<td>string</td>
<td>Profile</td>
</tr>
<tr>
<td>all.bioinformation.email.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, Faculty, FacultyOverride, Prof...</td>
</tr>
<tr>
<td>all.bioinformation.telephone.view</td>
<td>string</td>
<td>Profile</td>
</tr>
<tr>
<td>all.bioinformation.telephone.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, Faculty, FacultyOverride, Prof...</td>
</tr>
<tr>
<td>all.bioinformation.gender.view</td>
<td>string</td>
<td>Profile</td>
</tr>
<tr>
<td>all.bioinformation.gender.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, GlobalProxy</td>
</tr>
<tr>
<td>all.bioinformation.birthDate.view</td>
<td>string</td>
<td>Profile</td>
</tr>
<tr>
<td>all.bioinformation.birthDate.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, Proxy, GlobalProxy</td>
</tr>
<tr>
<td>all.bioinformation.nowEthnicity.view</td>
<td>string</td>
<td>Profile</td>
</tr>
</tbody>
</table>
Global Proxy
Page + Role

• Banner Application Configurations page (GUACONF)
  – Application ID = BAN9_PROXY
    • Configurations tab
    • Configuration Value
      – Add “GLOBAL_PROXY” to allow global proxy access to specific page element
      – Remove “GLOBAL_PROXY” to prevent global process access to specific page element
    • See documentation for list of elements
### Global Proxy Page + Role

**Application ID:** BAN9_PROXY  
Banner 9 Proxy Access settings

<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>proxyAccessURL_LOCATION</td>
<td>string</td>
<td><a href="https://t1997.gabest.usg.edu/StudentSelfService/">https://t1997.gabest.usg.edu/StudentSelfService/</a></td>
<td></td>
</tr>
<tr>
<td>globalProxyAccessURL_STUDENTLOCATION</td>
<td>string</td>
<td><a href="https://t1997.gabest.usg.edu/StudentSelfService/">https://t1997.gabest.usg.edu/StudentSelfService/</a></td>
<td></td>
</tr>
<tr>
<td>financialAid.awardAcpTabInd</td>
<td>list</td>
<td></td>
<td></td>
</tr>
<tr>
<td>financialAid.awardInfInd</td>
<td>list</td>
<td></td>
<td></td>
</tr>
<tr>
<td>financialAid.coalInd</td>
<td>list</td>
<td>[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]</td>
<td></td>
</tr>
<tr>
<td>financialAid.fundZeroAmtInd</td>
<td>list</td>
<td>[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]</td>
<td></td>
</tr>
<tr>
<td>financialAid.housingStatusInd</td>
<td>list</td>
<td>[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]</td>
<td></td>
</tr>
<tr>
<td>financialAid.needCalcInd</td>
<td>list</td>
<td>[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]</td>
<td></td>
</tr>
<tr>
<td>financialAid.resourceInfoInfInd</td>
<td>list</td>
<td>[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]</td>
<td></td>
</tr>
<tr>
<td>financialAid.resourceSubmitInfInd</td>
<td>list</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• Banner Application Configurations page (GUACONF)
  – Application ID = GENERAL_SS
  – Application Pages tab
  – Roles section
    • Verify/insert ROLE_SELFSERVICE-PROXYGLOBALACCESS_BAN_DEFAULT_M
• Banner Self-Service Menu Maintenance page (GUASMNU)
  – Menu Setup tab
    • Create menu for each relationship
    • Format menu name “PROXY_ACCESS_<relationship code from GTVRETP>”
      – Example Relationship code = UNIV_ADMIN
      – Example Menu = PROXY_ACCESS_UNIV_ADMIN
    • Module Code = PXY
    • Check “Enabled Indicator”
  – Roles tab
    • Role = PROXYGLOBALACCESS
# Global Proxy Menu + Role

## Menu Details

### Active filters:
- **Menu Name**: PROXY_ACCESS_UNIV_ADMIN

<table>
<thead>
<tr>
<th>Menu Name *</th>
<th>Menu Description *</th>
<th>Baseline/Local</th>
<th>Module Code *</th>
<th>Module Description</th>
<th>Comments</th>
<th>Enabled Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROXY_ACCESS_UNIV_ADMIN</td>
<td>Global Admin Access</td>
<td>Local</td>
<td>PXY</td>
<td>PROXY_ACCESS</td>
<td></td>
<td>✅</td>
</tr>
</tbody>
</table>

## Baseline Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Add Local Roles

<table>
<thead>
<tr>
<th>Role *</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROXYGLOBALACCESS</td>
<td>Proxy Global Access</td>
</tr>
</tbody>
</table>

---

*Image: Ellucian Banner Self-Service Menu Maintenance GUASMNU 9.3.20*
Global Proxy Menu + Page

• Banner Self-Service Menu Maintenance page (GUASMNU)
  – Menu Setup tab > Menu Items Details section
    • Add pages to menu
    • URL = page name (ex. /ssb/academicTranscript)
    • Link Text
    • Check “Enabled” indicator
## Global Proxy Menu + Page

### Menu Details

**Active filters:**
- **Menu Name:** PROXY_ACCESS_UNIV_ADMIN

<table>
<thead>
<tr>
<th>Menu Name</th>
<th>Menu Description</th>
<th>Baseline/Local</th>
<th>Module Code</th>
<th>Module Description</th>
<th>Comments</th>
<th>Enabled Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROXY_ACCESS_UNIV_ADMIN</td>
<td>Global Admin Access</td>
<td>Local</td>
<td>PXY</td>
<td>PROXY_ACCESS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Menu Item Details

<table>
<thead>
<tr>
<th>Baseline/Local</th>
<th>Sequence Number</th>
<th>URL</th>
<th>Link Text</th>
<th>Link Description</th>
<th>Status Bar Text</th>
<th>Bullet Override Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local</td>
<td>1</td>
<td>/ssb/academicTranscript</td>
<td>Academic Transcript</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local</td>
<td>2</td>
<td>/ssb/studentGrades</td>
<td>Student Grades</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local</td>
<td>3</td>
<td>/ssb/studentTaxNotification</td>
<td>Tax Notification 1098T</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local</td>
<td>4</td>
<td>/ssb/studentProfile</td>
<td>Student Profile</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local</td>
<td>5</td>
<td>/ssb/depositProcessing</td>
<td>Deposit Processing</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• Maintain Self-Service User Roles page (GUAUSRL)
  – Add role to global proxy user
  – Role = PROXYGLOBALACCESS
### Global Proxy User + Role

**Maintain Self-Service User Roles**

**ID:** 913260516  Cindy Taylor

#### System Assigned Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Web Users</td>
<td></td>
</tr>
<tr>
<td>Faculty</td>
<td></td>
</tr>
<tr>
<td>Proxy Global Access Target</td>
<td></td>
</tr>
<tr>
<td>Student</td>
<td></td>
</tr>
</tbody>
</table>

#### Add Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIONITEMADMIN</td>
<td>Action Item Management Administrator</td>
</tr>
<tr>
<td>ACTIONITEMREVIEWER</td>
<td>Action Item Management Reviewer</td>
</tr>
<tr>
<td>COMMUNICATIONADMIN</td>
<td>Communication Management Administrator</td>
</tr>
<tr>
<td>COMMUNICATIONCONTENTADMIN</td>
<td>Communication Management Content Administrator</td>
</tr>
<tr>
<td>COMMUNICATIONUSER</td>
<td>Communication Management User</td>
</tr>
<tr>
<td>FINAID_STAFF</td>
<td>Financial Aid Staff</td>
</tr>
<tr>
<td>PROXYGLOBALACCESS</td>
<td>Proxy Global Access</td>
</tr>
<tr>
<td>Registrar</td>
<td>Registrar</td>
</tr>
<tr>
<td>WTAILOADMIN</td>
<td>Web Tailor Administrator</td>
</tr>
</tbody>
</table>

Record 1 of 4

Record 7 of 9

[Image of the interface showing the user information and roles.]
Global Proxy
User + Relationship

• Business Rule Parameter Code Validation page (GTVSQPA)
  – Code = PROXY_RELATIONSHIP
  – Code = PROXY_SYSTEM
Global Proxy User + Relationship

- Business Rule Code Validation (GTVSQRU)
  - Create codes for each relationship
  - Format “PROXY_<relationship code from GTVRETP>”
Global Proxy
User + Relationship

- Business Rule Process Parameters page (GORSQPA)
  - Process Code = PROXY_RELATIONSHIP_CHECK
Global Proxy
User + Relationship

• Business Rules page (GORRSSQL)
  – Process Code = PROXY_RELATIONSHIP_CHECK
  – Rule = GTVSQRU code
  – Write, validate, activate sql to grant access
  – See documentation for examples
Global Proxy
User + Relationship
Global Proxy
Target Population

• Target population = students

• Business Rules page (GORRSQNL)
  – Process = SSB_ROLES
  – Rule = SSB_ROLE_PROXYTARGET

• Review baseline delivered rules, edit as needed, or create new rules to define population

• Click “Validate SQL” button and check “Active” indicator for desired population rule
Live Demo
Live Demo

• Access Global Proxy Management
  - Banner General Self-Service
  - Click on Global Proxy Management
• Click on ‘Add Proxy’ button
• Establishing a New Proxy
  - Enter a Banner ID
  - Select the appropriate relationship type
  - Submit the record
• **Confirm Global Proxy Access**
  - Click on the dropdown menu
  - List of available pages will be displayed
Live Demo

- **Global Proxy Management Example**
  - Academic Transcript

![Academic Transcript](image)

- **Student Information**
  - Name: Grace Bowden
  - Birth Date: 29-AUG-1968
  - Student Type: Continuing

- **Curriculum Information**
  - Current Program:
    - College: College of Nursing & Health Sc
    - Major and Department: Pre-Nursing Traditional Track, Nursing
- **Delete Proxy**
  - Click on the trashcan
  - Confirm deletion when popup appears
Proxy Management
What is Proxy Management?

- **Institution**
  - Creates menu per relationship, designates pages/data elements to be viewed by relationship type (i.e. parent, employer)

- **Student**
  - Grants access to proxy, specifies pages to be viewed, duration of access, receives emails based on activity

- **Proxy**
  - Receives initial emails (URL, initial password), creates profile, views student’s pages, receives emails based on activity

- **Only allows access to specific pages**
  - [Ellucian documentation](#) > Banner General Self-Service – Configure > search “Content pages that a proxy can view”
### Student Self-Service pages

<table>
<thead>
<tr>
<th>Page name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/ssb/academicTranscript</td>
<td>Academic Transcript</td>
</tr>
<tr>
<td>/ssb/proxy/acctsumm</td>
<td>Account Summary</td>
</tr>
<tr>
<td>/ssb/proxy/awardPackage</td>
<td>Award Package</td>
</tr>
<tr>
<td>/ssb/proxy/awardhist</td>
<td>Award History</td>
</tr>
<tr>
<td>/ssb/proxy/courseScheduleDetail</td>
<td>Student Detail Schedule</td>
</tr>
<tr>
<td>/ssb/proxy/crsesched</td>
<td>Week at Glance</td>
</tr>
<tr>
<td>/ssb/proxy/finaidappsumm</td>
<td>Financial Aid Status</td>
</tr>
<tr>
<td>/ssb/proxy/holds</td>
<td>Student Holds</td>
</tr>
<tr>
<td>/ssb/studentGrades</td>
<td>Student Grades</td>
</tr>
<tr>
<td>/ssb/studentTaxNotification</td>
<td>Tax Notification 1098T</td>
</tr>
<tr>
<td>/ssb/studentProfile</td>
<td>Student Profile</td>
</tr>
<tr>
<td></td>
<td>Element level configurations on GUACONF with an Application ID of SSS control the information that a proxy can see on the Student Profile page.</td>
</tr>
<tr>
<td>/ssb/depositProcessing</td>
<td>Deposit Processing</td>
</tr>
<tr>
<td>/ssb/accountDetailByTerm</td>
<td>Account Detail By Term</td>
</tr>
<tr>
<td>/ssb/accountInformation</td>
<td>Account Information</td>
</tr>
<tr>
<td>/ssb/accountSummary</td>
<td>Account Summary</td>
</tr>
<tr>
<td>/ssb/statementAndPaymentHistory</td>
<td>Statement and Payment History</td>
</tr>
</tbody>
</table>

Pages available for use with Proxy Management
What is Proxy Management?

By default, a proxy cannot view information about gender, registration notices (including academic standing), or holds on the Student Profile or 1098-T Tax Notifications pages. Pages that a proxy views do not include links to other pages to ensure a proxy cannot access unauthorized information.

<table>
<thead>
<tr>
<th>Page name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/ssb/financialAid/dashboard/federalShoppingSheet</td>
<td>College Financing Plan</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/home</td>
<td>Financial Aid Dashboard</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/listAwardHistoryDetails</td>
<td>Financial Aid Award History</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/listAwardLetterDetails</td>
<td>Financial Aid Award Offer</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/notifications</td>
<td>Financial Aid Notifications</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/resources</td>
<td>Financial Aid Resources</td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/studentAcademicProgress</td>
<td>Financial Aid Satisfactory Requirements</td>
</tr>
</tbody>
</table>

Note: These pages are not enabled when Ellucian delivers them, so you must create local copies of the pages that you want to provide access to and then enable them.
Proxy Management

Guest Authentication

• Requires technical assistance to update configuration.groovy file and redeploy Self Service

• Define whether proxy users can log into Self Service
  – StudentSelfService_configuration.groovy
    • guestAuthenticationEnabled = true
  – BannerGeneralSsb_configuration.groovy
    • guestAuthenticationEnabled = false

• Do not enable for both General and Student SSB at the same time
Proxy Management Options

- Proxy Access Option Type Validation page (GTVOTYP)
  - Define logging, profile, and other options that control a proxy's access
  - See documentation for list of options
  - Baseline delivered default values

- Article #000028614 - Why is the delete proxy option not showing/working in Proxy Access?
  - GTVOTYP > ENABLE_DELETE_AFTER_DAYS
  - Default is 99999. Set to 0 to allow student to delete proxy on same day. Set to 1 to allow delete after 1 day.
Proxy Management

Options

• Logging options
  – AUTHORIZATION_IN_HISTORY
    • Record authorization changes in history
    • Default = Y
  – LOGIN_IN_HISTORY
    • Record proxy login history
    • Default = Y
  – PAGE_DISPLAY_IN_HISTORY
    • Record display of page in history
    • Default = Y
Proxy Management Options

Profile options

- PROFILE_BIRTH_DATE
- PROFILE_CITY
- PROFILE_CNTY_CODE
- PROFILE_EMAIL_ADDRESS
- PROFILE_FIRST_NAME
- PROFILE_HOUSE_NUMBER
- PROFILE_LAST_NAME
- PROFILE_MI
- PROFILE_NAME_PREFIX
- PROFILE_NAME_SUFFIX
- PROFILE_NATN_CODE
- PROFILE_OPT_OUT_ADV_IND
- PROFILE_PHONE_AREA
- PROFILE_PHONE_COUNTRY
- PROFILE_PREF_FIRST_NAME
- PROFILE_REQUIRED
- PROFILE_SEX
- PROFILE_SSN
- PROFILE_STAT_CODE
- PROFILE_STREET_LINE1
- PROFILE_STREET_LINE2
- PROFILE_STREET_LINE3
- PROFILE_STREET_LINE4
- PROFILE_SURNAME_PREFIX
- PROFILE_ZIP

- PROFILE_PHONE_EXT
- PROFILE_PHONE_NUMBER
- PROFILE_PREF_FIRST_NAME
- PROFILE_REQUIRED
- PROFILE_SEX
- PROFILE_SSN
- PROFILE_STAT_CODE
- PROFILE_STREET_LINE1
- PROFILE_STREET_LINE2
- PROFILE_STREET_LINE3
- PROFILE_STREET_LINE4
- PROFILE_SURNAME_PREFIX
- PROFILE_ZIP
Proxy Management Options

Miscellaneous options

- ACCESS_WINDOW_DAYS
  - Default = 365
- ACTION_VALID_DAYS
  - Default = 5
- ENABLE_DELETE_AFTER_DAYS
  - Default = 99999
- ENABLE_DELETE_RELATIONSHIP
- ENABLE_PASSPHRASE
- ENABLE_RESET_PIN
- ENABLE_TAB_COMMUNICATION
- MAX_INVALID_LOGINS
  - Default = 3
- PAGE_LEVEL_AUTHORIZATION

- PIN_LENGTH_MINIMUM
  - Default = 8
- PIN_LIFETIME_DAYS
  - Default = 365
- PIN_VALIDATION_VIA_GUAPPRF
- PROXY_GIDM_PREFIX
- VERIFY_CANCEL_EMAIL_ACTION
- VERIFY_NEW_EMAIL_ACTION
- VERIFY_NEW_PROXY_NOA_ACTION
- VERIFY_PIN_RESET_NOA_ACTION
Proxy Management
Relationship + System + Menu + Page + Role

• Connect relationship code (GTVRETP) to system code (GERPRXY)
  – Example Relationship code = PARENT
  – System code = PROXY

• Create menu (GUASMNU) and format menu name “PROXY_ACCESS_<relationship code from GTVRETP>”
  – Example Relationship code = PARENT
  – Example Menu = PROXY_ACCESS_PARENT

• Put PROXYACCESS role on menu (GUASMNU)
• Set role (ROLE_SELFSERVICE-GUEST_BAN_DEFAULT_M) for pages (GUACONF)
• Add pages to menu (GUASMNU) and add PROXYACCESS role to pages
Proxy Management Relationship

- Proxy Access Relationship Type Validation Form (GTVRETP)
  - Create code for each type of user

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>System Required Ind</th>
<th>Create User</th>
<th>Create Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAA</td>
<td>Relationship not Selected</td>
<td>✓</td>
<td>BASELINE</td>
<td>09/07/2012</td>
</tr>
<tr>
<td>ADVISOR</td>
<td>Academic Advisor</td>
<td></td>
<td>BASELINE</td>
<td>09/07/2012</td>
</tr>
<tr>
<td>COACH</td>
<td>Coach or NCAA Representative</td>
<td></td>
<td>BASELINE</td>
<td>09/07/2012</td>
</tr>
<tr>
<td>EMPLOYER</td>
<td>Employer or Hiring Agency</td>
<td></td>
<td>BASELINE</td>
<td>09/07/2012</td>
</tr>
<tr>
<td>PARENT</td>
<td>Parent or Legal Guardian</td>
<td></td>
<td>BASELINE</td>
<td>09/07/2012</td>
</tr>
<tr>
<td>UNIV_ADMIN</td>
<td>Admin Global Proxy</td>
<td></td>
<td>BASELINE</td>
<td>09/07/2012</td>
</tr>
<tr>
<td>UNIV_FINAD</td>
<td>Financial Aid</td>
<td></td>
<td>CTAYLOR</td>
<td>05/10/2023</td>
</tr>
<tr>
<td>UNIV_REGISTRAR</td>
<td>Registrar</td>
<td></td>
<td>CTAYLOR</td>
<td>05/08/2023</td>
</tr>
</tbody>
</table>
Proxy Management
Relationship + System

• Proxy Access Data Option Rules Form (GERPRXY)
  – System Code = PROXY
  – Insert relationship type codes
  – Use Options tab to override GTVOTYP default values
Proxy Management

Relationship + System

DATA LOAD INFORMATION

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Load Activity Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVANCEMENT</td>
<td>Y</td>
<td>Banner Advancement</td>
</tr>
<tr>
<td>PERSON</td>
<td>Y</td>
<td>Banner General</td>
</tr>
<tr>
<td>PROXY</td>
<td>Y</td>
<td>Banner Proxy</td>
</tr>
</tbody>
</table>

OPTIONs INFORMATION

<table>
<thead>
<tr>
<th>Option Type</th>
<th>Override Value</th>
<th>System Default</th>
<th>Option Start</th>
<th>Option End</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCESS_WINDOW_DAYS</td>
<td>180</td>
<td>365</td>
<td>09/07/2012</td>
<td></td>
<td>Number of days that a proxy is allowed access</td>
</tr>
<tr>
<td>ADV_LOAD_Donor_CODE</td>
<td>PRNT</td>
<td>PRNT</td>
<td>09/07/2012</td>
<td></td>
<td>(Advancement Load) Donor category code (atvdo)</td>
</tr>
<tr>
<td>ADV_LOAD_XREF_CODE</td>
<td>PAR</td>
<td>PAR</td>
<td>09/07/2012</td>
<td></td>
<td>(Advancement Load) Relationship cross reference</td>
</tr>
</tbody>
</table>
Proxy Management

Email

- Banner Application Configurations page (GUACONF)
  - Application ID = **GENERAL_SS**
  - Configurations tab
    - `proxyAccessURL.useBanner9 = Y`

---

Enables Banner 9 Proxy Access in Banner 8 Proxy Management. The proxy login URL used in e-mail communications will be built as follows. When value is N, will be built from the REQUEST_PROTOCOL and HTTP_HOST CGI environment variables appended with the Proxy Access procedure. Otherwise, it is the configuration value defined in the `GENERALLECATION` configuration item appended with the appropriate Banner General SSB endpoint.
• Proxy Access Communication Type Validation (GTVCTYP)
• Letter Code Validation (GTVLETR)
• HTML Letter Rules (SOAELTL)
• HTML Letter Module Validation (STVELMT)
• Format HTML Letter Rules (SOAELTR)
• GOVELTR view contains data elements to be used in emails
  – See documentation for list of elements
• Communications sent due to **student** action

<table>
<thead>
<tr>
<th>CURRENT_AUTHORIZATIONS</th>
<th>Updated proxy access authorizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>DELETE_RELATIONSHIP</td>
<td>Proxy relationship deleted</td>
</tr>
<tr>
<td>NEW_PROXY_NOA</td>
<td>New proxy identity</td>
</tr>
<tr>
<td>PASSPHRASE</td>
<td>Proxy access passphrase</td>
</tr>
<tr>
<td>PIN_RESET_NOA</td>
<td>Send proxy password reset request</td>
</tr>
<tr>
<td>PIN_RESET_ACCESS_CODE</td>
<td>Proxy password reset confirmation</td>
</tr>
<tr>
<td>UPDATE_RELATIONSHIP</td>
<td>Proxy relationship updated</td>
</tr>
</tbody>
</table>
Proxy Management Email

- Communications sent due to **proxy** action

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CANCEL_EMAIL_NOA</td>
<td>Cancel updated proxy email address</td>
</tr>
<tr>
<td>NEW_EMAIL_NOA</td>
<td>Confirm updated proxy email address</td>
</tr>
<tr>
<td>PROFILE_CHANGE_CLR</td>
<td>Proxy profile updated</td>
</tr>
<tr>
<td>NEW_PROXY_ACCESS_CODE</td>
<td>New proxy confirmation</td>
</tr>
<tr>
<td>PIN_RESET_NOA</td>
<td>Send proxy password reset request</td>
</tr>
<tr>
<td>PIN_RESET_ACCESS_CODE</td>
<td>Proxy password reset confirmation</td>
</tr>
</tbody>
</table>
• Proxy Access Communication Rule Form (GERCOMM)
  – Enable communication types
  – System Code = PROXY
  – Check “Send e-mail?”
  – Set the system default sender email address on GUACONF > Application ID = GLOBAL > Self-Service Parameters tab > PROXY_ACCESS_EMAIL_FROM
Proxy Management
Page + Role

• Banner Self-Service Menu Maintenance page (GUASMNU)
  – Menu Setup tab
    • Copy/insert local versions of all pages to be added to menu
    • Module Code = PXY
    • Check “Enabled Indicator”
  – Roles tab
    • Role = PROXYACCESS
    • Use STUDENT or FINAID as appropriate
### Proxy Management

**Page + Role**

#### Menu Details

<table>
<thead>
<tr>
<th>Menu Name *</th>
<th>Menu Description *</th>
<th>Baseline/Local</th>
<th>Module Code *</th>
<th>Module Description</th>
<th>Comments</th>
<th>Enabled Indicator</th>
<th>Non SPA Allow</th>
</tr>
</thead>
<tbody>
<tr>
<td>/ssb/financialAid/dashboard/home</td>
<td>Financial Aid Dashboard</td>
<td>Baseline</td>
<td>PXY</td>
<td></td>
<td>PROXY_ACCESS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>/ssb/financialAid/dashboard/home</td>
<td>Financial Aid Dashboard</td>
<td>Local</td>
<td>PXY</td>
<td></td>
<td>PROXY_ACCESS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FINAID</td>
<td>Financial Aid user</td>
</tr>
<tr>
<td>PROXYACCESS</td>
<td>Proxy Access</td>
</tr>
<tr>
<td>PROXYGLOBALACCESS</td>
<td>Proxy Global Access</td>
</tr>
</tbody>
</table>
• Banner Application Configurations page (GUACONF)
  – Application ID = SSS
    • Application Pages tab
    • Page ID = every page available for proxy
    • Roles section
      – Verify/insert ROLE_SELFSERVICE-GUEST_BAN_DEFAULT_M
      – To temporarily hide page, without removing role, append “_HIDE” to end of role
### Proxy Management

#### Page + Role

![Proxy Management Screenshot]

**Application ID:** SSS  
**Application Pages:** Configurations, Self-Service Rules, Self-Service Parameters

### APPLICATIONS

Active filters:  
- Page ID: Academic Transcript  
- Status: unchecked

<table>
<thead>
<tr>
<th>Page ID</th>
<th>Page URL</th>
<th>Page Description</th>
<th>Status</th>
<th>Display Sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Transcript</td>
<td>/ssb/academicTranscript</td>
<td>Academic Transcript</td>
<td>✔️</td>
<td>41</td>
</tr>
</tbody>
</table>

- 1 of 1 entries
- **Record 1 of 1**

### ROLES

<table>
<thead>
<tr>
<th>Page ID</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Transcript</td>
<td>ROLE_SELFSERVICE-FACULTY_BAN_DEFAULT_M</td>
</tr>
<tr>
<td>Academic Transcript</td>
<td>ROLE_SELFSERVICE-GUEST_BAN_DEFAULT_M</td>
</tr>
<tr>
<td>Academic Transcript</td>
<td>ROLE_SELFSERVICE-PROXYGLOBALACCESS_BAN_DEFAULT_M</td>
</tr>
<tr>
<td>Academic Transcript</td>
<td>ROLE_SELFSERVICE-STUDENT_BAN_DEFAULT_M</td>
</tr>
</tbody>
</table>

- 1 of 1 entries
- **Record 2 of 4**

---

*UNIVERSITY SYSTEM OF GEORGIA*
Proxy Management
Page + Role

• Banner Application Configurations page (GUACONF)
  – Application ID = SSS
    • Configurations tab
    • Configuration Value
      – Add “Proxy” to allow proxy access to specific page element
      – Remove “Proxy” to prevent process access to specific page element
    • See documentation for list of elements
### Proxy Management

#### Page + Role

---

**Application ID:** SSS  StudentSelfService

<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>all.bicinformation.emergencyContact.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, Proxy, GlobalProxy</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.email.view</td>
<td>string</td>
<td>Profile</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.email.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, Faculty, FacultyOverride...</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.telephone.view</td>
<td>string</td>
<td>Profile</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.telephone.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, Faculty, FacultyOverride...</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.gender.view</td>
<td>string</td>
<td>Profile</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.gender.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, GlobalProxy</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.birthDate.view</td>
<td>string</td>
<td>Profile</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.birthDate.roles</td>
<td>string</td>
<td>Advisor, AdvisorOverride, FacultyAdvisor, Student, Proxy, GlobalProxy</td>
<td></td>
</tr>
<tr>
<td>all.bicinformation.newEthnicity.view</td>
<td>string</td>
<td>Profile</td>
<td></td>
</tr>
</tbody>
</table>

---

**Record 69 of 298**

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**Page 83**
Proxy Management
Page + Role

• Banner Application Configurations page (GUACONF)
  – Application ID = **BAN9_PROXY**
    • Configurations tab
    • Configuration Value
      – Add “PROXY” to allow proxy access to specific page element
      – Remove “PROXY” to prevent process access to specific page element
    • See documentation for list of elements
### Proxy Management

**Page + Role**

**Application ID:** BAN9_PROXY  
Banner 9 Proxy Access settings

<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>proxyAccessURL.LOCATION</td>
<td>string</td>
<td><a href="https://t1997.gabest.usg.edu/StudentSelfService/">https://t1997.gabest.usg.edu/StudentSelfService/</a></td>
<td></td>
</tr>
<tr>
<td>globalProxyAccessURL.STUDENT.LOCATION</td>
<td>string</td>
<td><a href="https://t1997.gabest.usg.edu/StudentSelfService/">https://t1997.gabest.usg.edu/StudentSelfService/</a></td>
<td></td>
</tr>
<tr>
<td>financialAid.awardAcpTabInd</td>
<td>list</td>
<td>[]</td>
<td></td>
</tr>
<tr>
<td>financialAid.awardinfoInd</td>
<td>list</td>
<td>[]</td>
<td></td>
</tr>
<tr>
<td>financialAid.coInd</td>
<td>list</td>
<td>&quot;[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]&quot;</td>
<td></td>
</tr>
<tr>
<td>financialAid.fundZeroAmlnd</td>
<td>list</td>
<td>&quot;[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]&quot;</td>
<td></td>
</tr>
<tr>
<td>financialAid.housingStatusInd</td>
<td>list</td>
<td>&quot;[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]&quot;</td>
<td></td>
</tr>
<tr>
<td>financialAid.needCalcInd</td>
<td>list</td>
<td>&quot;[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]&quot;</td>
<td></td>
</tr>
<tr>
<td>financialAid.resourceinfoInd</td>
<td>list</td>
<td>&quot;[&quot;PROXY&quot;, &quot;GLOBAL_PROXY&quot;]&quot;</td>
<td></td>
</tr>
<tr>
<td>financialAid.resourceSubmitinfoInd</td>
<td>list</td>
<td>[]</td>
<td></td>
</tr>
</tbody>
</table>

Record 17 of 28
Proxy Management
Menu + Role

• Banner Self-Service Menu Maintenance page (GUASMNU)
  – Menu Setup tab
    • Create menu for each relationship
    • Format menu name
      “PROXY_ACCESS_<relationship code from GTVRETP>”
        – Example Relationship code = PARENT
        – Example Menu = PROXY_ACCESS_PARENT
    • Module Code = PXY
    • Check “Enabled Indicator”
  – Roles tab
    • Role = PROXYACCESS
• Banner Self-Service Menu Maintenance page (GUASMNU)
  – Menu Setup tab > Menu Items Details section
    • Add pages to menu
    • URL = page name (ex. /ssb/academicTranscript)
    • Link Text
    • Check “Enabled” indicator
Proxy Management
User

• Business Rules page (GORRRSQL)
  – Process = SSB_ROLES
  – Rule = SSB_ROLE_PROXYMGMT
  – Review baseline delivered rules, edit as needed, or create new rules to define population
  – Click “Validate SQL” button and check “Active” indicator for desired population rule

• Optional proxy list
  – Process = PROXY_ACCESS
  – Rule = PROXYMGMT_ADD_LIST
  – Display potential proxies to add/select
Proxy Management User
• **Access Proxy Management**
  - Student logs into Banner General Self-Service
  - Click on Proxy Management
Live Demo

- Click on ‘Add New’ button
• Establish a New Proxy
  - Enter the following: First Name, Last Name, E-mail, Relationship Type, Start Date, and End Date
Live Demo

• Establish a New Proxy
  - Enter the appropriate authorizations
  - Click submit once complete
Live Demo

- Confirm Proxy Access

[Image of Proxy Management screen]

The proxy has been successfully created.

Proxy Management

Miguel Morales
miguel.morales@usg.edu
Inactive

[Options to add new, edit, and delete]
Live Demo

- **Edit Proxy Access**

  - Click on the Pencil icon
- **Example Emails to Proxy**
- New proxy confirmation
- New proxy identity
- Updated proxy relationship
Live Demo

- **Proxy Login**
  - Navigate to URL found in email titled “New proxy identity”
  - Enter password token found in email titled “New proxy confirmation”
  - User will select a new password
- **Proxy Profile**
- Complete any remaining personal information fields

<table>
<thead>
<tr>
<th>Personal Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salutation</strong></td>
<td><strong>First Name</strong></td>
</tr>
<tr>
<td><strong>Last Name</strong></td>
<td><strong>Name Suffix</strong></td>
</tr>
<tr>
<td><strong>Morrone</strong></td>
<td><strong>Name Suffix</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home E-Mail Address</strong></td>
<td><strong>Phone Area Code</strong></td>
</tr>
<tr>
<td><a href="mailto:miguel.morrone@ug.edu">miguel.morrone@ug.edu</a></td>
<td><strong>Phone Area Code</strong></td>
</tr>
<tr>
<td><strong>Phone Extension</strong></td>
<td><strong>Phone Extension</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mailing Address Line 1</strong></td>
<td><strong>Mailing Address Line 2</strong></td>
</tr>
<tr>
<td><strong>City</strong></td>
<td><strong>State</strong></td>
</tr>
<tr>
<td><strong>City</strong></td>
<td><strong>State</strong></td>
</tr>
<tr>
<td><strong>Nation</strong></td>
<td><strong>Nation</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Info</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td><strong>Birth Date</strong></td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td><strong>Birth Date</strong></td>
</tr>
</tbody>
</table>
• **Verify Successful Authorization**

Hello Miguel Morales,

You've been authorized to view content for the student(s) below. Click each tile to select the page you wish to view.

- **Proxy Personal Information**
  View/Update Proxy Personal Information.

- **I am a proxy for Cindy Taylor**
  Select to view
• View Proxy Access

- Select options via dropdown menu
Live Demo

- Proxy Access Example – Student Profile

I am a proxy for Cindy Taylor
Ask your peers

• Ask your peers
  – Helpful hints
  – Lessons learned

• Self-reported implementation status
  – Banner 9 Implementation Grid
• 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 SSB Training Opportunities

All previous SSB Train The Trainer Sessions can be found on the GeorgiaBEST Website Homepage as well as under the Webcasts and Training Tab of the Banner 9 Page:

- Student Registration
- Page Builder
- Faculty Services
- Accounts Receivable
- Communication Management
- Student Services
- Action Item Processing