Train the Trainer:
Implementing Self-Service Banner 9
Student Services
April 2023
Agenda

- When should you implement 9.x SSB?
- How to get help?
- Where is the documentation?
- What’s new or different?
- Live Demo
- 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 for at least 12 months beginning July 1, 2022
    – Continue to receive regulatory and severity 1 change request updates, including security fixes
• From Ellucian: Update on Banner 8 Self-Service Maintenance Support
  – Maintenance Support through at least March 31, 2024
• Don’t wait for Sustaining Support
  – No releases of any kind, including security fixes
When should you implement 9.x SSB?

Summary of Support Statuses

<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>
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<tr>
<td>Ability to add a low severity change request</td>
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<tr>
<td>Additional enhancements to the product are released</td>
<td>•</td>
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<tr>
<td>New releases and related documentation</td>
<td>•</td>
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</tr>
<tr>
<td>New hot fix(es) or updates for severity 1 issues</td>
<td>•</td>
<td>•</td>
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<td></td>
</tr>
<tr>
<td>Regulatory updates</td>
<td>•</td>
<td>•</td>
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<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>
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</tr>
<tr>
<td>Access to previously supplied hot fix(es) 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>
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</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?
How to get help?

• ITS Helpdesk ticket for GeorgiaBEST team
• 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
## Banner Student Self-Service, installation

Updated: August 19, 2021

You can manually complete the entire Student Self-Service installation or you can streamline the process by using Ellucian Solution Manager (ESM) to complete most of the installation tasks. With either approach, you need to manually set up application-specific configurations.

The following table lists the high-level installation and configuration tasks and identifies which tasks you need to complete based on whether you manually install or use ESM to install. Review the table to identify which sections of the installation content you need to reference during the installation process. If the ESM column contains a dash, that means that ESM automatically completes that task; you do not need to manually complete it.

<table>
<thead>
<tr>
<th>Installation task</th>
<th>Description</th>
<th>Manual</th>
<th>ESM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before you get started</td>
<td>Verify that you have required hardware and third party software, configure Application Navigator and update themes.</td>
<td>X</td>
<td>-</td>
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<tr>
<td>Upgrade the database</td>
<td>Upgrade to the required Banner Common Database</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Upgrade release, verify that you have installed required Ellucian prerequisite releases, and verify that user accounts connect to the database as expected.</td>
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</tr>
<tr>
<td>Undeploy existing application</td>
<td>Remove the previously installed Self-Service application version on either Tomcat or WebLogic.</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td>Customize the WAR file</td>
<td>Configure settings shared by all Banner Self-Service applications and application-specific settings in groovy and messages.properties files and on GUACONFIG.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Regenerate the WAR file</td>
<td>Regenerate the WAR file to include your customized configurations.</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td>Configure the web application server and deploy the WAR file</td>
<td>Configure the Tomcat or WebLogic server and deploy the WAR file that includes your customized configurations.</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

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### Security and user access

Updated: August 27, 2020

Access to Advising Student Profile and Student Profile varies depending on a user’s role. You can set up different access for advisors, students, faculty members, and proxies.

Note: EMMATHTY is required when the SPRIDEN ID is associated with the Oracle ID.

### Set up advisor access

Updated: August 27, 2020

Set up advisor access is available.

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### Set up and Use the Application

Updated: August 27, 2020

This section describes how to set up the Student Profile pages and some settings that apply to either pages.

You can set up the following items:

- Security
- Personas
- Advising/student relationship
- GTYSQAX rules
- Default term
- Faculty and Advisor Cards
- Student Card
- Student notes
- Release holds
- Name display on all pages
- Name search on the Adviser Search page
- Info Text

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Set up and Use the Application
Where is the documentation?

- **Article 000052084 - Banner Student - Student Self-Service Master Article**

This is the Master Article Banner Student - Student Self-Service. More **coming soon!**

**Articles for Banner Student - Student Self-Service**

- Article 000039330: Banner 9 Student Self-Service - Consolidated Banner 9 apps and Navigation
- Article 000050782: Article # 000050782 - Banner 9 and Google Analytics - Information
- Article 000043012: Faculty user cannot see the Faculty Menu in Self Service
- Article 000021841: 1-29QIEW: The email class or email all advisees link does not work for large lists on some email clients.
- Article 000048403: Class List email button does not bring up email client
- Article 000036066: We have applied Banner Student Self-Service and Advising Student Profile 9.2 and do not know what is required in web tailor to replace the "Fully Qualified URL for View Grades Page" in the URL field.
- Article 000043866: Banner 9 Steps to Modify the Banner 9 Self Service Landing Page Dashboard to include URLs
Where is the documentation?

- **KB000500383 - Banner Self-Service 8 (SSB8x) to 9 (SSB9x) FAQ**
  - Includes list of Web Tailor updates (screenshot is not full content of article)

What about Web Tailor and all the functions it provided in 8? What has replaced it in 9?

Listed below are the current Banner Self-Service Web Tailor 8 menu options and how they have transformed in Self-Service 9. Please note that Banner Self-Service 9 has a different technology stack and there will be variations in what existed in 8 with what is now available in 9.

- **Web Menus and Procedures:** Web Menus were moved to Banner Self-Service Menu Maintenance (GUASMNU). Procedures were replaced by Page Builder.
- **Menu Items:** Menu Items were moved to Banner Self-Service Menu Maintenance (GUASMNU).
- **Information Text:** Info text can be accommodated on Informational Messages (GUAINFO) and Interactive Translation Manager (GMATRAN).
- **User Roles:** User Roles are now found on Maintain Self-Service User Roles (GUAUSRL).
- **Web Rules:** Web Rules are located on Banner Applications Configurations (GUACONF) under GLOBAL application name.
- **Web Modules:** This module is not applicable in 9. Each application will control the creation of modules within their specific self-service applications as needed. Theme Editor replaces the css feature and other features are not applicable in 9.
- **Global User Interface Settings:** This module has been replaced by Theme Editor in 9.
- **WebTailor Parameters:** Institutions that need to add custom configurations should be leveraging Banner Applications Configurations (GUACONF) under GLOBAL application name.
- **Graphic Elements:** For background image, logo, and favicon, the Theme Editor tool in 9 can be used. The other items that were in Graphic Elements were not moved because they are no longer applicable in 9. For example, there were images for
Where is the documentation?

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

![Banner 9 Self-Service Guided Adoption](image-url)
Where is the documentation?

- **Article 000046034 - Banner 9 Self Service Product Links.( fully qualified url)**
  - Setup links for all the Banner 9 Self-Servivce modules

```plaintext
Article # 000046034-Banner 9 Self Service Product Links.( fully qualified url)
2mo ago · 2935 Views · ★★★★☆

Article # 000046034 - Banner 9 Self Service Product Links.(fully qualified url)
Community Thread customer_center?id=community_question&sys_id=34bacded876781146c71ca27dab35b6b
or customer_center?id=community_question&sys_id=c3a071e9872f81146c71ca27dab35c8

MEP - The below may be different depending on your versions.
If you use MEP, you have to specify "?mepCode=XXXX" at the end of the URLs (at least with SAML) otherwise you'll get the "flashy screen of death" and DoS your app servers. (Exception is the AIP list, it needs to go .../aip/?
mepCode=XXXX#/list)

Please keep in mind this list may not be complete.
```
Welcome to the Banner 9 Self-Service Adoption Channel

Banner 9 Self-Service Article Resources
4 page pdf

Banner Student Self-Service Configuration Guide
372 page pdf with instructions

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)

Edit the Self-Service Menu Tree (Banner SS)
9 minute video on the use of menus in Banner 9

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

Click here to go to the Adoption Channel
# 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>
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</thead>
<tbody>
<tr>
<td>Display Audit for Banner Self-Service Logins</td>
<td>GUACONF</td>
<td>Video</td>
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<tr>
<td>Graphic Customizations</td>
<td>Theme Editor</td>
<td>Video</td>
</tr>
<tr>
<td>Information Text</td>
<td>GUAINFO</td>
<td>Video</td>
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<tr>
<td>User Roles</td>
<td>GUAUSRL</td>
<td>Video</td>
</tr>
<tr>
<td>Web Menus and Procedures</td>
<td>GUASMNU</td>
<td>Videos</td>
</tr>
<tr>
<td>Web Rules and Parameters</td>
<td>GUACONF</td>
<td>Video</td>
</tr>
<tr>
<td>Web Tailor Overrides</td>
<td>Configure Page Components Tool</td>
<td>Documentation</td>
</tr>
</tbody>
</table>
What’s new or different?

- More intuitive and mobile friendly design
- Single landing page for Student Self-Service
- Improved search capabilities
- New Student Profile
- Simple view of holds and release of holds
What’s new or different?

• Functional configurations
  – Overall Page and Field Configuration page (SOAWSCR)
    • Control what displays for each persona / page / term
  – Banner Applications Configurations page (GUACONF)
  – Information Text Editor page (GUAINFO)
  – Banner Self-Service Menu Maintenance page (GUASMNU)
What’s new or different?
https://server.school.edu/StudentSelfService/ssb/studentCommonDashboard
Filter on the Message Label of STUDENT.LAND% and Locale of en_US
Copy all values to Local and make edits in the Message column
Persona Selection

If user has multiple personas, may be required to select one when accessing specific pages

Please select a role*

Your account has been assigned multiple roles. How would you like to begin?

- Student
- Faculty
- Advisor
- Faculty And Advisor

*Remember you can switch between roles at any time.
Live Demo

Let’s see how Self-Service Banner 9 Student works!
Hello John Broz,

Information Text Editor (GUAINFO) Filter criteria/Page Name: STUDENTLANDINGPAGE Locale: en_US. This is the entry page for Banner Student. From here, you can navigate to the following pages using the Banner menu on the header (Alt+M) depending on your role at the institution:

**Personal Info**
- My Personal Information
- Registration
- Student Profile
- Student Information Status Summary

**Student Accounts**
- Account Summary 9x
- Account Detail For Term 9x
- Tax Notification (1098-T) 9x
- Account Information 9x
- Statement and Payment History 9x
- Payment and Deposit Processing 9x
- Nelnet

**Financial Aid**
- Financial Aid

**Contact Information:**
Office of Registrar - t1997reg@t1997.edu
Office of Student Accounts - stuacctts@t1997.edu
Office of Financial Aid - finaid@t1997.edu

**Announcements**

**SPRING TERM 2023 - Fee Payment Deadlines**
All fees for SPRING 2023 Term classes that are held between (January 10 - May 9) are due by January 6, 2023. An example: if you have a class that begins January 10th and a class that begins March 3rd, then both classes must be paid for by January 6th. For Payment Options, click here: [http://www.t1997.edu/student-account/pay-student-fees](http://www.t1997.edu/student-account/pay-student-fees).

**SPRING 2023 - Refunds**
Effective July 1, 2018 T1997 partnered with ITSMobile to issue refunds. Spring 2023 refunds will be released on February 25, 2023, if you have questions about
Configure Faculty access on SOAFACS for the DISPLAYPROFILE process
Configure Advisor and Faculty access on SOAFACS for the DISPLAYGRADES process
Configure Advisor Access by creating an ADVISING code on GTVSYST
Configure Advisor Access by creating an ADVISEE_SEARCH_ADVR_REQ option code on GTVOTYP
Configure roles that can access the Student Contact Card in GUACONF > Application ID: SSS > Configurations tab. Filter on the Configuration Name of all.studentcard.%
Setup the following Roles:

- **Advisor** - user is only an advisor
- **AdvisorOverride** - user is an Advisor or FacultyAdvisor and override is selected on SIAINST
- **Faculty** - user is a member of the faculty
- **FacultyAdvisor** - user is both a member of the faculty and an advisor
- **FacultyOverride** - user is a faculty and override is selected in SIAINST. FacultyOverride without AdvisorOverride is not supported in some self-service applications.
- **Student** – user is a Student
Configure roles that can access the Faculty Contact Card in GUACONF > Application ID: SSS > Configurations tab. Filter on the Configuration Name of all.facultycard.%
Student Profile

Setup the following on GTVSDAX:

- PREREQCHK
- DISPALTPIN
- REGADVISEE
- SHOWUNROLL
- EMAILDEL
- PHOTOS (SS CLASS LIST group)
- WEBTRMDTE
- WEBDETCODE
Verify that the STUDENT_PROFILE code exists on GTVSQPR
Verify that the STUDENTPROFILE_DEFAULT_TERM code exists on GTVSQRU
Verify that the STUDENT_PROFILE process and STUDENT_PROFILE_DEFAULT_TERM business rule is set up on GORRSQL.
Confirm that ADDR_OF and ADDR_CP exists on GTVDIRO for Faculty and Student addresses
Confirm that TELE_OF and TELE_CP exists on GTVDIRO for Faculty and Student telephone numbers
Confirm that ADDR_OF and ADDR_CP exists on GOADIRO for Faculty and Student addresses

<table>
<thead>
<tr>
<th>Directory Item</th>
<th>Description</th>
<th>Display in Directory</th>
<th>Item Type</th>
<th>Display Sequence</th>
<th>Display in Profile</th>
<th>Update in Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDR_PR</td>
<td>Permanent Address</td>
<td>All</td>
<td>Address</td>
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<td>ADDR_CP</td>
<td>Campus Address</td>
<td>Student</td>
<td>Address</td>
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<tr>
<td>ADDR_OF</td>
<td>Office Address</td>
<td>Employee</td>
<td>Address</td>
<td>6</td>
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<td>Home Address</td>
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Addresses and Telephones

<table>
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<tr>
<th>Address Type</th>
<th>Description</th>
<th>Telephone Type</th>
<th>Description</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDR_PR</td>
<td>Permanent Address</td>
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</tr>
</tbody>
</table>
Confirm that TELE_OF and TELE_CP exists on GOADIRO for Faculty and Student telephone numbers

<table>
<thead>
<tr>
<th>Directory Item</th>
<th>Directory Item Description</th>
<th>Display in Directory</th>
<th>Item Type</th>
<th>Display Sequence</th>
<th>Display in Profile</th>
<th>Update in Profile</th>
</tr>
</thead>
<tbody>
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<td>Permanent Telephone</td>
<td>All</td>
<td>Telephone</td>
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<tr>
<td>TELE_CP</td>
<td>Campus Telephone</td>
<td>Student</td>
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<td>✓</td>
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<td>TELE_OF</td>
<td>Office Telephone</td>
<td>Employee</td>
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**Addresses and Telephones**

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<th>Description</th>
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<tr>
<td></td>
<td>TELE_PR</td>
<td>Permanent Telephone</td>
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</table>
Configure roles that can view the student holds in GUACONF > Application ID: SSS > Configurations tab. Filter on the Configuration Name of all.curriculum.holds%
Configure roles that can release the student holds in GUACONF > Application ID: SSS > Configurations tab. Filter on the Configuration Name of all.studentnotes.releaseholdnote%
Confirm that DISPLAYHOLDS and RELEASEHOLDS exist on STVPROC
Confirm that DISPLAYHOLDS and RELEASEHOLDS exist on SOAFACS
Confirm that the hold types that need to be released have the web indicator checked on STVHLDD.

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<tr>
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<th>Graduation</th>
<th>Grade</th>
<th>A/R</th>
<th>Application</th>
<th>Compliance</th>
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<td>CA</td>
<td>Campus Safety</td>
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<td>CC</td>
<td>Core Area A Incomplete</td>
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<td>CE</td>
<td>CPC-English</td>
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<td>CF</td>
<td>CPC-Foreign Language</td>
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</table>
Confirm that the hold types that need to be released exist on SOAPHLD

![Table showing release hold types](image)
Configure Release Hold Comments by creating an STUDENT_PROFILE code on GTVSYST

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>System Required Ind</th>
<th>Create Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>STUDENT_PROFILE</td>
<td>Student Profile codes</td>
<td>False</td>
<td>04/12/2023</td>
</tr>
</tbody>
</table>
Configure Release Hold comments by creating an REQUIRE_RELEASE_HOLD_COMMENT option code on GTVOTYP
Student Profile

Customize how names are displayed on GUANDSP
Student Profile

View Students’ status

Student Profile - Robin McLaurin Williams (913256509)

Curriculum, Hours & GPA

<table>
<thead>
<tr>
<th>Degree</th>
<th>Study Path</th>
<th>Level</th>
<th>Program</th>
<th>Concentration</th>
<th>Major</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor of Arts</td>
<td>Not Provided</td>
<td>Undergraduate - Semester</td>
<td>BA in DA-Performance Emphasis</td>
<td>Not Provided</td>
<td>College of Arts and Sciences</td>
<td>Dramatic Art-Perform Emphasis</td>
</tr>
</tbody>
</table>

Registered Courses

Not Registered

- Total Hours: [ ]
- Registered Hours: [ ]
- Billing Hours: [ ]
- CEU Hours: [ ]
- Min Hours: [ ]
- Max Hours: [ ]
This includes registration notices and holds

- **Overall Academic Standing**: Good Standing, Permits Registration
- **Student Status**: Active, Permits Registration
- **Enrollment Status**: Permits Registration
- **Time Tickets**: Not Provided - Student may register at any time.

**Releasable Holds**
- **Advisement Necessary**
  - From Date: 05/17/2021
  - To Date: 12/31/2023
  - Processes Affected: Registration

- **Beginning Freshman**
  - Originator: First Year Experience
  - Reason: For Changes see FYE Dept
  - From Date: 12/15/2021
  - To Date: 12/31/2023
  - Processes Affected: Registration

**View Only Holds**
- **Housing Deposit**
  - From Date: 02/09/2021
  - To Date: 12/31/2023
  - Processes Affected: Registration, Transcript, Graduation, Accounts Receivable
Live Demo
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 & 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

- Proposed schedule:

<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>
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<tr>
<td>Faculty Self-Service</td>
<td>Available on our Website</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>Available on our Website</td>
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<tr>
<td>Communication Management</td>
<td>Available on our Website</td>
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<tr>
<td>Student Self-Service</td>
<td>Wednesday, April 19, 2023</td>
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<tr>
<td>Action Item Processing</td>
<td>Wednesday, May 3, 2023</td>
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<tr>
<td>Proxy Management</td>
<td>Wednesday, May 17, 2023</td>
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