



# Implementing Self-Service 9x

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# Agenda

**1** Where we are today

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**2** Terminology

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**3** Shared Aspects of SSB 9x

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**4** Applications

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**5** Summary

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# Where we are today

# Introduction

- **SSB9 is not just a lift and shift from SSB8**
- **New “concepts” in configuration mean that some of the config is technical and some of the config is functional and some of the config is still Web Tailor**

# Banner 9 Self-Service Available Today

## Student

- Class Roster
- View Grades
- Student Profile
- Advisor Student Profile
- Student Attendance Tracking View
- Student Card
- Drop Roster
- Financial Aid
- Student Aid
- Accounts Receivable

## Registration

- Student Registration
- Class Schedule
- Course Catalog
- Registration Status
- Plan Ahead

## Faculty

- Attendance Tracking
- Final and Midterm Grades
- Incomplete grades
- Electronic gradebook
- Student Academic Review

## General

- Personal Information
- Direct Deposit
- Action Item Processing
- Communication Management
- Proxy Access – Proxy Experience
- Proxy Access – Student Experience

## Finance

- My Finance
- My Requisitions
- My Finance Query
- My Journals

## Human Resources

- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution
- Time Entry & Leave Management

# Banner 9 Self-Service Available—Next 12 Months

## Student

- Class Roster
- View Grades
- Student Profile
- Advisor Student Profile
- Student Attendance Tracking View
- Student Card
- Drop Roster
- Financial Aid
- Student Aid
- Accounts Receivable
- **Degree Evaluation**
- **Enrollment Verification**
- **Graduation Application**
- **Transcript Request**

## Registration

- Student Registration
- Class Schedule
- Course Catalog
- Registration Status
- Plan Ahead

## Faculty

- Attendance Tracking
- Final and Midterm Grades
- Incomplete grades
- Electronic gradebook
- Student Academic Review
- **Schedule View**
- **Faculty Feedback**

## General

- Personal Information
- Direct Deposit
- Action Item Processing
- Communication Management
- Proxy Access – Proxy Experience
- Proxy Access – Student Experience

## Finance

- My Finance
- My Requisitions
- My Finance Query
- My Journals
- **My Approvals**
- **My Budget**
- **My Purchase Orders**

## Human Resources

- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution
- Time Entry & Leave Management
- **Personnel Actions**
- **Benefits Administration**
- **Salary Planner**
- **Faculty Load and Compensation**
- **Regulatory Tax Pages**
- **Campus Directory**

# Terminology



# Terminology

**Consolidated Application – single deployable war file that contains modules**

**Faculty SSB has Faculty Grade Entry, Class Lists, Attendance Tracking, Drop Rosters, and Advising Profile**

**WAR file – technical file that houses critical config items that frequently require a Tomcat Restart to take effect**

**Each Application has its own WAR file including Application Navigator**

**Properties File – an application might have multiple properties files which controls labels and individual elements that display in the components of that application (including message files)**

**Role/Persona – near identical to Web Tailor Roles – used in WAR file and Property files to control which user sees what pieces**

# Shared Aspects of SSB 9x

# SSB8 and SSB9 playing together

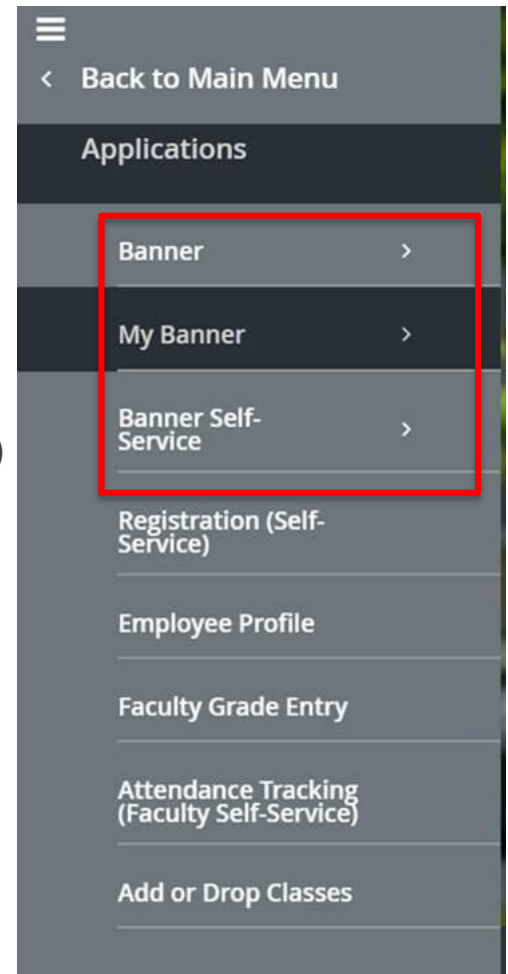
**You can use Application Navigator to have a seamless experience between Banner 8 and Banner 9 running concurrently.**

- Application Navigator is required to deploy Banner 9.x Administrative Applications.
- Application Navigator requires Single Sign On to be configured via EIS Ethos Identity Server or a CAS server.
- Banner 9.x applications supports Single Sign On natively but Banner INB does not. For Application Navigator to seamlessly move between Banner 9.x Admin pages and Banner 8 INB, Single Sign On to Banner 8 must be in place.
- Single Sign On to Banner 8 requires SSO Manager as a gateway into INB and SSB.

# Getting to SSB

## The Banner, My Banner, and Banner Self Service menus are part of the App Nav install settings

- Banner Menu tree is controlled by Menu Maintenance page (GUTGMNU)
- My Banner is controlled by My Banner Maintenance (GUAPMNU) page and can be copied to other users via My Banner Maintenance and Copy (GUTPMNU) page
- Banner Self Service Menu Tree is the Web Tailor menu items
- Any additional links can be configured on General User Preferences Maintenance (GUAUPRF) “My Links” tab or the App Nav properties file
- Banner Self-Service: set the “ssbEnabled” parameter to true in Application Navigator Groovy file.



# Theme Editor

**“Replaces” stylesheets and controls color schemes**

**Incorporate School Logo into theme**

- Each application needs to be associated to a Theme (in the WAR file)
- Strongly recommend creating themes for each environment
- PROD = School Colors
- TEST = “green” colors

# Theme Editor

Theme Editor

Theme name

Primary color

Secondary color

Accent color

Logo URL

Favicon URL

Preview

Bread Crumb • Page Title

Page Title

Do you want to save your changes?

Cancel No Yes

Active Tab Default Tab

Sample Label

Pending

Sample Label

Select One

Approved

Tertiary Secondary Primary

# Roles/Persona

## Near Identical to WebTailor Roles

## Used to control how text shows to an SSB User

- Can be Used in WAR and Property Files
  - Student Profile can show different links to different Roles/Persona
- Registration related pages are controlled using Overall Page and Field Configuration (SOAWSCR)
- Determine which fields will display on any given Registration page by Persona and term effective logic
- Display text to different Personas differently

Code *	Description *
FACULTYADVISOR	Advisor
FACULTYBOTH	Faculty And Advisor
FACULTYINSTRUCTOR	Faculty
PROXY	Proxy
REGISTRAR	Registrar
STUDENT	Student
WEBUSER	Anonymous

# Info Text

## In SSB8, Info Text was controlled per WebTailor info text per page

- Since there were different versions of pages for Faculty/Advisor and Student, who could sort of control what text showed for which population

## In SSB9, most info text and “error messages” can be controlled via Information Text Editor (GUAINFO) page

- Text can be edited in any of the supported languages
- Just like WebTailor, you Copy the existing baseline text, thus making a Local Copy, which you then edit (use Ctrl E in Message field to open a window to make it easier to edit the whole message)
- You can make text unique to any TWTVROLE role, not just Persona
- Some messages are only in Message Property files – but we are working on that



# Information Text Editor (GUAINFO)

Also has text for Ethnic/Race Survey and Terms of Usage acceptance pages (oddly, does not have Veteran Status or Disability Survey)

Information Text Editor GUAINFO 9.3.6 (TEST)

INFORMATIONAL MESSAGES

Page Name *	Message Label *	Source Indicator *	Audience *	Description ▲	Locale *
ADVISEELISTING	ADVISEE.LISTING.HEADER	Baseline	FACULTY	Faculty	ar
ADVISEELISTING	ADVISEE.LISTING.HEADER	Local	<input type="text" value="FACULTY"/>	Faculty	ar

ADD RETRIEVE RELATED

Insert Delete

Locale *	Sequence Number *	Text Type *	Message
ar	1	Panel	<STRONG>قائمة الطلاب الذين تحت الإشراف</STRONG> <HR/> 
ar	1	Panel	<STRONG>قائمة الطلاب الذين تحت الإشراف</STRONG> <HR/> 
en_AU	1	Panel	<STRONG>Advisee Listing</STRONG> <HR/> 

# Common Landing Pages

In SSB8, General menu was HOME and everyone started at home

**SSB9 is sort of Homeless. Instead there are Common Landing pages for each Module**

- General Person
- Student including Financial Aid
- Faculty
- Employee
- Finance
- Registration

# Banner Applications Configurations (GUACONF)

Holds configurations and does not require redeployment of the application when changes are made

ellucian Banner Applications Configurations GUACONF 9.3.13 (SMPL) Start Over

Application ID: GENERAL\_SS BannerGeneralSsb

Application Pages Configurations

APPLICATIONS Insert Delete Copy Filter

Page ID	Page URL	Page Description	Status	Display Sequence
DirectDepositBase	/ssb/directDeposit/**	Landing page	<input checked="" type="checkbox"/>	1
DirectDepositUpdate	/ssb/UpdateAccount/**	Update direct deposi...	<input checked="" type="checkbox"/>	2
DirectDepositList	/ssb/accountListing/**	View direct deposit a...	<input checked="" type="checkbox"/>	3
DirectDepositConfig	/ssb/DirectDepositConfiguration/**	Get direct deposit co...	<input checked="" type="checkbox"/>	4

1 of 1 Per Page 10 Record 1 of 4

ROLES Insert Delete Copy Filter

Page ID	Role
DirectDepositBase	ROLE_SELFSERVICE-EMPLOYEE_BAN_DEFAULT_M
DirectDepositBase	ROLE_SELFSERVICE-STUDENT_BAN_DEFAULT_M

1 of 1 Per Page 10 Record 1 of 2

# SSB Menu

## In SSB8, controlled per Web Tailor Menu Items

- Two options to hide menu links – remove the link from the menu OR disable the package completely and it's corresponding links would not show

## In SSB9, controlled per Web Tailor Menu Items

- HOWEVER, SSB9 only goes by menu links and doesn't reference enabled/disabled packages.
- You will want to add the SSB9 packages to your existing menu tree using WebTailor. Potential recommendation to resort the menu so the SSB9 pieces are on the top.

# Photos

The following image file formats are supported: - .gif - .bmp - .jpg - .png

The preferred standard for images is a .jpg file.

The No Photo Available image is a .png file due to the art used in the graphic.

- Remember to maintain a square aspect ratio for all images.
- Establish a maximum resolution of 200 pixels by 200 pixels.



In Banner, it is possible for student IDs to begin with numbers. However, some file systems require that files begin with a letter instead of a number.

To ensure that a student's photograph can be displayed on all systems, it is required that all student picture file names that start with a letter use the character I as the starting character.

we support removing the first two characters of a student ID, as long as the ID has five or more characters

For a student with the student ID of S12345678, the photograph for the student may use any of the following file names:

- - IS12345678.jpg, - SI12345678.jpg, - I2345678.jpg, - IS12345678.png, - SI12345678.png, - I2345678.png, - IS12345678.gif, - SI12345678.gif, - I2345678.gif, - IS12345678.bmp, - , I12345678.bmp, - I2345678.bmp

# Applications

# Student Self-Service

# Student Self-Service





# Overall Page and Field Configuration (SOAWSCR) – SSB9 Registration only

**Persona:** STUDENT Student   
 **Page:** 10 Class Search Basic   
 **Effective Term:** 000000 The Beginning of Time   
 **End Term:** 999999  
 Copy From Persona:    Copy From Term:

▼ OVERALL PAGE AND FIELD CONFIGURATION + Insert

Display Number	Field *	Field Description	Displayed	Baseline Display Text	Custom Display Text	Required
1	subject	Subject	<input checked="" type="checkbox"/>	Subject		<input type="checkbox"/>
2	courseNu...	Course Number	<input checked="" type="checkbox"/>	Course Number		<input type="checkbox"/>
5	keywordlike	Keyword (Partial Words)	<input checked="" type="checkbox"/>	Keyword (Partial Words)	Keyword (Partial Words)	<input type="checkbox"/>
10	attribute	Attributes	<input checked="" type="checkbox"/>	Attributes		<input type="checkbox"/>
20	courseTitle	Title	<input checked="" type="checkbox"/>	Title		<input type="checkbox"/>
30	instructor	Instructors	<input checked="" type="checkbox"/>	Instructors		<input type="checkbox"/>
35	partOfTerm	Part Of Term	<input checked="" type="checkbox"/>	Part Of Term		<input type="checkbox"/>
	building	Buildings	<input type="checkbox"/>	Buildings		<input type="checkbox"/>
	courseNu...	Course Number Range	<input type="checkbox"/>	Course Number Range		<input type="checkbox"/>
	creditHour...	Credit Hour Range	<input type="checkbox"/>	Credit Hour Range		<input type="checkbox"/>

# Student Profile – Persona Access

**In SSB8, Faculty/Advisor roles were determined “on the fly” when the user first accessed a page in SSB.**

- If they accessed a Class Roster page first, they were flagged as a Faculty and that followed them through their session
- If they accessed an Advisor Listing, they were flagged as Advisor
- Hence the need for the Process Control Code Validation (STVPROC) Check Order and Enforce Check Order

**In SSB9, it’s “simplified” in that it goes straight off the SIAINST checkboxes**

- You are either Faculty, Advisor, Faculty and Advisor, or Faculty Override
- Text and fields/links can be controlled for each of those “Persona”
- Advisor Notes controls are delivered enabled for the Override role and must be configured for other Persona (including Student) in the WAR or Property files for Notes

# Faculty Pages – additional items to think about

**ID Cards are based on Directory Options Rules (GOADIRO) configuration**

**SSB Faculty Advisor Security should be reviewed**

- Process Control Codes (STVRPOC)
- Faculty / Advisor Process Rules (SOAFACS)
- Faculty Attribute / Advisor Type Control (SOAFAPC)

**Crosswalk Validation (GTVSDAX) settings**

- Every Faculty SSB piece has GTVSDAX components. Best to review the Faculty Self Service Handbook

**GUACONF configurations**

- Display Midterms
- Academic Review

# Student Profile – additional items to think about

## Notes must be configured in the properties file per Persona

- Student Note Category Validation (STVNTCG) and Student Note Interaction Type Validation (STVNTIN)

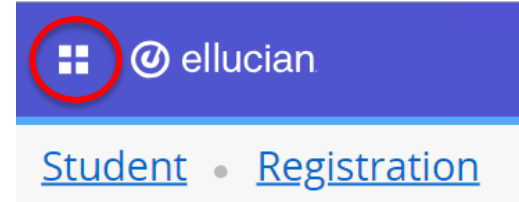
## Student Term code selection controlled on GORRSQL

- Process = STUDENT\_PROFILE  
Rule = STUDENT\_PROFILE\_DEFAULT\_TERM

## Editing Links in the configurations.properties file

- Student Advisor for additional links:
  - You MUST maintain the sequential order. Removing a sequence means all other later links must be renumbered. Must NOT skip a sequence number

# 5 Additional Things to Review



Landing Page on GUAINFO

4 Square = WebTailor Menu

Student Profile Term Drop Down based on GORRSQL

Advising Profile Links configured in Properties file and must be in sequential order. Removing a sequence means all other later links must be renumbered. Must NOT skip a sequence number.


Links repeated per PERSONA (called ROLE in technical file)

# General Self-Service

# General Self-Service

ellucian ⚙️ 👤 Roderick, Matthew Chapman

[My Profile](#) » [Personal Information](#)



**Roderick M. Chapman**  
ID Number: HOP510002

✉️ rmchapman@banner.edu

📍 house no 3 , Michigan, vegas, Alabama 560025

📞 215 2828019

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**Personal Details** ✎ Edit

<b>First Name</b> Roderick	<b>Middle Name</b> Matthew	<b>Last Name</b> Chapman
<b>Date of Birth</b> September 12, 1945	<b>Marital Status</b> Divorced	<b>Legal Sex</b> Male
<b>Preferred First Name</b> Rod	<b>Personal Pronoun</b> -	<b>Gender Identification</b> -

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**Email** ➕ Add New

<b>State University (Preferred)</b> rmchapman@banner.edu ✎ 📄	<b>Home</b> chapmanHome@email.com ✎ 📄
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**Phone Number** ➕ Add New

**Permanent (Primary)**  
215 2828019  
✎ 📄

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**Address** ➕ Add New

<b>Emergency Contact</b> Current 05/17/2017 - (No end date) house no 3 , Michigan vegas Alabama 560025 ✎ 📄	<b>Permanent</b> Current 01/07/2009 - (No end date) 4481 Centennial Farm Road1, Malvern Pennsylvania 19355 ✎ 📄
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**Emergency Contact** ➕ Add New

1. Alexis Chapman  
Child  
Phone: 978 8450314  
4519 Christie Way  
Boston  
Massachusetts 02110  
✎ 📄

# General Pages – additional tricky things

## Integration Configuration Settings (GORICCR)

- ENABLE.DIRECT.DEPOSIT - Controls whether the Direct Deposit page will show in SSB on General Person
- PERSONAL INFORMATION SSB
- ENABLE.PASSWORD.CHANGE –Y or N
- ENABLE.SECURITY.QA.CHANGE – Y or N

Can also have links to the Ethnicity Survey, Military Survey, and Disability Survey

## Business Rules (GORRSQL)

### GUACONF

- Payment Vendor settings
- AIP






# Employee Self-Service

# Employee Self-Service Configurations


- **Installation Rules (PTRINST)**
  - “Self Service” Tab
- **Web Based Pay Stub Rules (PTRWSTB)**
- **Banner Applications Configuration (GUACONF)**
- **Text Manager Interactive Translator (GMATRAN)**
- **Name Display Rules (GUANDSP)**
- **Address Role Privileges (GOADDRL)**
- **General Crosswalk Validation (GTVSDAX)**
- **Mass Update (NBPMASS)**

# Employee Dashboard

Chapman, Rod M.

Employee Dashboard

## Employee Dashboard



Chapman, Rod M.

[My Info](#)

[My Terms](#)

Leave Balances as of 03/15/2019

Vacation Pay in days	27.53	Sick Pay in days	27.53	Personal Pay in days	2.00
Maternity Leave in days	24.77	test leav1 in days	1.00	test leav2 in days	2.00

[Full Leave Balance Information](#)

Your Pay

Latest Pay Stub: 03/19/2016

All Pay Stubs

Direct Deposit Information

Deductions History

Earnings

Benefits

Taxes

Job Summary

Employee Summary

[My Activities](#)

- Approve Time
- Approve Leave Report
- Approve Leave Request
- Electronic Personnel Action Forms (EPAF)
- Faculty Load and Compensation
- Salary Planner
- Effort Certification
- Labor Redistribution
- Pay Stub Administrator
- Benefits Administrator
- Campus Directory
- Position Description

prubxe02.grnatvalleyu.com:8888/EmployeeSelfService/esh/hrDashboard

# Finance Self-Service

# Finance Self-Service Configurations

- **Banner Applications Configuration (GUACONF)**
  - Vendor Addresses
  - Available colors and percentages
  - Banner Document Management controls
- **Text Manager Interactive Translator (GMATRAN)**
- **Name Display Rules (GUANDSP)**

# Finance Dashboard

The screenshot shows the ellucian Finance Dashboard. At the top, there is a blue navigation bar with the ellucian logo on the left and a settings gear icon, a user profile icon, and the name "Denise McGarry" on the right. Below the navigation bar, the main content area has a light blue background. The title "My Finance" is displayed in a large font. Underneath the title is a horizontal line. A user profile icon is shown next to the text "Hello Denise, Create, edit and approve transactions and view financial information for department / organization." Below this, there are three white cards with rounded corners. The first card is titled "My Finance Query" and features an icon of a gold coin with a dollar sign and a blue line graph. The second card is titled "My Journals" and features an icon of a blue notebook with a green tab. The third card is titled "My Requisitions" and features an icon of a blue document with a checklist and a blue arrow. Each card contains a brief description of its function.

ellucian

Denise McGarry

## My Finance

Hello Denise,  
Create, edit and approve transactions and view financial information for department / organization.

**My Finance Query**  
Create, view and share budget availability, encumbrance and payroll queries.

**My Journals**  
Create and view draft, pending and completed journals and supporting documentation.

**My Requisitions**  
Create and view draft, pending and completed requisitions and supporting documentation.

# Summary

**Implementing Self-Service 9x you have options**

**GUACONF has majority of the configurations for all applications**

**Some applications have additional configurations in other pages**

**March 2020 All SSB 8x baseline applications will be converted**

# Installation Guides

Each application has an installation guide:

[Employee Self-Service Installation Guide Sept 2019](#)

[Banner Faculty Self Service Installation Guide 9.9 September 2019](#)

[Banner Finance Self Service Installation Guide 9.2.1 September 2019](#)

[Banner General Self Service Installation Guide 9.4 Sept 2019](#)

[Banner Student Self Service Installation Guide 9.10 September 2019](#)

[Banner Student Self Service Registration Installation Guide 9.15 September 2019](#)



# Handbooks

Each application has an handbook with configurations checklists:

[Banner Employee Profile Handbook 9.9 Sept 2019](#)

[Banner Faculty Self Service Handbook 9.9 September 2019](#)

[Banner Finance Self Service Handbook 9.2.1 September 2019](#)

[Banner General Self Service Handbook 9.4 Sept 2019](#)

[Banner Student Self-Service Registration Handbook 9.15 September 2019](#)

[Banner Student Self-Service Handbook 9.10 September 2019](#)



Thank you.

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