

Cindy Taylor Information Technology Services September 21, 2012

Banner Business Practices for The Academic Data Mart

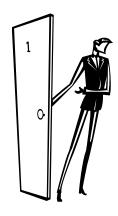


Session Etiquette



Please turn off or set all cell phones/pagers to vibrate.

If you must leave this session early, please sit at the back of the room and do so quietly.





Please avoid side conversations during this session.



Topics For Discussion

- Basic Banner Data Entry
- USG by the Numbers (USG123)
- ADM Data Element Dictionary (DED)
- ADM Translations
- Data Entry for Reporting
- Example



- Course and student data
 - Build courses and sections
 - Admit and register students
 - Grade courses and maintain academic history
 - Perform accounts receivable and financial aid transactions
- Accurate data entry is vital for accurate data reporting
- Stay up-to-date
- Update institutional data entry instructions
- Distribute to campus staff



- Baseline Banner instructions
 - Ellucian
- Computer Based Training (CBT)
 - https://udca.sungardhe.com



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On-Demand Subscription Library

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Password:	
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Education Services recognizes that the learning needs of every institution and every individual are different. Everyone has distinct needs and preferences for the delivery format, class location, and course content. Education Services offers a comprehensive training program so that you can choose the training solution that makes sense for you and your organization.

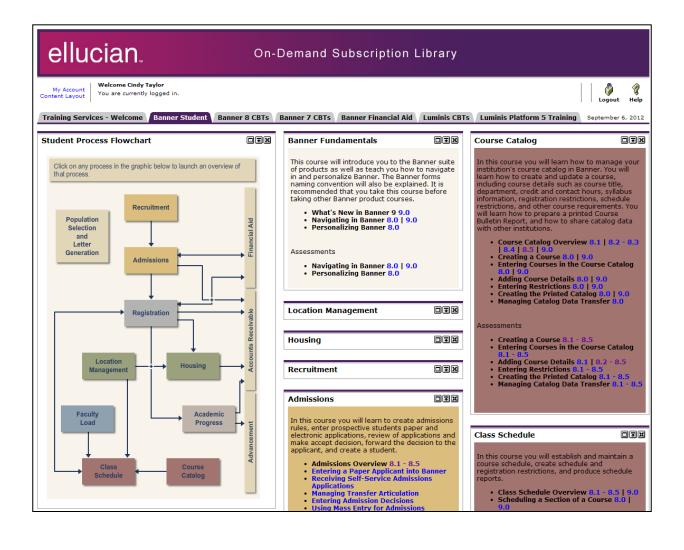
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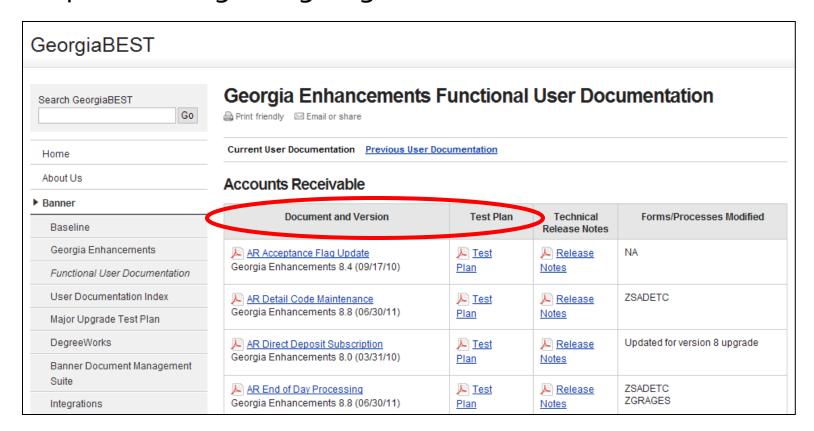




- Georgia Enhancements
 - GeorgiaBEST
- Georgia specific functionality
 - Georgia Requirements form (ZOAGARP)
 - CPC, Regents' Test, Legislative Requirements, Overlay Requirements, Learning Support
 - High School Detail Information form (ZOAHSCD)
 - Georgia Testing ID (GTID)
 - Georgia GPAs form (ZHATERM)
 - Regents' GPA, HOPE GPA

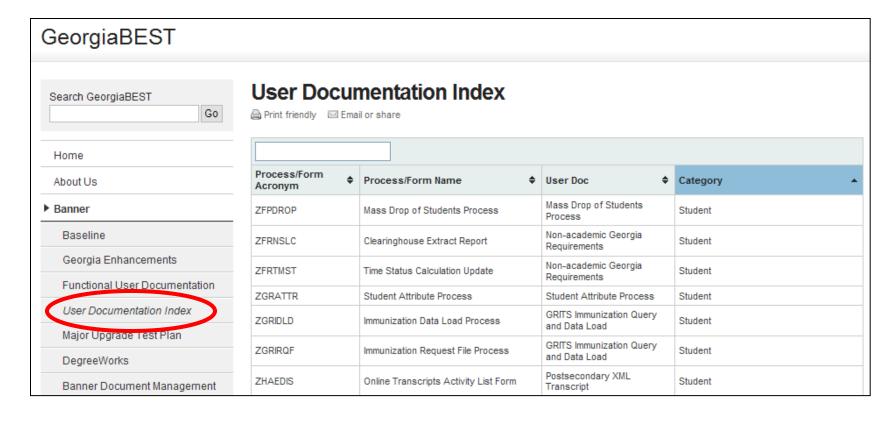


Functional documentation
 http://www.usg.edu/georgia_best/banner/userdocs/



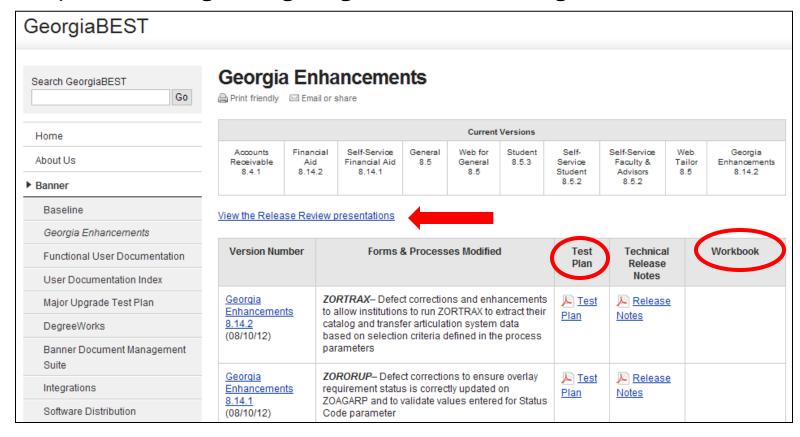


Documentation index
 http://www.usg.edu/georgia_best/banner/user_doc_index





 Workbook and release specific test plan http://www.usg.edu/georgia_best/banner/ga_enhancements





Release review slides
 http://www.usg.edu/georgia_best/training/georgiabest_etraining#monthlyreview

Georgia Enhancements Slide Show Presentations								
Slide Show	Release	Modification Type	Presentation Date					
P D2L Extract Process (ZSRD2LX)	Georgia Enhancements 8.14	New Functionality	06/29/12					
USG Academic eSafe Transcript (ZHRXMIT)	Georgia Enhancements 8.14	Defect Correction	06/29/12					
Executable Enrollment Scripts	Georgia Enhancements 8.13	Defect Correction	06/01/12					
Self-Service Attendance Verification	Georgia Enhancements 8.13	Defect Correction	06/01/12					
Self-Service Release of Holds	Georgia Enhancements 8.13	Defect Correction	06/01/12					



Major upgrade test plan (updated quarterly)

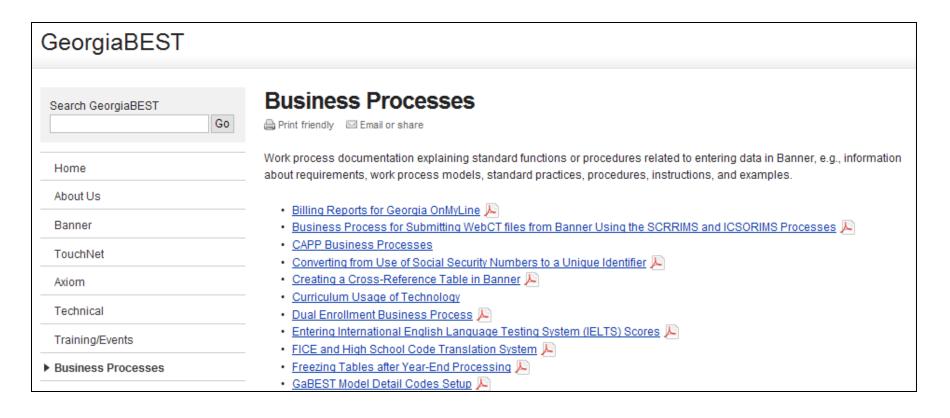
http://www.usg.edu/georgia_best/banner/major_upgrade_testplan

- Items Requiring One-time Setup
- Set Up Financial Aid (once a year—February-May)
- Set Up Term
- Recruit Student
- Tape Loads
- Create General Person Data
- Admissions
- Self-Service for Students—Admission Application
- Assign Housing/Meals/Phone
- Financial Aid Applicant Processing
- General Student Data
- Establish Holds
- Create Direct Deposit Subscription Records
- Registration

- Create Direct Debit Subscription Records
- Write Receipts
- Process Student Health Insurance
- Load College Work Study Payroll Data
- HOPE Invoicing
- End of Day Processing
- Auditing Tool Kit
- Student and Exchange Visitor Information System (SEVIS)
- Mid-term Processing
- Academic Transcripts
- End-of-Term Processing
- Once-a-Year Items
- Banner Web Tailor, Student, General, Faculty, and Advisor Self-Service



Business processeshttp://www.usg.edu/georgia_best/business_processes





USG by the Numbers

https://app.usg.edu/portal/page/portal/USG123_10G



Welcome to USG by the Numbers (USG123)

The University System of Georgia's resource for reporting and accountability for higher education

The USG123 portal provides information seekers with a system that promotes accessibility, consistency and usefulness.

Public users, as well as role based user groups within the University System of Georgia, have the opportunity to access statistical information and analyze data related to specific areas, such as

Students: Through the Students portal, users can access information related to academic programs, student enrollment, retention rates, graduation rates and degrees conferred.

Financials: Through the Financials portal, users can access information related to the University System of Georgia's financial data, such as the system's budget, revenue and expenditures.

What Can I Do?

UNIVERSITY SYSTEM OF GEORGIA

Search <u>degree and major</u> <u>information</u> to find a program of study in a University System of Georgia college or university.

Site Information

We recommend the configurations in the link below. In addition, your browser must be JavaScriptenabled.

View all site information

Documentation

Please <u>click here</u> to find USG123 Data Warehouse documentation (Login required).



Business practices related to specific reporting data entry needs

- Contain translation values used by the ADM
- Business practices crossposted to the GeorgiaBEST website

ADM Documentation

INKS

Business Practice Documents

Business Practice Archive

Academic Data Mart Census and Due Dates

ADM Data Element Dictionary (DED)

Data Model

Data Warehouse Newsletter

Enrollment Report Information

ADM Point of Contact List

Spring 2010 Information

Release Documents

User Guides

Archive

SOAXREF Translation Values

ADM Data Element Dictionary (DED)

- Lists specific data elements collected for reporting purposes and valid Regents' values
- Data edits important information for data entry staff
 - If Admit Type is TR, TL, TP, or NT, Prior College cannot be null.
 - Citizenship Status Code must be C if Country of Citizenship = US.

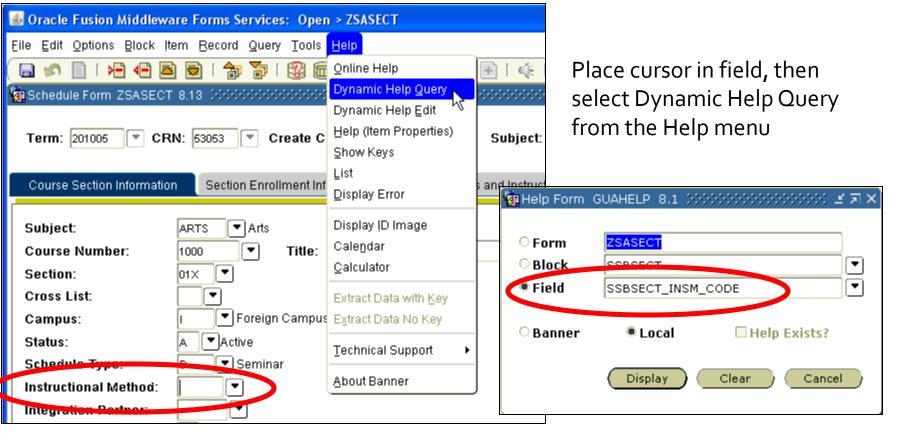
ADM Data Element Dictionary (DED)

- Banner form, field and table location for data entry
- Translate institutional values to standard Regents' values
 - EDI Cross-Reference Rules form (SOAXREF)
 - Crosswalk Validation form (GTVSDAX)



ADM Data Element Dictionary (DED)

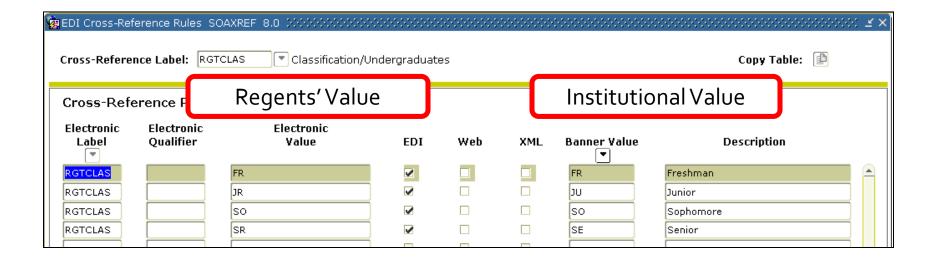
Find field name using Dynamic Help Query





ADM Translations

- EDI Cross-Reference Rules form (SOAXREF)
- Over 30 labels to translate





ADM Translations

- RGTCHRT
- RGTADMT
- RGTADPL
- RGTCLAS
- RGTCPC
- RGTCNTY
- RGTRSTS
- RGTDETC
- RGTDEGC
- RGTTERM
- RGTDPLM
- RGTMAJR

- RGTLS
- RGTCIPE
- RGTRACE
- RGTETHC
- RGTRGT
- RGTATTS
- RGTESTS
- RGTSLVL
- RGTSTYP
- RGTTTYP
- RGTPURP
- RGTTEST

- RGTGMOD
- RGTATTR
- RGTSSCD
- RGTBLDG
- RGTINSM
- RGTNFIR
- RGTSITE
- RGTSSTS
- RGTSCHD
- RGTADDR*
- RGTMADD* (*GTVSDAX)



Reminder:

- Accurate data entry is vital for accurate data reporting
- Update institutional data entry instructions
- Distribute to campus staff
- Communication necessary
 - Who is responsible for submitting ADM data?
 - Who enters data that is collected by the ADM?
 - Is all required data entry completed?
 - Have all required processes been run successfully?



- Which institutional offices use these forms?
 - SPAIDEN
 - SPAPERS
 - SOATEST
 - SAAADMS
 - SGASTDN
 - SOAHSCH
 - ZOAHSCD
 - SSASECT
 - ZSASECT

- SHATRNS
- ZOAGARP
- ZOARESI
- SFAREGS
- SCACRSE
- SHADEGR
- TSAAREV
- SOAPCOL
- ZHAHOPE



Biographical Gender: Male Female Not Awaitable Citizenship: Citizens	General Person SPAPERS 8.5.3.1 00000000000000000000000000000000000		>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Gender: Male Female Not Available Not Available Birth Date: 03-MAR-1975	ID: 147147147 ▼ Special, Guy R.		
Not Available SSN/SIN/TIN: 123123123 Deceased Date:	Biographical		
Marital Status: Religion: Legacy: Active Duty Separation Date: Armed Forces Service Medal Indicator Special Disabled Veteran New Ethnicity: Hispanic or Latino VEthnicity and Race Confirmed Confirmed Date: 17-MAR-2009 Business practice located at http://www.usg.edu/georgia_best/busproc_docs/	○ Female	Age: 37	Deceased
Marital Status: Religion: Legacy: Active Duty Separation Date: Armed Forces Service Medal Indicator Special Disabled Veteran New Ethnicity: Hispanic or Latino VEthnicity and Race Confirmed Confirmed Date: 17-MAR-2009 Business practice located at http://www.usg.edu/georgia_best/busproc_docs/	Citizenship: C VU.S. Citizen	Veteran File Number:	
Legacy: Character Charact		Veteran Category:	None
Ethnicity: M Multiracial Special Disabled Veteran New Ethnicity: Hispanic or Latino WEthnicity and Race Confirmed Confirmed Date: 17-MAR-2009 Business practice located at http://www.usg.edu/georgia_best/busproc_docs/	Religion:	Active Duty Separation Date:	
New Ethnicity: Hispanic or Latino Ethnicity and Race Confirmed User: CTAYLOR	Legacy:		Armed Forces Service Medal Indicator
Business practice located at http://www.usg.edu/georgia_best/busproc_docs/	New Ethnicity: Hispanic or Latino	onfirmed User:	
	Race	Business practice located at http://www.usg.edu/georgia	a_best/busproc_docs/



🗽 Georgia Requi	rements Form ZOAGARP 8.12 10000	********	0.000.000.000.000.000.000	0.000.000.000.000.000		0.000.000.000.000.000.000	000000000 <u> </u>
ID: [147147 ²	47 ▼ Guy Really Special						
Georgia R	equirements					History <i>l</i>	History <i>!</i>
NCRQ Code	Description Compass - Math	Requirement Status Date RQ 03-JUL-2012	Satisfied	Advisor	CPC Desired	CPC Constitution Used Desired	Constitution Used
COMR	Compass - Reading	RQ 03-JUL-2012	N				
CPCE	CPC - English	SH 03-JUL-2012	Y			Y	
CPCF	CPC - Foreign Language	SH 03-JUL-2012			Y		
	Description CPC - English CPC - Foreign Language	Translate CI SOAXREF >					es on
Holds							
Reason:	M ▼ CPC-Mathematics	Amou		r •		User: JGRUBE	as .



🍓 High School Detail Information Form ZOAHSCD 8.3 ১೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦೦
ID: 147147147 ▼ Guy Really Special, Junior
User documentation located at Georgia Testing ID http://www.usg.edu/georgia_best/user_docs/gamo d8_o_HighSchoolGTID_userdoc_FINAL.pdf
High School Detail High School: 10055 Bacon County High School Transcript Receive Date: Transcript Receive Date: System web site
Class Rank: 25 Class Size: 100 Percentile: 75 High School GPA: 3.00
Admission Checklist Request Code: Diploma: CP College Preparatory
Translate diploma type values on SOAXREF > RGTDPLM CPC GPA:



複Schedule SSASECT 8.3.0.3 ১০০০০০০০০০০০০০০০০০০০০০০০০০০০০০০০০০০০০	$\times \times$							
Term: 201002 Create CRN: Copy CRN: Subject: ENGL Course: 1101 Title: English Composition I								
Course Section Information Section Enrollment Information Meeting Times an	nd Instructor Section Preferences							
Subject: ENGL Finglish Course Number: 1101 Title: English Composition I	Credit Hours: 3.000 None OTO Or							
Cross List:	Billing Hours: 3.000 None OTo Or							
Campus: Status: A ▼ Main Campus A ▼ Active Schedule Type: A ▼ Lecture	Contact Hours: 3.000 None To Or							
Instructional Method:	Lecture: 3.000 None To Or							
Grade Mode: Session: A On campus, in assigned space	Lab: None OTo Or							
Special Approval: Duration:	Other: None To Or							
Part of Term: 1 ▼ 02-JAN-2008	Link Identifier: Attendance Method:							
Registration Dates:	Translate schedule type, section							
	status values on SOAXREF >							
□ Long Title □ Comments ☑ Syllabus	RGTDPLM, RGTSSTS							



🙀 Georgia GPAs Form ZHATE	RM 8.0 (XXXXXXXX)	000000000000	*******	**********	0.000.000.000.000.000.000.000.000	0000000000000000000000000000000000000
ID: 147147147 ▼ Guy R	eally Special, Junior		Lev	vel: US 🔻	Start Term:	•
Current Standing						
First Term Attended: Last Term Attended:	200905				ative hours, qua	ality
Academic Standing: Academic Standing Overs	ride:	р	oints, ar	nd GPAs		
	Attempted Hours	Passed Hours	Earned Hours	GPA Hours	Quality Points	GPA
Overall Institution GPA:	85.000	77.330	74.660	73.330	226.000	3.081
Overall Transfer GPA:	106.330	101.660	89.660	101.660	210.000	2.065
Overall GPA:	191.330	178.990	164.320	174.990	436.000	2.491
Overall Regents' GPA:	81.000		77.660	76.330	235.000	3.070
Overall HOPE GPA:	.000		.000	.000	.000	.000



- Schedule form (ZSASECT)
 - Instructional Method field = Instructional Delivery
 Code
 - Delivery Technology tab = Course Section Technology



- Data entry responsibility (ZSASECT, SSASECT, SSADETL)
- Update and share data entry instructions
- Data entry deadline awareness
- Accurate data entry is vital for accurate data reporting



Georgia Enhancements 8.6

A Print friendly Email or share Modified December 16, 2010

RELEASE DATE

December 17, 2010

PURPOSE

The Georgia Enhancements 8.6 release also includes defect corrections and enhancements for the following:

- HOPE Invoicing Extraction Process (ZHRHINV)
- SAP Group Assignment Process (ZOBSGRP)
- · Attendance Verification Process (ZHRNOSH)
- Student Health Insurance Extraction (ZSRSHIR)
- Admissions Index Calculation Process (ZORINDC)

The Georgia Enhancements 8.6 release also includes change requests for the following: * Section Schedule Update Process (ZSRSCHD) * Voyager Library Extraction (ZORVLIB) * CPC HS Requirements Undate Process (ZORCPCH) * CPC Fulfilling High School Courses Rules Form (ZOACPC) * Schedule Form (ZSASECT)

IMPACT

Implementation is Mandatory

DOCUMENTATION

This release includes the following documentation:

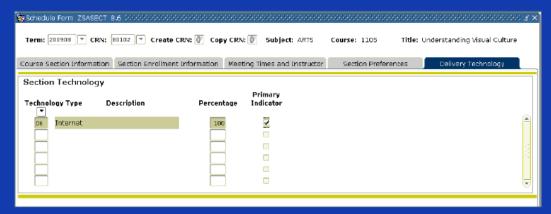
- Technical Release Notes for Georgia Enhancements 8.6
- Georgia Enhancements 8.6 Test Plan



Georgia Enhancements 8.6 Test Plan		mation Technology Services niversity System of Georgia	
Testing the Schedu	le Form (ZSASECT)		
ZSASECT Enhancement	A USG institution submitted a change requestacilitate entry of distance education technology Technology tab has been added to (ZSASECT). The Delivery Technology tab the Section Contracts portion of the Contract Information tab from the Schedule Detail for form field names have been changed, but the remain the same and the data will be stored table fields as are currently used by SSADE entered on ZSASECT will backfill the SSA	logy information. A new the Schedule Form is essentially a clone of et and Block Schedule orm (SSADETL). Some e field validations will in the same SSRSCCD TL. The information	
	The hint text has been updated for the Instru ZSASECT to remind users to enter the technon the Delivery Technology tab.		
Functional Impact	The Instructional Method field hint text will technology type information on the new De	Steps in Testing	In the Key Block of ZSASECT, enter a Term code and Course Reference Number.
	Institutions can use the fields on this new to education technology information. Any inf		Perform a Next Block function to the Course Section Information tab.
	fields will backfill the Section Contracts se		With your cursor in the Instructional Method field, confirm that the hint text at the bottom of the screen is as follows: o Instructional Method code; press LIST for valid codes. Go to Delivery Technology tab to enter technology type for this section.
			Go to the Delivery Technology tab.
			Enter the technology type used in this section in the Technology Type field.
			Enter the percentage of technology used in the Percentage field.



Add Delivery Technology information (ZSASECT)



 Data is stored in the same SSRSCCD table used by the Section Contracts block on SSADETL.

GeorgiaBEST Production Support



Using Non-academic Requirements Georgia Enhancements 8.6 Information Technology Services University System of Georgia

Student Schedule Form (ZSASECT)

Description

The Student Schedule form (ZSASECT) is a clone of Banner baseline Schedule form (SSASECT) that allows the Instructional Method field to be updated after registration has occurred for the course section. The

field has been used by some institution extracted through the ICGORLDI proc Method field prevented any updates wh section.

Term: 200908 * CRN: 80290 * Create CRN: @ Copy CRN: @ Subject nation | Section Enrollment Information | Meeting Times an Subject Title: Pundementals of Accounting Course Number Cross List: Main Campus Compus: A ▼ Active Status: Lecture Schedule Type Instructional Method: Fully at a distance Integration Partner: Grade Mode: Special Approval: Duration: Part of Term 12-DEC-2009 EE 6 Registration Dates: Start Dates:

Delivery Technology

The Delivery Technology tab facilitates technology information. The Delivery Colone of the Section Contracts portion of Schedule Information tab from the In

Using Non-academic Requirements Georgia Enhancements 8.6 Information Technology Services University System of Georgia

Term: 200908 💌 (RN: 80290 * Creat	e CRN: 🕼 Copy CRN	Subject: ACCT	Course: 1101 Title	propositions of Accounting
Section Technolo		Percentage	ing Times and Instructor Primary Indicator	Section Preferences	Delivery Technology
06 Internet 09 Other		90			

Resource

Refer to the Curriculum Technology User Documentation (http://www.usg.edu/georgia_best/busproc_docs/Curriculum+Technology+User+Documentation.pdf) for more information about entering distance technology information.



Course Section Technology

Change History

Formerly CIR C240

Course Section Tech	illiolog	У						
Element Title C	Course S	Section Technolog	у					
	The Cou		ology field identifies the pri	imary technology used in delivering				
Data Element Type C	Course							
Element Size 1	10							
Valid Values	Code	Category	Description					
	01	Videocassette	Instruction delivered throu	o .				
	02	Satellite	Instruction delivered throu technology.	ugh downlinks of satellite				
	03	GSAMS	Instruction delivered throu	0				
	04	Two-Way Interactive Video	Instruction delivered throu technology than GSAMS.	ugh other interactive video				
	05	Television	Instruction delivered throu	ugh television transmissions.				
	06	Internet	Instruction delivered throu Web pages and learning r	ugh the Internet including e-mail, management systems.				
	07	Other Network	Instruction delivered throu Internet network.	ugh a local area or other non-				
	08	Print-Based Materials	Instruction delivered throu instructional materials.	ugh print-based correspondence				
	09	Other		y not defined by another code. I <i>not</i> be used as a catch-all for ns of DE technologies.				
	10	CD-ROM	Instruction delivered throu	ıgh CD-ROM(s).				
	11			11				
	Nu	Banner F	Reference	Course section tech	nnology information can be entered on SSADETL or ZSASECT to			
Business Practices I	Insti	Danner	Coloronoc	populate the SSRS	CCD table. The Contract field (SSRSCCD_SCCD_CODE) is located			
Edits F	Req				Block Schedule Information tab on the Schedule Detail form			
Daimer Kelefelice	Cou			l				
0	popi on th				echnology Type field (SSRSCCD_SCCD_CODE) is located on the			
	(SS) Deli			Delivery Technology tab of the Schedule Form (ZSASECT). Enter the primary type of				
	tech			technology used to deliver instruction for all courses and check the Primary Indicator				
1 '	(SSI				ARY IND).NOTE: This field should be completed for all courses,			
Warehouse	not Tabl			not just DE.				
Reference	Colu			'				
Date Issued								
Date of Last Update 0	01/26/10), 5/11/10						



DE Data Entry in Banner for ADM

Overview of Banner Data Entry for ADM **DE Elements**

If your institution uses Banner, the following instructions may be used to ensure that your data is in the correct fields for the default ADM Banner extraction package.

Update Validation and Rules Forms							
Enter Course Section Instructional Method codes on the Instructional Method Validation form.	GTVINSM						
Verify that Course Section Technology codes are entered on the Schedule Contract Code Validation form.	STVSCCD						
Enter External Site codes on the Building Code Validation form.	STVBLDG						
Enter the campus code 'Z' on the Building Definition form.	SLABLDG						
	Enter Course Section Instructional Method codes on the Instructional Method Validation form. Verify that Course Section Technology codes are entered on the Schedule Contract Code Validation form. Enter External Site codes on the Building Code Validation form. Enter the campus code 'Z' on the Building						

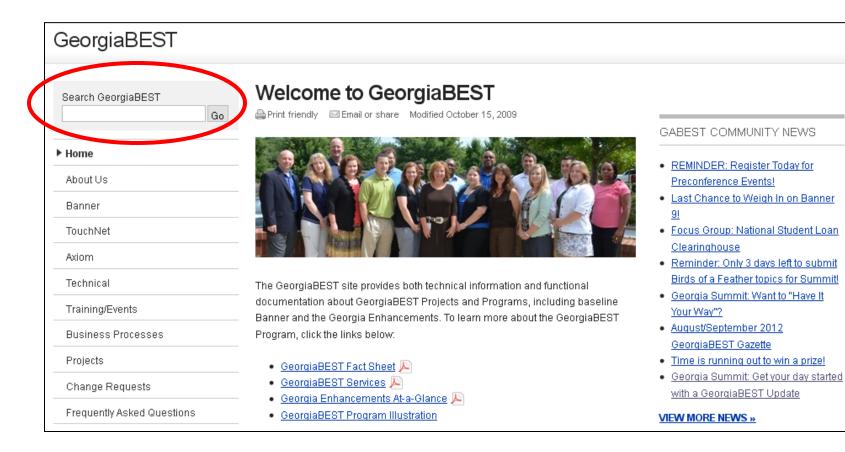


SOAXREF

	· ·						
Enter DE data elements							
1.	Enter the Instructional Delivery Code in the Instructional Method field on the Schedule form.	SSASECT or ZSASECT					
2.	Enter the Course Section Technology code in the Contract field in the Section Contracts block of the Schedule Detail form.	SSADETL					
	OR – Enter the Course Section Technology code in the Technology Type field on the Delivery Technology tab of the Schedule Form.	ZSASECT					
3.	Enter the External Site code in the 'Building' column on the Meeting Time page of the Schedule form.	SSASECT or ZSASECT					

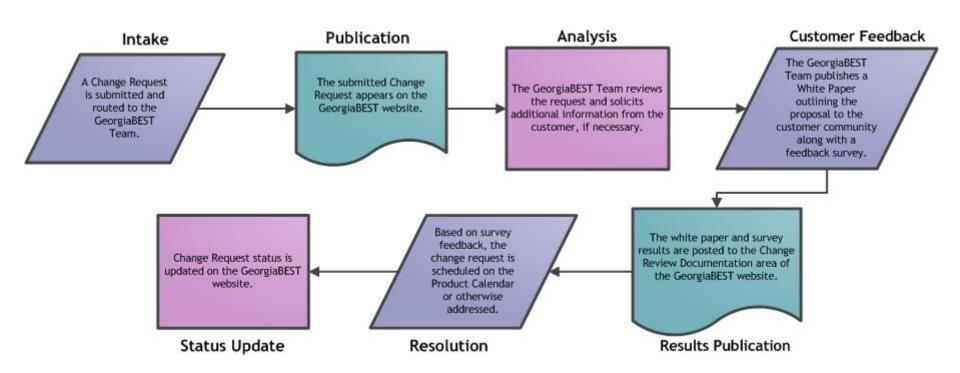


Don't forget to Search





Change Review



http://www.usq.edu/georgia_best/change_requests/change_request_submit



Ellucian's Sessions

- Be sure to stop by Ellucian's Vendor Room for additional sessions.
 - Course Signals Product Demo, Thursday, September 20th 10:20-10:40 am
 - Recruiter Product Demo, Thursday, September 20th 2:50-3:10 pm



Where Can I Find Help?

Authoritative Source



https://connect.ellucian.com



http://www.usg.edu/georgia_best/

Community Source



http://www.edu1world.org/ CommonsSunGardHE/



http://www.edu1world.org/USG/



Where Can I Find Help?

- Remember: All USG GeorgiaBEST customers have access to Ellucian's Digital Campus Academy.
- Access baseline training on your own schedule
- Contact the ITS helpdesk
 (<u>helpdesk@usg.edu</u>) for access information



Additional ITS Resources & Support

- To create a new or update an existing production down, business interrupting (emergency) support request, call the ITS Helpdesk immediately
 - **7**06-583-2001
 - 1-888-875-3697 (toll free in Georgia)
- For anything else, contact the ITS helpdesk at
 - http://www.usg.edu/customer_services (self-service support request) or
 - E-mail at <u>helpdesk@usq.edu</u>

NOTE: Self-Service requires login using a user ID and access code. Contact the ITS Helpdesk at helpdesk@usg.edu to obtain self-service login credentials.



Questions?

