

Banner Business Practices for The Academic Data Mart

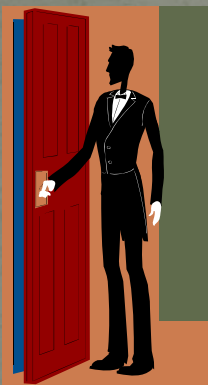
Cindy Taylor
ITS

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

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.



10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Topics for Discussion

- Basic Banner Data Entry
- USG by the Numbers (USG123)
- ADM Data Element Dictionary (DED)
- ADM Translations
- Data Entry for Reporting
- Distance Education
 - Planned Enhancement to ZSASECT

Basic Banner Data Entry

- 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 on new or updated Banner functionality and USG policies
- Update institutional data entry instructions
- Distribute information to campus staff

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Basic Banner Data Entry

- Follow SunGard Higher Education instructions for the basic use of the forms, processes, and self-service functions.
- Workbooks and Computer Based Training (CBT)
<http://udca.sungardhe.com/cp/home/loginf>

The screenshot displays the Digital Campus Academy website. At the top, there is a header with the logo and the text "Realizing your digital campus vision takes a community... Welcome to ours." Below the header, a navigation bar contains several tabs: "Training Services - Welcome", "Banner Student", "Banner 8 CBTs", "Banner 7 CBTs", "Banner 8 Workbooks" (which is highlighted), "Banner 7 Workbooks", "Banner Financial Aid", "Banner Finance", "Banner Human Resources", and "Luminis Training". The date "August 31, 2010" is shown on the right. Below the navigation bar, there are three main content areas, each titled "Banner 8 [Category] Workbooks":

- Banner 8 General Workbooks:** Includes a note about interim product releases and a list of links under "Version 8.0":
 - [General System Overview](#)
 - [Common Matching](#)
 - [Event Management](#)
 - [Fundamentals](#)
 - [Job Submission](#)
- Banner 8 Student Workbooks:** Includes a note about interim product releases and a list of links under "Version 8.0":
 - [Student System Overview](#)
 - [Academic History](#)
 - [Admissions](#)
 - [CAPP](#)
 - [Class Schedule](#)
- Banner 8 Financial Aid Workbooks:** Includes a note about interim product releases and a list of links under "Version 8.0":
 - [Algorithmic Packaging](#)
 - [Budgeting](#)
 - [Data Load - Record Creation](#)
 - [Direct Loans](#)
 - [Disbursements](#)

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Basic Banner Data Entry

- Follow GeorgiaBEST instructions for using the Georgia Enhancement forms, processes, and self-service functions.
- Georgia Enhancements are designed to handle functionality specific to Georgia.
 - Georgia Requirements form (ZOAGARP)
 - CPC, Regents' Test, Legislative Requirements, Learning Support
 - High School Detail Information form (ZOAHS CD)
 - GTID
 - Georgia GPAs form (ZHATERM)
 - Regents' GPA, HOPE GPA

Basic Banner Data Entry

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

GeorgiaBEST Production Support

Search GeorgiaBEST

Home
About Us
▶ **Banner**
Baseline
Georgia Enhancements
Functional User Documentation
Major Upgrade Test Plan
DegreeWorks
Banner Document Management Suite

Georgia Enhancements Functional User Documentation

Print friendly Email or share

[Current User Documentation](#) [Previous User Documentation](#)

Accounts Receivable

Document and Version	Test Plan	Technical Release Notes	Forms/Processes Modified
AR Acceptance Flag Update Georgia Enhancements 7.17 (12/19/08)	Test Plan	Release Notes	Revisions to documentation (no new functionality delivered)
AR Acceptance Flag Update Georgia Enhancements 8.0 (03/31/10)	Test Plan	Release Notes	Updated for version 8 upgrade
AR Detail Code Maintenance Georgia Enhancements 7.10 (12/14/07)	Test Plan	Release Notes	Revisions to documentation (no new functionality delivered)

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Basic Banner Data Entry

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

GeorgiaBEST Production Support

Search GeorgiaBEST

Home

About Us

► **Banner**

- Baseline
- Georgia Enhancements
- Functional User Documentation
- Major Upgrade Test Plan
- DegreeWorks
- Banner Document Management

Georgia Enhancements

Print friendly Email or share

[View the Monthly Release Review presentations](#)

Version Number	Forms & Processes Modified	Test Plan	Technical Release Notes	Workbook
Georgia Enhancements 7.26 (07/30/10)	<p>ZSRGDIS – New functionality to allow institutions to extract data for shared course sections and make it accessible for processing by INGRESS.</p> <p>ZSRIAVR – New functionality to provide the ability for institutions sharing course sections to load attendance verification data from INGRESS into Banner.</p> <p>ZSRIGRD – New functionality to provide the ability for institutions sharing course sections to load grade data from INGRESS into Banner.</p>	Test Plan	Release Notes	Banner Components for INGRESS Workbook

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Basic Banner Data Entry

- Release review slides

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

Monthly Release Review

Georgia Enhancements Slide Show Presentations			
Slide Show	Release	Modification Type	Presentation Date
 GOML Attendance Verification Load Process (ZSRIAVR)	Georgia Enhancements 7.26	New Functionality	07/30/10
 GOML Grade Load Process (ZSRIGRD)	Georgia Enhancements 7.26	New Functionality	07/30/10
 INGRESS Seat Management Enrollment Count Program 2 (ZSRSMG2)	Georgia Enhancements 7.26	New Functionality	07/30/10
 INGRESS Seat Management Enrollment Count Program 1 (ZSRSMG1)	Georgia Enhancements 7.26	New Functionality	07/30/10
 INGRESS Pin Encryption /Decryption Program (ZSRINGRESS_PIN_ENCRYPT)	Georgia Enhancements 7.26	New Functionality	07/30/10

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Basic Banner Data Entry

- 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

10/21/2010

GeorgiaBEST Program Team

Georgia Summit 2010

Basic Banner Data Entry





- Business processes

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

Business Processes

 Print friendly  Email or share

Work process documentation explaining standard functions or procedures related to entering data in Banner, e.g., information about requirements, work process models, standard practices, procedures, instructions, and examples.

- [Business Process for Submitting WebCT files from Banner Using the SCRRIMS and ICSORIMS Processes](#) 
- [CAPP Business Processes](#)
- [Converting from Use of Social Security Numbers to a Unique Identifier](#) 
- [Creating a Cross-Reference Table in Banner](#) 
- [Curriculum Usage of Technology](#)
- [Dual Enrollment Business Process](#) 
- [Entering International English Language Testing System \(IELTS\) Scores](#) 
- [FICE and High School Code Translation System](#) 
- [Freezing Tables after Year-End Processing](#) 
- [GaBEST Model Detail Codes Setup](#) 
- [GAcollege411 Business Practices](#)
- [Georgia High School Graduation Test Updates](#) 
- [Guaranteed Tuition Plan](#)

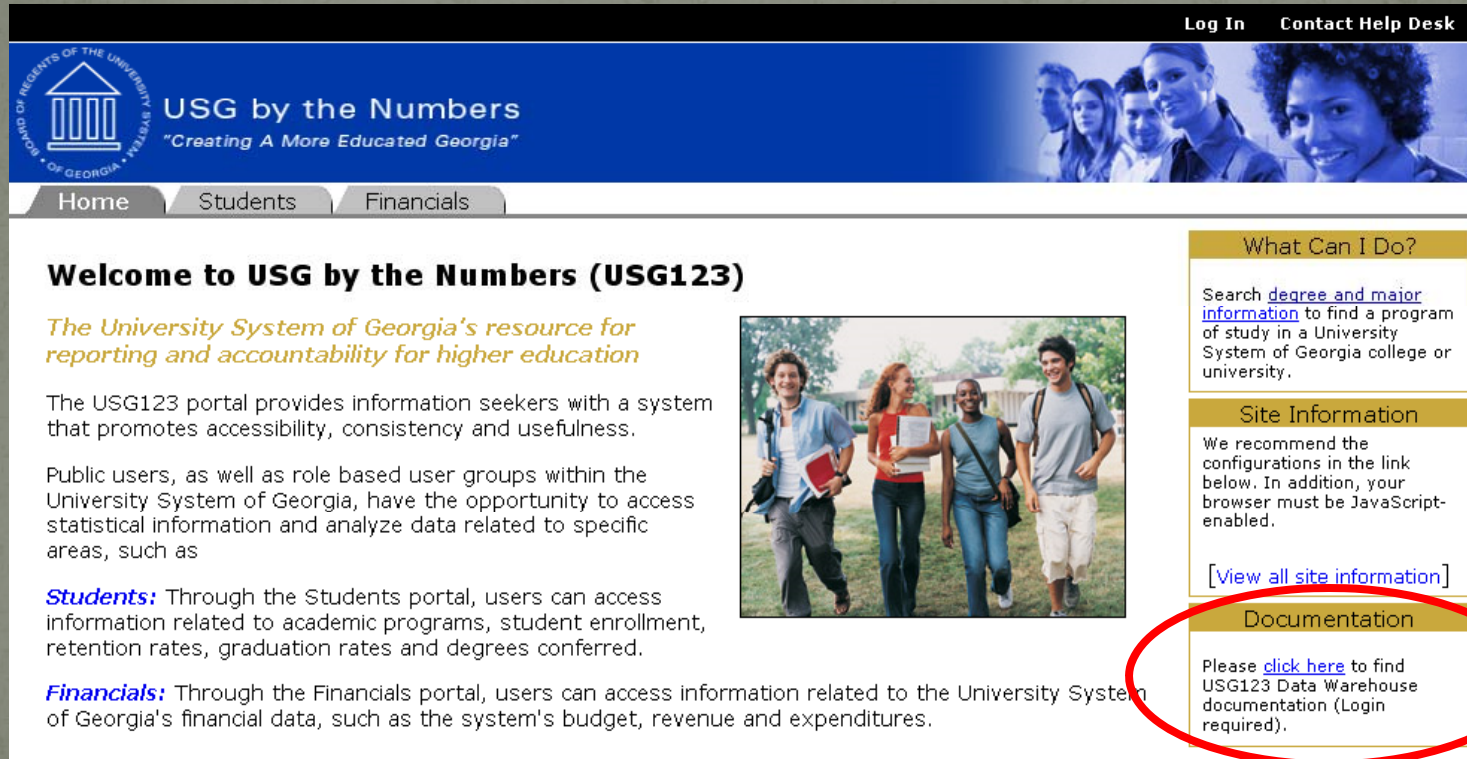
10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010


USG by the Numbers (USG123)

- USG by the Numbers

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



Log In Contact Help Desk

 **USG by the Numbers**
"Creating A More Educated Georgia"

Home Students Financials

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?

Search [degree and major information](#) 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 JavaScript-enabled.

[\[View all site information\]](#)

Documentation

Please [click here](#) to find USG123 Data Warehouse documentation (Login required).

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

USG by the Numbers (USG123)

- Business practices related to specific reporting data entry needs
- Contain translation values used by the ADM
- Most business practices are cross-posted to the GeorgiaBEST website

ADM Documentation

LINKS

- [Business Practice Documents](#)
- [Census Dates 2010-2011](#)
- [Census Dates 2009-2010](#)
- [DED](#)
- [Data Model](#)
- [Fall 2009 Information](#)
- [Point of Contact List](#)
- [Release Documents](#)
- [SOAXREF Translation Values](#)
- [Spring 2010 Information](#)
- [User Guides](#)
- [Archive](#)

ADM Data Element Dictionary (DED)

- Lists specific data elements collected for reporting purposes
- Valid Regents' values for each element
- Translate institutional Banner values to standard Regents' values (SOAXREF)
- 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)

- DED is currently being updated
- Provide more information to help data entry staff know which Banner form and field
 - Example: The Instructional Method field (SSBSECT_INSM_CODE) is located on the Course Section Information tab of the Schedule form (SSASECT) and the Schedule Form (ZSASECT). Use ZSASECT to update the Instructional Method after registration has occurred for the section. Institutional instructional method codes must be translated to the Regents' instructional delivery values on SOAXREF using Cross-Reference Label RGTINSM.

ADM Data Element Dictionary (DED)

- Find field name using Dynamic Help Query

Oracle Developer Forms Runtime - Web: Open > ZSASECT

File Edit Options Block Item Record Query Tools Help

Schedule Form ZSASECT 8.3

Term: 201005 CRN: 53053 Create CRN:

Course Section Information Section Enrollment

Subject: ARTS Arts
Course Number: 1000 Title: Dra
Section: 01X
Cross List:
Campus: I Foreign Campus
Status: A Active
Schedule Type: D Seminar
Instructional Method:
Integration Partner:

Place cursor in field, then select Dynamic Help Query from the Help menu

Help Form GUAHELP 8.1

Form ZSASECT
 Block SSBSECT
 Field SSBSECT_INSM_CODE

Banner Local Help Exists?

Display Clear Cancel

ADM Translations

- EDI Cross-Reference Rules form (SOAXREF)
- Institutional Banner codes must be translated to the Regents' standard values on SOAXREF using specific Cross-Reference Labels.

EDI Cross-Reference Rules SOAXREF 8.0

Cross-Reference Label: RGTCLAS Classification/Undergraduates Copy Table: [icon]

Electronic Label	Electronic Qualifier	Regents' Value	EDI	Web	XML	Institutional Value	Description
RGTCLAS		FR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FR	Freshman
RGTCLAS		JR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	JU	Junior
RGTCLAS		SO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO	Sophomore
RGTCLAS		SR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SE	Senior

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

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
- RGTSSSTS
- RGTSCHD
- RGTADDR
- RGTMADD

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Data Entry for Reporting

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

Data Entry for Reporting

- Which institutional office enters this data?
 - SPAIDEN
 - SPAPERS
 - SOATEST
 - SAAADMS
 - SGASTDN
 - SOAHSCH
 - ZOAHSCHD
 - SSASECT
 - ZSASECT
 - SHATRNS
 - ZOAGARP
 - ZOARESI
 - SFAREGS
 - SCACRSE
 - SHADEGR
 - TSAAREV
 - SOAPCOL
 - ZHAHOPE

Data Entry for Reporting

General Person SPAPERS 8.2

ID: 147147147 Special, Guy R.

Biographical

Gender: Male
 Female
 Not Available

Birth Date: 03-MAR-1975

Age: 35

SSN/SIN/TIN: 123123123

Confidential
 Deceased

Citizenship: C U.S. Citizen

Marital Status: M Married

Religion:

Legacy:

Ethnicity: W White (Non-Hispanic Origin)
New Ethnicity: Not Hispanic or Latino
 Ethnicity and Race Confirmed
Confirmed Date: 17-MAR-2009

Veteran File Number:

Veteran Category: None

Active Duty Separation Date:

Armed Forces Service Medal Indicator
 Special Disabled Veteran

Race
W White

- New elements beginning Summer 2009
- Business practice located at http://www.usg.edu/georgia_best/busproc_docs/Race_and_Ethnicity_BP_UserDoc.pdf

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Data Entry for Reporting

Georgia Requirements Form ZOAGARP 8.0

ID: 147147147 Guy Really Special, Junior

Georgia Requirements

NCRQ Code	Description	Requirement Status	Date	Satisfied	Advisor	CPC Desired	CPC Used	History/Constitution Desired	History/Constitution Used
COME	Compass - English	SF	24-JUN-2010	Y					
COMM	Compass - Math	SF	24-JUN-2010	Y					
COMR	Compass - Reading	SF	24-JUN-2010	Y					
CPCE	CPC - English	SH	12-NOV-2009	Y			Y		

Deficiencies

NCRQ Code	Description
CPCE	CPC - English
CPCF	CPC - Foreign Language

Translate CPC and Regents' Test status values on SOAXREF > RGTCPC and RGTRGT.

Holds

Hold: Release Indicator: User: CTAYLOR

Reason: Amount:

From: 07-SEP-2010 To: 31-DEC-2099 Originator:

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Data Entry for Reporting

High School Detail Information Form ZOAHSCD 8.3

ID: 147147147 Guy Really Special, Junior

High School(s) Subjects

Georgia Testing ID
GTID: 1234567890

High School Detail
High School: 110055 Bacon County High School
Graduation Date: 28-APR-2006 Transcript Receive Date:
Class Rank: 25 Class Size: 100 Percentile: 75 High School GPA: 3.00
Admission Checklist Request Code: APCL AP/CLEP Scores Diploma: CP College Preparatory
CPC GPA:

User documentation located at http://www.usg.edu/georgia_best/user_docs/gamod8_o_HighSchoolGTID_userdoc_FINAL.pdf

Non-standard FICE codes must be translated on the FICE and High School Code Translation System web site.

Translate diploma type values on SOAXREF > RGTDPLM.

Data Entry for Reporting

Schedule SSASECT 8.3.0.3

Term: 201002 CRN: 80413 Create CRN: Copy CRN: Subject: ENGL Course: 1101 Title: English Composition I

Course Section Information Section Enrollment Information Meeting Times and Instructor Section Preferences

Subject: ENGL English
Course Number: 1101 Title: English Composition I

Campus: A Main Campus
Status: A Active
Schedule Type: A Lecture
Instructional Method:

Session: A On campus, in assigned space

Part of Term: 1 02-JAN-2008 02-MAY-2008 16

Registration Dates: Start Dates: Maximum Extensions: 0

Long Title Comments Syllabus

CEU Indicator:
Credit Hours: 3.000 None To Or
Billing Hours: 3.000 None To Or
Contact Hours: 3.000 None To Or
Lecture: 3.000 None To Or
Lab: None To Or
Other: None To Or

Link Identifier:
Attendance Method:

Translate schedule type , section status values on SOAXREF > RGTDPLM, RGTSSSTS.

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Data Entry for Reporting

Georgia GPAs Form ZHATERM 8.0

ID: 147147147 Guy Really Special, Junior Level: US Start Term:

Current Standing

First Term Attended: 000000
 Last Term Attended: 200905

Academic Standing:
 Academic Standing Override:

Term and cumulative hours, quality points, and 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



Distance Education

- Course section distance technology information currently entered on Schedule Detail form (SSADETL).

Curriculum Usage of Technology

 Print friendly  Email or share Modified November 13, 2009

Institutions indicated that there was a need for user documentation to support the Curriculum Usage of Technology business practice implemented in Summer 2006. The System Office has developed user documentation, which provides step-by-step instructions for entering the instructional technology and room usage data based on the business practice implemented.

Title	Date Last Revised
 Curriculum Technology User Documentation	January 2007
 Academic Data Mart Data Element Dictionary	January 2007

- http://www.usg.edu/georgia_best/business_processes/curriculum_usage_of_technology/

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Distance Education

- Required for all courses
- Record the primary technology type
- Request to move the data entry location to a more regularly used form.

Schedule Detail SSADETL 8.2.1

Term: 201002 CRN: 80413 Subject: ENGL Course: 1101 Title: English Composition I

Section Links and Corequisites Section Fees Degree Program Attributes **Contract and Block Schedule Information**

Section Contracts

Contract	Description	Percentage	Primary Indicator
06	Internet	100	<input checked="" type="checkbox"/>

10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010

Distance Education

- ZSASECT is a clone of SSASECT which allows Instructional Method field to be updated after registration has occurred for the section.
- New Delivery Technology Tab on ZSASECT
 - Quarter 4 of 2010
- Same fields/table as Section Contracts area of the Contract and Block Schedule Information tab of SSADETL
- Hint text added to the Instructional Method field as reminder to enter delivery technology information

Distance Education

- When ZSASECT enhancement is released...
 - Find out which data entry staff currently enter data on SSADETL and update instructional method on ZSASECT
 - Are these the appropriate people to be responsible for entering the delivery technology information on ZSASECT?
 - Update institutional data entry instructions
 - Distribute information to campus staff
 - Be sure staff are aware of data entry deadline
 - Accurate data entry is vital for accurate data reporting

GeorgiaBEST Learning Library

- Share valuable presentation resources with your peers related to the GeorgiaBEST suite of products through the GeorgiaBEST Community on edu1world.
- To add a presentation to the Learning Library:
 - Log in to the GeorgiaBest edu1world Community.
 - In the top navigation bar, click Documents.
 - Under Folders, click GeorgiaBEST Learning Library.
 - Click Add File to add a new presentation.
- If you have not yet signed up for edu1world, you can send any presentations you want to submit to the Learning Library to nicole.pittard@usg.edu. To sign up for edu1world, go to

<http://www.surveys.usg.edu/se.ashx?s=06C2C3B975686B07>
and request an invitation.

Additional ITS Resources and Support

- To create a new or update an existing production down, business interrupting (emergency) support request, call the ITS Helpdesk immediately
 - 706-583-2001
 - 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 helpdesk@usg.edu

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



10/21/2010

GeorgiaBEST Program Team
Georgia Summit 2010