

Banner General General Overview Training Workbook

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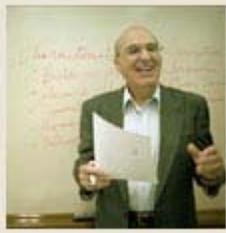
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General System Overview

Lesson: Overview

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Workbook goal

The goal of this workbook is to provide you with an overview of the Banner General module processes, menus and terminology. Separate workbooks detailing the topics found within the General module are available. The workbooks contain detailed information about the forms and processes required for set up and day-to-day operations, as well as knowledge and practice exercises to implement and use the Banner system.

Intended audience

An executive or director who oversees the entire General operation of your enterprise, or a newly hired staff member who needs an overall understanding of the Banner General System

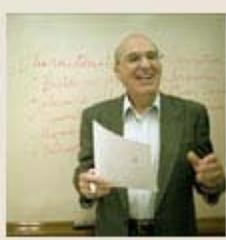
Objectives

At the end of this workbook, you will be able to

- better understand the components of the Banner General System
- navigate through the General main and submenus and explain the purpose of each module
- create QuickFlows and explain how they can be used in the General System

Prerequisites

To complete this workbook, you should have completed the Education Practices computer-based training (CBT) tutorial "Banner 7 Fundamentals," or have equivalent experience navigating in Banner.



General System Overview

Lesson: General System Menu

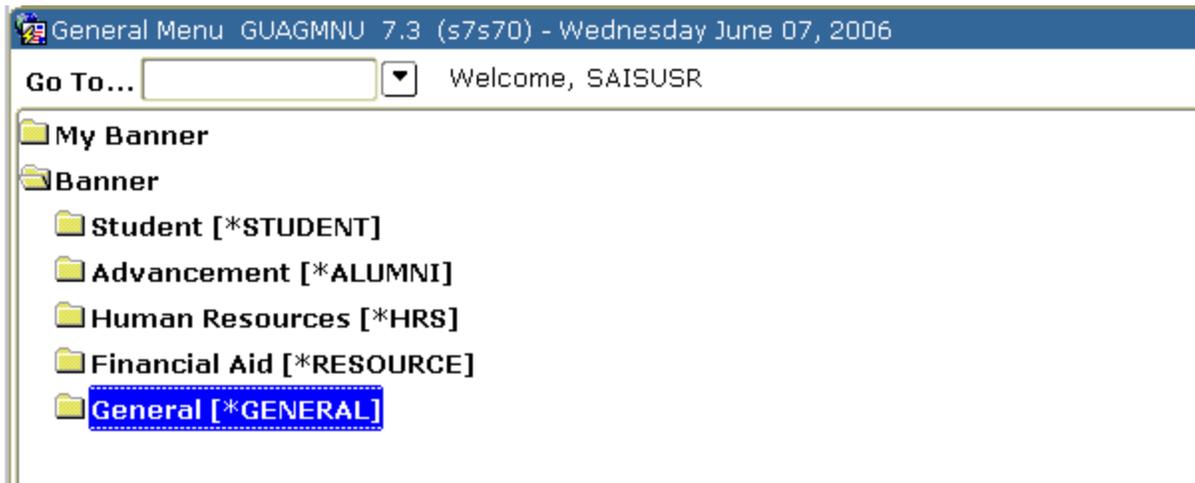
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Introduction

You can use the Banner General main menu to select from a list of the menus, forms, jobs, and QuickFlows. The main menu shows the various levels of menus and submenus available at your institution. Menus are nested. You can easily navigate through Banner by expanding these menus. Personal menus can be tailored to individual needs.

General menu

From the Banner main menu, select the General module.





General System Overview

Lesson: General System Menu (Continued)

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General menu – expanded

The main menu structure displays the topics that make up the General module.

General Menu GUAGMNU 7.3 (s7s70) - Wednesday June 07, 2006

Go To... Welcome, SAISUSR

- My Banner
 - Banner
 - Student [*STUDENT]
 - Advancement [*ALUMNI]
 - Human Resources [*HRS]
 - Financial Aid [*RESOURCE]
 - General [*GENERAL]**
 - Job Submission [*GENJOB]
 - Population Selection [*GENPOPSEL]
 - Letter Generation [*GENLETTER]
 - General International Management [*GENINTL]
 - System Functions/Administration [*GENSYS]
 - Event Management [*GENEVENT]
 - General Web Management [*GENWEB]
 - General Voice Response Management [*GENVR]
 - Business Rule Builder [*GENBUSINESSRULE]



General System Overview

Lesson: Job Submission Menu

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Banner module purpose

The Job Submission module facilitates the submission of reports and processes throughout all of the Banner systems.

Menu

- 📁 **Job Submission [*GENJOB]**
 - 📄 **Process Submission Controls [GJAPCTL]**
 - 📄 **Process Maintenance [GJAJOB]**
 - 📄 **Parameter Definitions [GJAPDEF]**
 - 📄 **Parameter Value Validations [GJAPVAL]**
 - 📄 **Default Parameter Value Validations [GJAPDFT]**
 - 📄 **Job Parameter Set Rules [GJRJPRM]**
 - 📄 **Process Results [GJARSLT]**
 - 📄 **Printer Validation [GTVPRNT]**
 - 📄 **Saved Output Review [GJIREVO]**
 - 📄 **Job Submission Profile Maintenance [GJAJPRF]**
 - 📄 **Sleep Wake Maintenance [GJASWPT]**



General System Overview

Lesson: Job Submission Menu (Continued)

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Accessing the menus

You can access the Job Submission system menu from the Student system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
Process Submission Controls Form (GJAPCTL)	submit a Banner report or job for processing.
Process Maintenance Form (GJAJOBS)	define and store the characteristics of each Banner job and report that can be run at your institution.
Parameter Definitions Form (GJAPDEF)	identify the parameters that control the processing of a report or process, establish validation characteristics for the parameters, and define system-level defaults for the parameters.
Parameter Value Validations Form (GJAPVAL)	define valid values for parameters that control the processing of a report or process.
Default Parameter Value Validations Form (GJAPDFT)	define user-level defaults for the parameters that control the processing of a report or process.
Job Parameter Set Rules Form (GJRJPRM)	define the names of job parameter sets used at your institution.
Process Results Form (GJARSLT)	display a list of reports and processes that were run through Job Submission. Failure messages identify problems in batch processing and COBOL processes that were run online.
Printer Validation Form (GTVPRNT)	define the codes that identify the printers at your institution.
Saved Output Review Form (GJIREVO)	display output from a report or process that was run on the Process Submission Control Form (GJAPCTL) and saved to the database.
Job Submission Profile Maintenance Form (GJAJPRF)	define user-level defaults for the printer and local directory used with the Saved Output Review Form (GJIREVO) and the directory used to save output from Pro*C jobs run with the Process Submission Control Form (GJAPCTL).
Sleep Wake Maintenance Form (GJASWPT)	monitor and control sleep/wake processing that has been set up for specific Banner processes in the Student System and the Accounts Receivable System.



General System Overview

Lesson: Job Submission Menu (Continued)

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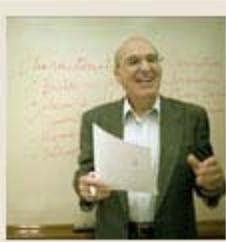
Key points

In the Job Submission module, you can

- submit a Banner report or process for processing
- define the characteristics of each Banner report or process that can be run at your institution
- define the parameters that control the processing of a report or process
- define user-level defaults for the parameters that control the processing of a report or process
- display output from a report or process that was run through Job Submission and saved to the database.

Associated workbooks

For additional information and training exercises on this topic, see the workbook titled "Banner General Job Submission," as well as the Job Submission lesson later in this workbook.



General System Overview

Lesson: Population Selection Menu

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Banner module purpose

The Population Selection module lets you identify and group entities in the database (for example, people, vendors, and organizations). You can define selection criteria to identify and extract a subset of these entities to use in Banner reports, processes, and letters.

Menu

- 📁 **Population Selection [*GENPOPSEL]**
 - 📄 Population Selection Extract Inquiry [GLIEXTR]
 - 📄 Population Selection Extract Data [GLAEXTR]
 - 📄 Population Selection Definition Rules [GLRSLCT]
 - 📄 Population Selection Inquiry [GLISLCT]
 - 📄 Application Definition Rules [GLRAPPL]
 - 📄 Application Inquiry [GLIAPPL]
 - 📄 Variable Rules Definitions [GLRVRBL]
 - 📄 Variable Inquiry [GLIVRBL]
 - 📄 Object Definition Rules [GLROBJT]
 - 📄 Object Inquiry [GLIOBJT]
 - 📄 System Indicator Validation [GTVSYSI]



General System Overview

Lesson: Population Selection Menu (Continued)

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Accessing the menus

You can access the Population Selection system menu from the GENERAL system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
Population Selection Definition Rules Form (GLRSLCT)	define a population selection, which is a set of rules used to select IDs from the Banner database for reports, processes, and letters.
Population Selection Extract Data Process (GLBDATA)	select a population based on the rules entered on the Population Selection Definition Rules Form (GLRSLCT).
Population Selection Extract Data Form (GLAEXTR)	manually create, change, and display a population, which is a set of Banner IDs used for reports, processes, and letters.
Population Selection Extract Inquiry Form (GLIEXTR)	display a population, which is a set of Banner IDs used for reports, processes, and letters.
Population Selection Inquiry Form (GLISLCT)	display a list of population selections within an application.
Application Definition Rules Form (GLRAPPL)	define an application, which is a functional area that controls population selections, populations, and variables.
Application Inquiry Form (GLIAPPL)	display a list of all applications defined on the GLRAPPL Form.
Variable Rules Definitions Form (GLRVRBL)	define a variable, which is a specific piece of data in the database and the set of rules used to select that data.
Variable Inquiry Form (GLIVRBL)	display a list of the variables defined on the GLRVRBL Form for an application.
Object Definition Rules Form (GLROBJT)	defines an object, which is a set of common rules used in many different population selections and variables.
Object Inquiry Form (GLIOBJT)	display a list of objects defined on the GLROBJT Form.
System Indicator Validation Form (GTVSYSI)	define codes that identify the Banner applications used at your institution.



General System Overview

Lesson: Population Selection Menu (Continued)

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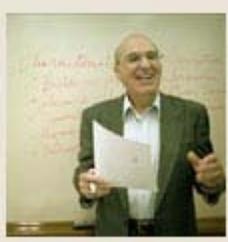
Key points

In the Population Selection module, you can

- manually create, change, and display a population of IDs for reports, processes, and letters.
- define the rules used to select IDs from the Banner database for reports, processes, and letters
- define the functional areas (applications) used in the Population Selection and Letter Generation modules
- define the variables used in the Population Selection and Letter Generation modules to select a specific piece of data in the database
- define common rules, or objects, that are used in many different population selections and variables.

Associated workbooks

For additional information and training exercises on this topic, see the workbook titled “Banner General Population Selection.”



General System Overview

Lesson: Letter Generation Menu

◀ Jump to TOC

Banner module purpose

The Letter Generation module lets you generate letters or produce a download file that can be used to produce letters with Microsoft Word or WordPerfect.

Menu

- 📁 General [*GENERAL]
 - 📁 Job Submission [*GENJOB]
 - 📁 Population Selection [*GENPOPSEL]
 - 📁 Letter Generation [*GENLETTER]
 - 📄 Mail Query [GUIMAIL]
 - 📄 Letter Process [GUALETR]
 - 📄 Paragraph Process [GUAPARA]
 - 📄 Variable Rules Definitions [GLRVRBL]
 - 📄 Variable Inquiry [GLIVRBL]
 - 📄 Object Definition Rules [GLROBJT]
 - 📄 Object Inquiry [GLIOBJT]
 - 📄 Application Definition Rules [GLRAPPL]
 - 📄 Application Inquiry [GLIAPPL]
 - 📄 Letter Code Validation [GTVLETR]
 - 📄 Paragraph Code Validation [GTVPARA]
 - 📄 System Indicator Validation [GTVSYSI]



General System Overview

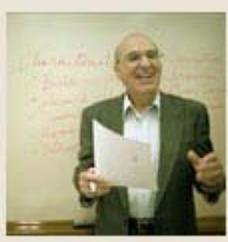
Lesson: Letter Generation Menu (Continued)

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Accessing the menus

You can access the Letter Generation system menu from the General system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
Mail Query Form (GUIMAIL)	list printed letters and pending letters (those waiting to be sent) for an ID.
Letter Process (GUALETR)	build a letter from paragraphs created on the Paragraph Form (GUAPARA).
Paragraph Form (GUAPARA)	build a paragraph that can be inserted in letters on the Letter Process Form (GUALETR). A paragraph can include text, variables, and formatting commands.
Variable Rules Definitions Form (GLRVRBL)	define a variable, which is a specific piece of data in the database and the set of rules used to select that data.
Variable Inquiry Form (GLIVRBL)	display a list of the variables defined on the GLRVRBL Form for an application.
Object Definition Rules Form (GLROBJT)	define an object, which is a set of common rules used in many different population selections and variables.
Object Inquiry Form (GLIOBJT)	display a list of objects defined on the GLROBJT Form.
Application Definition Rules Form (GLRAPPL)	define an application, which is a functional area that controls population selections, populations, and variables.
Application Inquiry Form (GLIAPPL)	display a list of all applications defined on the GLRAPPL Form.
Letter Code Validation Form (GTVLETR)	define codes that identify the letters you can generate in Banner.
Paragraph Code Validation Form (GTVPARA)	define codes that identify the paragraphs used in Banner letters.
System Indicator Validation Form (GTVSYSI)	define codes that identify the Banner applications used at your institution.



General System Overview

Lesson: Letter Generation Menu (Continued)

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Key points

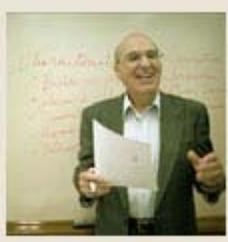
In the Letter Generation module, you can

- define the functional areas (applications) used in the Population Selection and Letter Generation modules
- define common rules (objects) that are used in many different population selections and variables
- define the variables used in the Population Selection and Letter Generation modules to select a specific piece of data in the database
- build paragraphs that include user-created text, variables, and formatting commands
- build a letter from these paragraphs
- extract variable data from the database for pending letters, or for a specific letter and selected population. (You can use the Population Selection module or a specific Banner process to select the population.)
- merge the extracted variable data into the letter and generate letters, or produce a download file for Microsoft Word or WordPerfect.

Note: SunGard Higher Education does not support WordPerfect 8.0 and higher.

Associated workbooks

For additional information and training exercises on this topic, see the workbook titled “Banner General Letter Generation.”



General System Overview

Lesson: General International Management Menu

◀ Jump to TOC

Banner module purpose

The General International Management module lets you store information about foreign students attending your institution and create reports with that information. It has been designed to help institutions meet the requirements of the United States Bureau of Citizenship and Immigration Services (BCIS). If your institution is not located in the USA, you may not need this module.

Menu

- 📁 General [*GENERAL]
 - 📁 Job Submission [*GENJOB]
 - 📁 Population Selection [*GENPOPSEL]
 - 📁 Letter Generation [*GENLETTER]
 - 📁 **General International Management [*GENINTL]**
 - 📁 General Multi Visa [*GENMVISA]
 - 📁 General SEVIS [*GENSEVIS]

Accessing the menus

You can access the General International Management system menu from the General system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
General Multi Visa menu (*GENINTL)	access the menus that help you track visa information for students, applicants, and employees.
General SEVIS menu (*GENSEVIS)	access the menus that help you manage your institution's relationship with the Bureau.

Key points

In the General International Management module, you can

- store and maintain visa information for students, applicants, and employees
- track visas for students, applicants and employees
- create reports to track expiring visa documents
- create SEVIS records to be sent to the Bureau
- collect and report on race/ethnicity codes.



General System Overview

Lesson: System Functions / Administration Menu

◀ Jump to TOC

Banner module purpose

The System Functions/Administration module lets you set up, operate, and monitor Banner. Many forms in this module are used primarily by members of your data center to define and monitor the ongoing use of the system. Other forms are useful to end users.

Menu

- 📁 **System Functions/Administration [*GENSYS]**
 - 📁 Banking and Currency [*GENCURRE]
 - 📁 Electronic Data Interchange [*GENEDI]
 - 📁 Desktop Tools [*GENDTOOLS]
 - 📁 Electronic Documents [*GENWFED]
 - 📁 Event Queue Maintenance [*GENEQS]
 - 📁 Menu/Preference Maintenance [*GENMENU]
 - 📁 Object Maintenance [*GENOBS]
 - 📁 QuickFlow Process [*GENQUIK]
 - 📁 Miscellaneous General Forms [*GENMISC]
 - 📁 Fine-Grained Access Control [*GENFGAC]
 - 📁 Common Matching [*GENMATCH]
 - 📁 Integration Component Management [*GENINTCOMP]



General System Overview

Lesson: System Functions / Administration Menu (Continued)

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Accessing the menus

You can access the System Functions / Administration system menu from the General system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
Banking and Currency menu (*GENCURRE)	access the forms used to define currency codes, bank codes, bank routing information, and direct deposit information.
Electronic Data Interchange menu (*GENEDI)	access the forms used to maintain EDI information.
Desktop Tools menu (*GENDTOOLS)	access the forms used to define the codes and rules used by the Desktop Tools application.
Electronic Documents menu (*GENWFED)	access the forms used to create and modify electronic documents.
Event Queue Maintenance menu (*GENEQS)	access the forms used to define the codes and rules used by the Event Queue Maintenance module.
Menu / Preference Maintenance menu (*GENMENU)	access the forms used to customize menus for your institution, change an Oracle password, establish personal preferences for the logged in user ID, create personal menus, and copy personal menus.
Object Maintenance Menu (*GENOBS)	access the forms used to create Banner objects.
QuickFlow Process menu (*GENQUIK)	access the forms used to define and submit QuickFlows.
Miscellaneous General Forms menu (*GENMISC)	access miscellaneous General forms.
Fine-Grained Access Control menu (*GENFGAC)	Access forms related to Fine-Grain Access Control.
Common Matching menu (*GENMATCH)	access forms used to define the codes and rules used by the Common Matching module.
Integration Component Management menu (*GENINTCOMP)	access Integration Components forms.



General System Overview

Lesson: System Functions / Administration Menu (Continued)

◀ [Jump to TOC](#)

Key points

In the System Functions / Administration module, you can

- define the currency codes used in the system
- define bank codes, bank routing information, and direct deposit information
- display and maintain information used with EDI (Electronic Data Interchange)
- define the codes and rules used by the Desktop Tools application to access data from a PC application
- create and modify electronic documents
- create new transactions based on electronic documents
- define the codes and rules used by the Event Queue Maintenance module to
- define and track events as they occur in the Banner database
- create and maintain custom menus for your institution
- create or copy personal menus
- establish personal preferences for the logged in user ID
- create new objects
- define and submit QuickFlows
- set up VBS (Value Based Security)
- track changes to a Social Security Number (SSN), Social Insurance Number (SIN), or Tax Filing Number (TFN)
- cross-reference institution-defined codes with valid integration partner system codes.



General System Overview

Lesson: Event Management Menu

◀ Jump to TOC

Banner module purpose

The Banner Event Management module helps you manage an event and the functions, tasks, and participants associated with the event.

Menu

- 📁 **Event Management [*GENEVENT]**
 - 📁 Event/Function Processing [*GENEVPROC]
 - 📁 Event/Function Inquiry [*GENEVQRY]
 - 📁 Event/Function Controls [*GENEVCONT]

Accessing the menus

You can access the Event Management system menu from the General system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
Event / Function Processing menu (*GENEVPROC)	define events, functions, tasks, participants, attendance information, buildings and rooms related to your institution.
Event / Function Inquiry menu (*GENEVQRY)	display information about invitees and their guests, events, functions and related data.
Event / Function Controls menu (*GENEVCONT)	access the forms that build, maintain, and display the validation tables used by the Event Management module.



General System Overview

Lesson: Event Management Menu (Continued)

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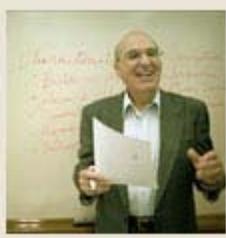
Key points

In the Event Management module, you can

- schedule dates and date ranges, times, buildings, and rooms
- organize administrative tasks associated with functions
- determine financial requirements, including fee and rate structures, budgets, costs, anticipated income, and actual income
- arrange for speakers, entertainment, ticketing, invitations, and mailings
- track anticipated attendance and actual attendance.

Associated workbooks

For additional information and training exercises on this topic, see the workbook titled “Banner General Event Management.”



General System Overview

Lesson: General Web Management Menu

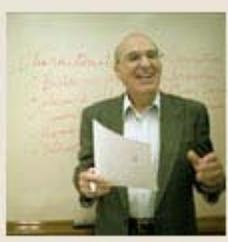
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Banner module purpose

The General Web Management module supports the integrated processing between Banner and your Web applications (Student Self-Service, Faculty/Advisor Self-Service, Employee Self-Service, Advancement Self-Service, Finance Self-Service, and Executive Self-Service).

Menu

- 📁 **General Web Management [*GENWEB]**
 - 📄 Third Party Access [GOATPAC]
 - 📄 Third Party Access Audit [GOATPAD]
 - 📄 E-mail Address [GOAEMAL]
 - 📄 Address Role Privileges [GOAADRL]
 - 📄 Address Review and Verification [GOAADRR]
 - 📄 Directory Options Rules [GOADIRO]
 - 📄 Web User Directory Profile [GOADPRF]
 - 📄 Survey Response Query [GOISRVY]
 - 📄 Survey Definitions [GUASRVY]
 - 📄 Survey Summary Query [GUISRVY]
 - 📄 Third Party Procedure and Parameters [GOAFNXR]
 - 📄 Third Party Electronic Control Rules [GORTCTL]
 - 📄 Enterprise PIN Preferences [GUAPPRF]
 - 📄 Directory Item Validation [GTVDIRO]
 - 📄 E-mail Address Type Validation [GTVEMAL]



General System Overview

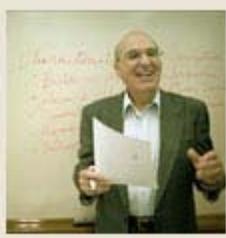
Lesson: General Web Management Menu (Continued)

◀ Jump to TOC

Accessing the menus

You can access the General Web Management system menu from the General system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
Third Party Access Form (GOATPAC)	update PIN information and provides mechanism for resetting a PIN.
Third Party Access Audit Form (GOATPAD)	establish PINs and PIN information for accessing third party products.
E-Mail Address Form (GOAEMAL)	record one or more e-mail addresses for any Banner ID.
Address Role Privileges Form (GOAADRL)	associate address type codes from the Address Type Code Validation Form (STVATYP) with user roles and access privileges.
Address Review and Notification Form (GOAADDR)	display addresses added or changed within Banner or via the Web.
Directory Options Rules Form (GOADIRO)	identify the kinds of information that are included in your Student, Employee, and Advancement Self-Service directories.
Web User Directory Profile (GOADPRF)	define the profile information that appears on the Web directory for an ID.
Survey Response Query Form (GOISRKY)	display responses to surveys, by person.
Survey Definitions Form (GUASRVY)	define a survey.
Survey Summary Query (GUISRVS)	display responses to surveys, by survey
Third Party Procedure and Parameters Form (GOAFNXR)	view functions and transactions used by third-party products.
Third Party Electronic Control Rules Form (GORTCTL)	define controls for Banner interfaces with third-party products.
Enterprise PIN Preferences Form (GUAPPRF)	define institutional preferences for handling PINs.
Directory Item Validation Form (GTVDIRO)	define codes for the types of information included in directory profiles.
E-Mail Address Type Validation Form (GTVEMAL)	define e-mail address type codes (for example, business, personal, and school).



General System Overview

Lesson: General Web Management Menu (Continued)

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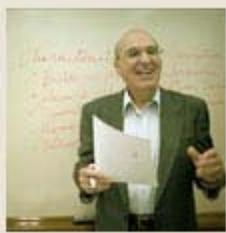
Key points

In the General Web Management module, you can

- associate address type codes with user roles and access privileges
- display addresses added or changed within Banner or via the Web
- define PINs and other user parameters for third-party access products
- define controls for Banner interfaces with third-party products
- identify the kinds of information that are included in your student, employee, and alumni directories
- define the profile information that appears on the Web directory for an ID
- record one or more e-mail addresses for any Banner ID
- set up and track surveys.

Associated workbooks

Refer to the [Banner Middle Tier Implementation Guide](#) for more information.



General System Overview

Lesson: General VR Management Menu

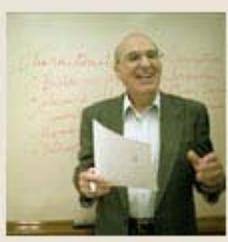
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Banner module purpose

Voice Response is a Banner software option available for Banner Student and Banner Financial Aid Systems that supports touch-tone telephone data entry and inquiry for student information. Voice Response includes Registration, Grade Reporting, Billing, Financial Aid, and Admissions modules.

Menu

- 📁 **General Voice Response Management [*GENVR]**
 - 📄 **Voice Response Admissions Term Based Rules [GORADMS]**
 - 📄 **Voice Response Billing Term Based Rules [GORBILL]**
 - 📄 **VR Financial Aid Year/Term Based Rules [GORAWPD]**
 - 📄 **VR Registration & Grading Term Based Rules [GORRGTM]**
 - 📄 **VR Registration Status [GORRSTS]**



General System Overview

Lesson: General VR Management Menu (Continued)

◀ Jump to TOC

Accessing the menus

You can access the General VR Management system menu from the General system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
VR Admissions Term Based Rules Form (GORADMS)	maintain basic information about the VR Admissions module.
VR Billing Term Based Rules Form (GORBILL)	maintain information about billing terms and dates, and billing deadline dates.
VR Financial Aid Year / Term Based Rules Form (GORAWPD)	maintain basic information about the VR Financial Aid module.
VR Registration & Grading Term Based Rules Form (GORRGTM)	maintain basic registration and grading information.
VR Registration Status Form (GORRSTS)	maintain the status information for the VR Registration module.

Key points

In the General VR Management module, you have access to:

- Direct student access to online registration, billing, admissions, financial aid, and/or grade information from a touch-tone telephone through a series of simple entries — student ID, Personal Identification Number (PIN), menu selections, and course request numbers.
- Modifiable voice response system messages.
- Easy-to-use Oracle tables for modification of system responses.

Associated workbooks

Refer to the [Banner Voice Response Implementation Guide](#) for details.



General System Overview

Lesson: Business Rule Builder Menu

◀ Jump to TOC

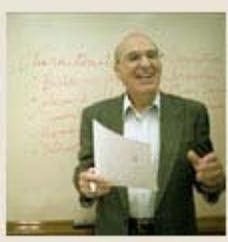
Banner module purpose

To help you manage your Banner data for SEVIS processing, General includes forms you can use to build business rules. The rules you create can be used to populate columns in Banner tables with values from other columns. Your rules can also create student and exchange visitor records automatically.

These forms are in a separate module because you could use them for other purposes, rather than just for SEVIS reporting.

Menu

-  **Business Rule Builder [*GENBUSINESSRULE]**
-  **Business Rule Code Validation [GTYSQRU]**
-  **Business Rule Process Code Validation [GTYSQPR]**
-  **Business Rule Parameter Code Validation [GTYSQPA]**
-  **Business Rule Process Parameters [GORSQPA]**
-  **Business Rules [GORRSQL]**
-  **Business Rule Inquiry [GOIRSQL]**



General System Overview

Lesson: Business Rule Builder Menu (Continued)

◀ Jump to TOC

Accessing the menus

You can access the Business Rules system menu from the General system menu (*GENERAL). This menu displays these submenus:

Sub Menu/Form	Enables you to...
Business Rule Code Validation Form (GTVSQRU)	maintain the rule codes that will be used in your dynamic SQL statements. For SEVIS reporting, you might want to set up rule codes such as <i>Create Student, Update Major</i> , etc.
Business Rule Process Code Validation Form (GTVSQPR)	maintain the process codes that are valid for dynamic query processing. The delivered value is <i>SEVIS</i> .
Business Rule Parameter Code Validation Form (GTVSQPA)	maintain the parameters or variables you will use to build your process rules on the Business Rules Form (GORRSQL). You will use the codes you define on this form in the dynamic SQL statements on GORRSQL.
Business Rule Process Parameters Form (GORSQPA)	associate a process code with the parameter codes it will use on GORRSQL. The valid parameter codes are defined on the Business Rule Parameter Code Validation Form (GTVSQPA).
Business Rules Form (GORRSQL)	build SQL statements that will perform certain functions when they are executed from the SEVIS Batch Extract Process (GORSEVE).
Business Rule Inquiry Form (GOIRSQL)	view business rules.



General System Overview

Lesson: Creating a Personal Menu

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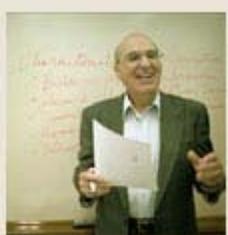
Overview

My Banner is a “personal menu” that appears at the top of the Banner main menu and in the product links bar. My Banner allows quick access to forms, jobs, menus, and QuickFlows that are most important in your daily work.

General Menu GUAGMNU 7.2 (c700) - Wednesday June 07, 2006

Go To... Welcome, SAISUSR

- My Banner**
 - Basic Course Information [SCACRSE]
 - Housing [HOUS]
 - General Person Identification [SPAIDEN]
 - Catalog Prerequisite and Test Score Restrictions [SCAPREQ]
 - Course Registration Restrictions [SCARRES]
 - Schedule [SSASECT]
 - Schedule Detail [SSADETL]
 - Room Definition [SLARDEF]
 - International Information [GOAINTL]
 - Catalog Prerequisite and Test Score Restrictions [SCAPREQ]
 - Organize My Banner [GUAPMNU]



Section A: Introduction

Lesson: Creating a Personal Menu (Continued)

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Procedure, continued

Step	Action
3	In the left pane, use your mouse to select each object you want to add to the menu. When you select an object, the name is highlighted. <u>Note:</u> You can hold down the Shift key to select more than one object.
4	Repeat steps 2 and 3 for each object type you want to add to the menu.
5	Click in the right pane where you want to place the new menu items.
6	Click the Insert Selection button in the middle of the form.
7	Customize the object descriptions. <u>Note:</u> This is optional.
8	Click the Save icon.



General System Overview

Lesson: User Preferences

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User preferences

User preferences are set and maintained on the General User Preferences Maintenance Form (GUAUPRF).

General User Preferences Maintenance GUAUPRF 7.2 (c700)

Display Options Directory Options My Links Menu Settings LDAP

Display Options

- Display Form Name on Title Bar
- Display Form Name on Menu
- Display Release Number on Title Bar
- Display Database Instance on Title Bar

Alert Options

- Prompt Before Exiting Banner
- Display Additional Confidential Warning
- Display Additional Deceased Warning

User Interface Color Settings

Description:	Enter the RGB color code for non iconic buttons.
Default Value:	r204g204b153
User Value:	r204g204b153
Description:	Enter the RGB color code for the canvas.
Default Value:	r255g255b255
User Value:	r255g255b153
Description:	Enter the RGB color code for code/description prompts.
Default Value:	r0g0b0
User Value:	r0g0b255
Description:	Enter the RGB color code for the menu links canvas.
Default Value:	r255g255b255
User Value:	r255g255b255
Description:	Enter the RGB color code for the menu broadcast message canvas.
Default Value:	r255g255b255
User Value:	r255g255b255

Check to have form name display on window title.
Record: 1/1 ... <OSC>

Display Options tab

This tab controls the appearance of Banner forms. Selectable options include toggling display of form names, release numbers and database instances on forms, prompts warning users about exiting Banner, accessing confidential information or accessing records of deceased students, and color options for Banner forms.



General System Overview

Lesson: User Preferences (Continued)

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Directory Options tab

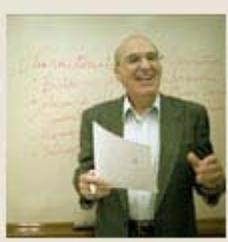
This tab allows default values to be set for a variety of directory options.

General User Preferences Maintenance GUAUPRF 7.2 (c700)

Display Options **Directory Options** My Links Menu Settings LDAP

Description:	Internet Native data extract format: FILE (.csv) or TEXT
Default Value:	FILE
User Value:	TEXT
Description:	Enter the location for your online help for web access.
Default Value:	http://malweb12.sct.com:7784/bannerOH/bannerOH
User Value:	http://malweb12:7784/bannerOH/bannerOH
Description:	Enter the location of your Banner ID images.
Default Value:	c:\YourImageDirectory
User Value:	
Description:	Enter the name of your Oracle Reports server.
Default Value:	http://your.report.server/ows-bin/rwogi60.exe?
User Value:	
Description:	Enter the name of your Oracle Reports Service Name.
Default Value:	YourServiceName
User Value:	

Enter user specific settings.
Record: 1/6 | ... | <OSC>



General System Overview

Lesson: User Preferences (Continued)

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My Links tab

This tab allows you to set URL destinations for the links found on Banner's main page.

General User Preferences Maintenance GUAUPRF 7.2 (c700)

Display Options Directory Options **My Links** Menu Settings LDAP

Description: Enter the URL for the "My Institution" link.
Default Value: http://www.sungardstct.com/
User Value:

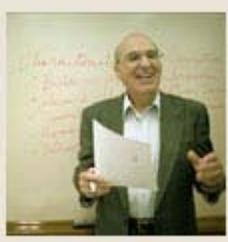
Description: Enter the description for the "My Personal Link 1" link.
Default Value: Your first personal link description
User Value: Home Page

Description: Enter the URL or Banner object for the "My Personal Link 1" link.
Default Value: Your first personal link URL
User Value: http://www.appstate.edu

Description: Enter the description for the "My Personal Link 2" link.
Default Value: Your second personal link description
User Value: GTVSDAX

Description: Enter the URL or Banner object for the "My Personal Link 2" link.
Default Value: Your second personal link URL
User Value: GTVSDAX

Enter user specific settings.
Record: 1/13 | ... | <OSC>



General System Overview

Lesson: User Preferences (Continued)

◀ Jump to TOC

Menu Settings tab

This tab allows default starting menus to be set for a user or an institution.

General User Preferences Maintenance GUAUPRF 7.2 (c700)

Display Options Directory Options My Links **Menu Settings** LDAP

Starting Menu Option

Description:	<input type="text" value="Enter the name of your preferred start-up menu."/>
Institution Default:	<input type="text" value="*/MENU"/> <input type="button" value="v"/> Products Menu
User Default:	<input type="text" value="*/MENU"/> <input type="button" value="v"/> Products Menu

LDAP tab

Use this to store the options for LDAP and Single Socket Layer (SSL) for your institution.

Note: Only the BASELINE user has access to this tab.



General System Overview

Lesson: Creating and Using QuickFlows

◀ Jump to TOC

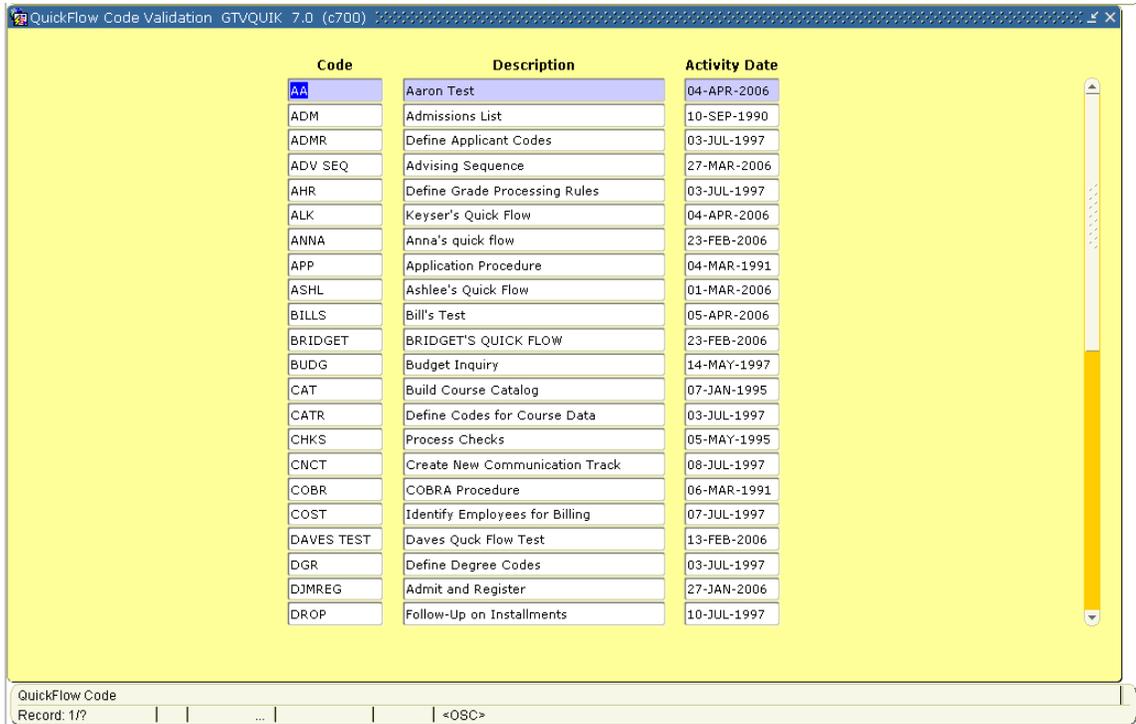
Description

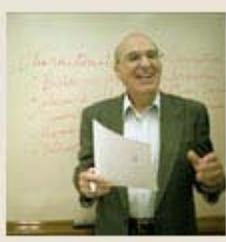
The QuickFlow form (GUAQFLW) permits you to call the defined sequence of forms established by the QuickFlow Definition Form (GUAQUIK). When you enter the QuickFlow name and click **Start**, the system executes the first form defined in the QuickFlow list. After you exit the first form in the list, the system executes the second form in the QuickFlow list. This pattern continues until the system executes all of the forms in the QuickFlow list.

Note: You can only execute QuickFlow lists that were defined in the GUAQUIK form. Define the QuickFlow code with the QuickFlow Code Validation Form (GTVQUIK).

Procedure

Create a QuickFlow for a process that requires many different forms to be completed. Your instructor will identify the appropriate form names to use.

Step	Action																																																																					
1	<p>Access the QuickFlow Code Validation form (GTVQUIK).</p>  <table border="1"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Activity Date</th> </tr> </thead> <tbody> <tr><td>AA</td><td>Aaron Test</td><td>04-APR-2006</td></tr> <tr><td>ADM</td><td>Admissions List</td><td>10-SEP-1990</td></tr> <tr><td>ADMR</td><td>Define Applicant Codes</td><td>03-JUL-1997</td></tr> <tr><td>ADV SEQ</td><td>Advising Sequence</td><td>27-MAR-2006</td></tr> <tr><td>AHR</td><td>Define Grade Processing Rules</td><td>03-JUL-1997</td></tr> <tr><td>ALK</td><td>Keyser's Quick Flow</td><td>04-APR-2006</td></tr> <tr><td>ANNA</td><td>Anna's quick flow</td><td>23-FEB-2006</td></tr> <tr><td>APP</td><td>Application Procedure</td><td>04-MAR-1991</td></tr> <tr><td>ASHL</td><td>Ashlee's Quick Flow</td><td>01-MAR-2006</td></tr> <tr><td>BILLS</td><td>Bill's Test</td><td>05-APR-2006</td></tr> <tr><td>BRIDGET</td><td>BRIDGET'S QUICK FLOW</td><td>23-FEB-2006</td></tr> <tr><td>BUDG</td><td>Budget Inquiry</td><td>14-MAY-1997</td></tr> <tr><td>CAT</td><td>Build Course Catalog</td><td>07-JAN-1995</td></tr> <tr><td>CATR</td><td>Define Codes for Course Data</td><td>03-JUL-1997</td></tr> <tr><td>CHKS</td><td>Process Checks</td><td>05-MAY-1995</td></tr> <tr><td>CNCT</td><td>Create New Communication Track</td><td>08-JUL-1997</td></tr> <tr><td>COBR</td><td>COBRA Procedure</td><td>06-MAR-1991</td></tr> <tr><td>COST</td><td>Identify Employees for Billing</td><td>07-JUL-1997</td></tr> <tr><td>DAVES TEST</td><td>Daves Quck Flow Test</td><td>13-FEB-2006</td></tr> <tr><td>DGR</td><td>Define Degree Codes</td><td>03-JUL-1997</td></tr> <tr><td>DJMREG</td><td>Admit and Register</td><td>27-JAN-2006</td></tr> <tr><td>DROP</td><td>Follow-Up on Installments</td><td>10-JUL-1997</td></tr> </tbody> </table> <p>QuickFlow Code Validation GTVQUIK 7.0 (c700)</p> <p>QuickFlow Code Record: 1/?</p>	Code	Description	Activity Date	AA	Aaron Test	04-APR-2006	ADM	Admissions List	10-SEP-1990	ADMR	Define Applicant Codes	03-JUL-1997	ADV SEQ	Advising Sequence	27-MAR-2006	AHR	Define Grade Processing Rules	03-JUL-1997	ALK	Keyser's Quick Flow	04-APR-2006	ANNA	Anna's quick flow	23-FEB-2006	APP	Application Procedure	04-MAR-1991	ASHL	Ashlee's Quick Flow	01-MAR-2006	BILLS	Bill's Test	05-APR-2006	BRIDGET	BRIDGET'S QUICK FLOW	23-FEB-2006	BUDG	Budget Inquiry	14-MAY-1997	CAT	Build Course Catalog	07-JAN-1995	CATR	Define Codes for Course Data	03-JUL-1997	CHKS	Process Checks	05-MAY-1995	CNCT	Create New Communication Track	08-JUL-1997	COBR	COBRA Procedure	06-MAR-1991	COST	Identify Employees for Billing	07-JUL-1997	DAVES TEST	Daves Quck Flow Test	13-FEB-2006	DGR	Define Degree Codes	03-JUL-1997	DJMREG	Admit and Register	27-JAN-2006	DROP	Follow-Up on Installments	10-JUL-1997
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2	Perform an Insert Record function.																																																																					
3	Enter a QuickFlow code in the QuickFlow field per your instructor.																																																																					

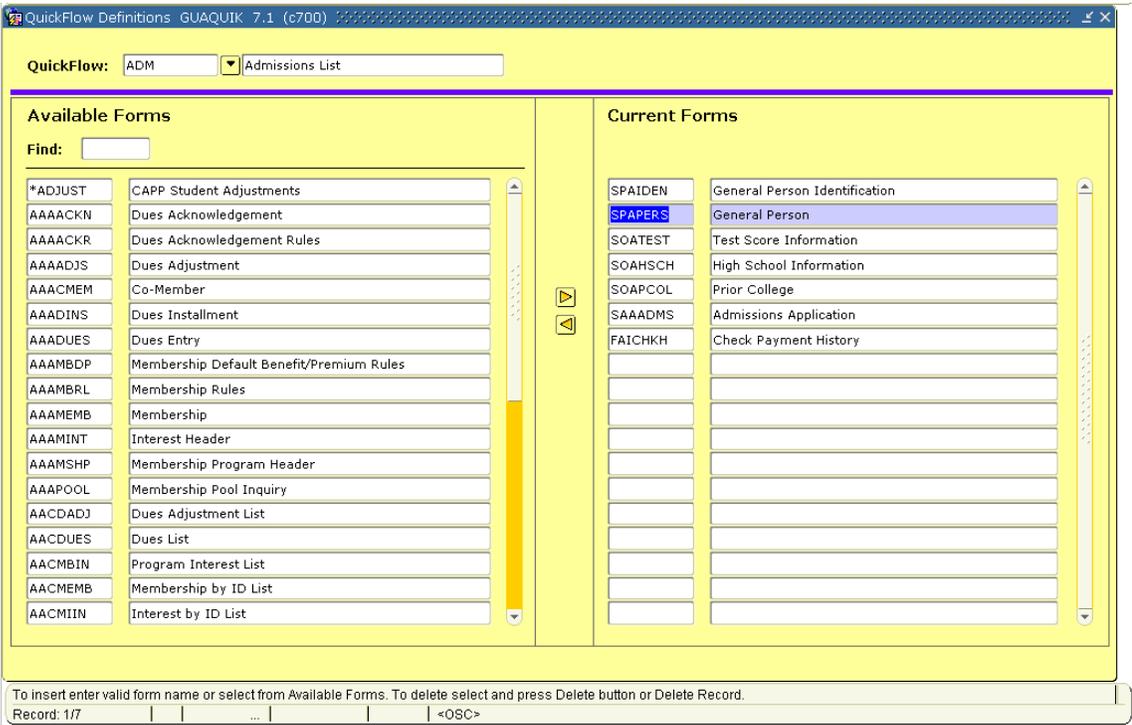


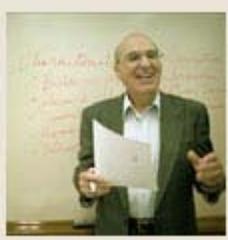
General System Overview

Lesson: Creating and Using QuickFlows (Continued)

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Procedure, continued

Step	Action
4	Enter a description in the Description field of the QuickFlow code per your instructor.
5	Click the Save icon.
6	Click the Exit icon.
7	Access the QuickFlow Definition form (GUAQUIK). 
8	Enter the code in the QuickFlow field you just created on the QuickFlow Code Validation form (GTVQUIK).
9	Perform the Next Block function.
10	Enter the form name(s) required for the QuickFlow process in the Existing field in the order you will process the information.

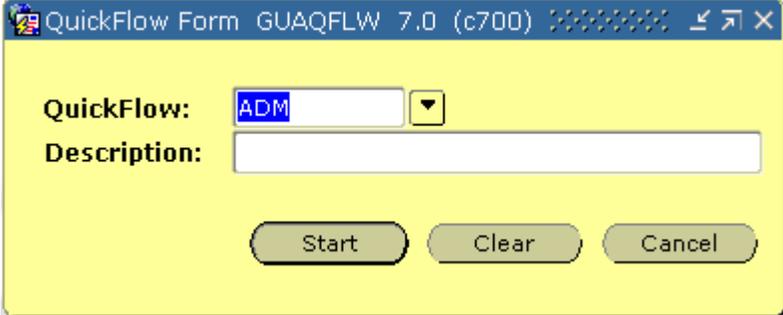


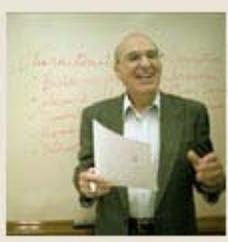
General System Overview

Lesson: Creating and Using QuickFlows (Continued)

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Procedure, continued

Step	Action
11	Enter the forms in the order they should be accessed. <u>Note:</u> You can use the Find field to search for the required form, using the % sign as a wildcard.
12	Click the Save icon.
13	Click the Exit icon.
14	Access the QuickFlow form (GUAQFLW). 
15	Enter the name of the QuickFlow process that you created in Step 3 in the QuickFlow field or the down arrow to find it... <u>Note:</u> You can also access QuickFlows by typing the QuickFlow code in the Go To field. 
16	Click the Start button.
17	Exit through each of the forms in the process to return to the QuickFlow form.
18	Click the Exit icon.



General System Overview

Lesson: Data Extraction

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Managing the Data Extract Feature

Banner is delivered with the data extract feature enabled on all validation forms. With this feature, you can extract data from a Banner form to a spreadsheet. You can extract detail data from the current block with or without data from the key block.

SunGard Higher Education also supports the extract feature on a limited number of rule, application, and inquiry forms where the feature has been tested. The system administrator at your institution can enable the extract feature on any form that has been tested.

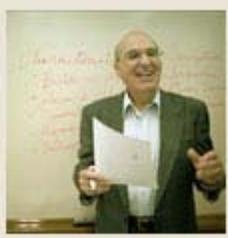
Note: Extract results are unpredictable on forms that have not been tested with this feature. If you want to extract data on an untested form, you can consider enabling the extract feature on GUAOBS. SunGard Higher Education does not support this feature on untested forms, but will, however, continue to test more forms and expand support with future releases.

Enabling the Data Extract Feature for a Form

Warning: If you wish to enable the extract feature on local forms, you must test the extract feature on them before you enable the feature on GUAOBS.

Procedure

Step	Action
1	Access the Object Maintenance Form (GUAOBS).
2	Select a value from the pull-down list in the Data Extract Option field: <ul style="list-style-type: none">• <i>Key and Data Block</i> Enable the extract feature for both key and data blocks.• <i>Data Block Only</i> Enable the extract feature for data blocks only.



General System Overview

Lesson: Data Extraction (Continued)

◀ Jump to TOC

Changing the Default Directory Location for Extract Files

SunGard Higher Education delivers Banner with **C:\temp** as the default directory for extract files.

The system administrator at your institution can use the General User Preferences Maintenance Form (GUAUPRF) to change this default value to meet your institutional needs. Only those staff members with appropriate security can perform this task.

- Choose the directory location carefully. The directory must be available from the Web server. If you keep the default C:\temp directory, extract files will go to C:\temp on the Web server.
- Carefully consider the security implications.
- In addition, individual users can set their own default directory for extract files.



General System Overview

Lesson: Job Submission

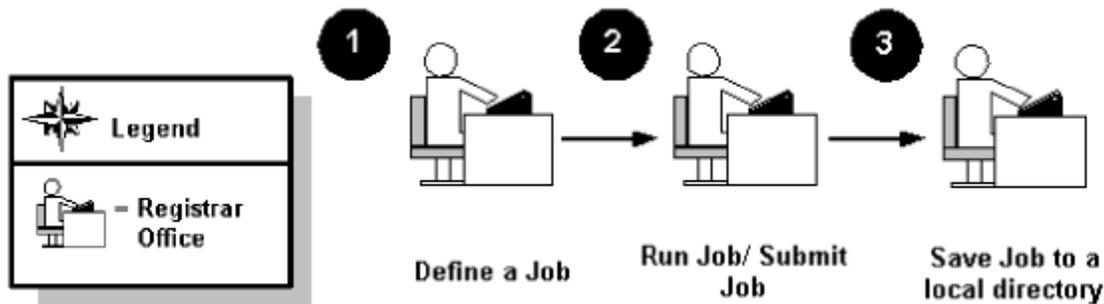
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Introduction

This lesson is intended to provide a brief overview of the Job Submission module, which facilitates the submission of reports and processes throughout all of the Banner systems.

Flow diagram

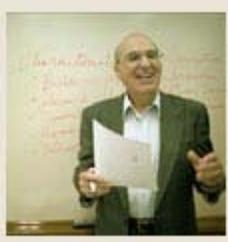
This diagram highlights the processes used to run Job Submission, from defining the job to saving it to the database.



About the process

The Job Submission module facilitates the submission of reports and processes throughout Banner. With the Job Submission module, you can

- submit a Banner report or process for processing
- define the characteristics of each Banner report or process that can be run at your institution
- define the parameters that control the processing of a report or process
- define user-level defaults for the parameters that control the processing of a report or process
- display output from a report or process that was run through Job Submission and saved to the database.



General System Overview

Lesson: Job Submission (Continued)

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Setup forms

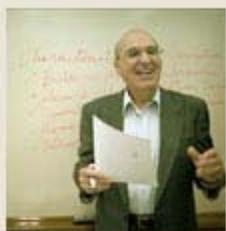
Before entering any job submission information into the system, there are several rule and validation forms that need to be reviewed, set or created.

The following examples are the rule and validation forms that play important roles in controlling Job Submission. Some of the forms below require an initial set-up that may require assistance from a technical standpoint. The pages following will review the forms and provide information regarding the required set-up.

The institution's system administrator will need to enter values for these forms:

- Printer Validation Form (GTVPRNT)
- General User Preference Maintenance Form (GUAUPRF).

Form Description	Purpose
Printer Validation Form (GTVPRNT)	Defines the codes that identify the printers at your institution.
System Indicator Validation (GTVSYSI)	Displays codes that identify the various Banner systems used at your institution.
Parameter Value Validation Form (GJAPVAL)	Defines valid values for the parameters that control the processing of a report or process.
Process Maintenance Form (GJAJOBS)	Defines the characteristics of each Banner report and process that can be run at your institution.
Parameter Definition Form (GJAPDEF)	Identifies the parameters that control the processing of a report or process. Establishes validation characteristics for the parameters. Defines system-level defaults for the parameters.
General User Preference Maintenance Form (GUAUPRF)	Allows you to establish personal preferences for the logged-in user ID.



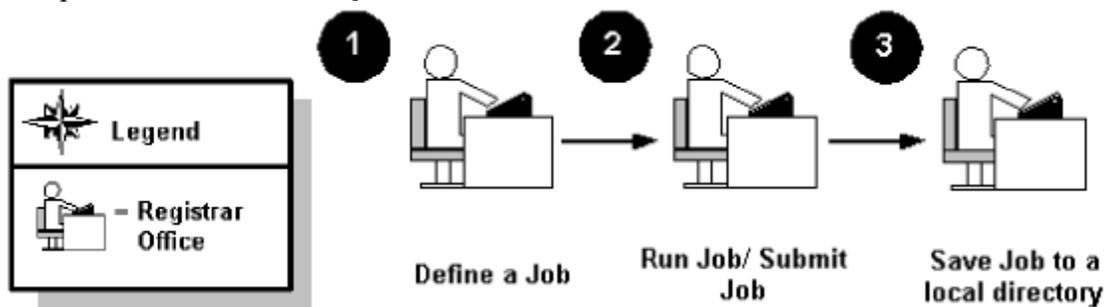
General System Overview

Lesson: Job Submission (Continued)

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Day-to-day process

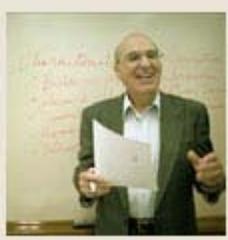
This diagram highlights the processes used to define a job, run Job Submission, and view, save and print to a local directory.



What happens

The stages of the process are described in this table.

Stage	Description
Registrar	
1	Locate/Define a job
2	Run job / Submit job
3	View, Print or Save job to a local directory



General System Overview

Lesson: Job Submission (Continued)

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Day-to-day forms

Form Description	Purpose
Process Submission Control Form (GJAPCTL)	Used to allow the submission of a Banner report or job for processing.
Process Maintenance Form (GJAJOBS)	Used to create and store the characteristics of each Banner job and report that can be run at your institution.
Saved Output Review Process (GJIREVO)	Provides online access for viewing, saving, and printing.
Printer Validation Form (GTVPRNT)	Contains information about the default printer that is used with GJIREVO.
Job Submission Profile Maintenance Form (GJAJPRF)	Contains user-level parameters that are used with GJIREVO.
Default Parameter Value Validation Form (GJAPDFT)	Creates a single set of user-level defaults, or copies user-level defaults from one user ID to another. You can also use this form to change default values in an existing job parameter set.
Parameter Definition Form (GJAPDEF)	Defines system-level defaults.
Default Parameter Value Validation Form (GJAPDFT)	Used to define user-level defaults for the parameters that control the processing of a job or report.

Additional workbooks

For additional information and training exercises on this topic, see the workbook titled “Banner General Job Submission.”



Release Date

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This workbook was last updated on 6/9/2006.