

Welcome to the
2nd All Hands Meeting

June 21st, 2007



Agenda

- Potluck Ann Lander
- Special Awards Indra/Chris
- Banner Bingo Michelle/Shiva
- Project Update/Awards Indra
- Successful Teams Dr. Pogue
- Admissions Design Admissions Team
- Reporting Strategy & Roadmap Indra
- Interfaces Team Update Dan Nichols
- Reg Team Update Beth Lacy
- Law School study abroad Chris Rapp
- Questions & wrap up



Special Awards

- Ben Arian - Print Shop
- Kim Mackie - Dining Services
- Rochelle Castro - Campus Scheduling
- Lanee Noyes - HR
- Liza Peterson-Gary - IT Budget & Operations



Banner Brown Bag Awards

- Chris Rapp
- Beth Lacy
- Matt Brennan
- Dan Nichols



Banner Bingo Rules

- Refresh your mind with all that Banner Training.
- Listen or read each question carefully.
- Cross off each answer on your card.
- If all answers on the 1st or last row are crossed off make sure you yell BINGO at the top of your lungs !!
Come up and have your card verified and get your prize.
- If **ALL** rows are scratched off on your card, make sure you yell BINGO even louder!!
You are the Winner!!



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 1:

A form used to create choices in Rule, Application, and/or Query forms is called?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 2:

What would the term code value be for Fall 2008?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 3:

The field that contains a code used to distinguish between Undergraduate, Graduate, Paralegal, Doctoral and Law careers for a student is called?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 4:

What is a section of a form containing related pieces of information - usually a single database table?

BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 5:

A screen used to query, enter, and/or update information is?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 6:

What is a character that is substituted for unknown character(s) in a Banner query?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 7:

Use a _____ to automatically access forms that are linked in a chain.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 8:

The forms and jobs that relate to Financial Aid processing start with what letter?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 9:

The pictures on the tool bar of the Banner forms used for navigation, are called?

BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 10: |

Banner uses the color _____ to denote disabled items such as menu items and fields.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 11:

What is the name of the Banner
Brown Baggers Group?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 12:

The first block in the Form is called the _____ block?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 13:

A _____ shows the valid values, or codes, that can be entered in a field. These valid values are stored in Banner validation forms and tables.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 14:

What is a column or set of columns in one table that uniquely identifies each row in the table?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 15:

What key do you use to Enter a Query?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 16:

What do you do to get back to the Key Block to start over?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 17:

What form can you look up an address for a person?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 18:

How do you move from one section of the form to another?

BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 19:

A component of a database table that contains the actual data organized in columns is?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 20:

Entity identified to the SCT
Banner system, such as a vendor
doing business with the institution
is?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 21:

I can only update information on a form if the third character of the form is (what) ?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 22:

All Student forms start with what letter?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 23:

 indicates that the field has nothing in it. Different from zero, which is a value.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 24:

 is an internal key field stored in the Person Identification table (SPRIDEN), and may represent a student, vendor, employee, or other entity.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 25:

The database management software used by the Banner system to store, manage, and retrieve information.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 26:

If it relates to a money field in
Banner we assign a _____ code?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 27:

What two things do you need to get into banner?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 28:

Dialog box, alert box, or list of values that appear in a separate window.

BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 29:

What is the name of USD's
Portal?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 30:

Name of component within Banner that is common to all others such as Student and Financial Aid.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 31:

The self-service part of Banner is called?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 32:

Are we using Banner for our HR system?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 33:

Banner forms, reports and job names are _____ characters long.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 34:

Which character identifies the type of form, report, job or table.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 36:

When you need help what documents can you refer to?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 37:

What is the most popular table in Banner? Hint – Person Id information.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 38:

Which Banner Team will be going Live in September?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 39:

Which Banner Team will be going Live in September?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 40:

What is the team acronym for the Xtender/Imaging team. The answer was in the Bliss Blog.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 41:

Where do you start you when you log onto Banner?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 42:

The name of the USD Banner Project is?



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 43:

How many validation tables does the Reg team have in Total. Hint – they have completed 70 of these.



BLISS Bingo

11:30 AM – 11:45 AM, June 21, 2007

Question 44:

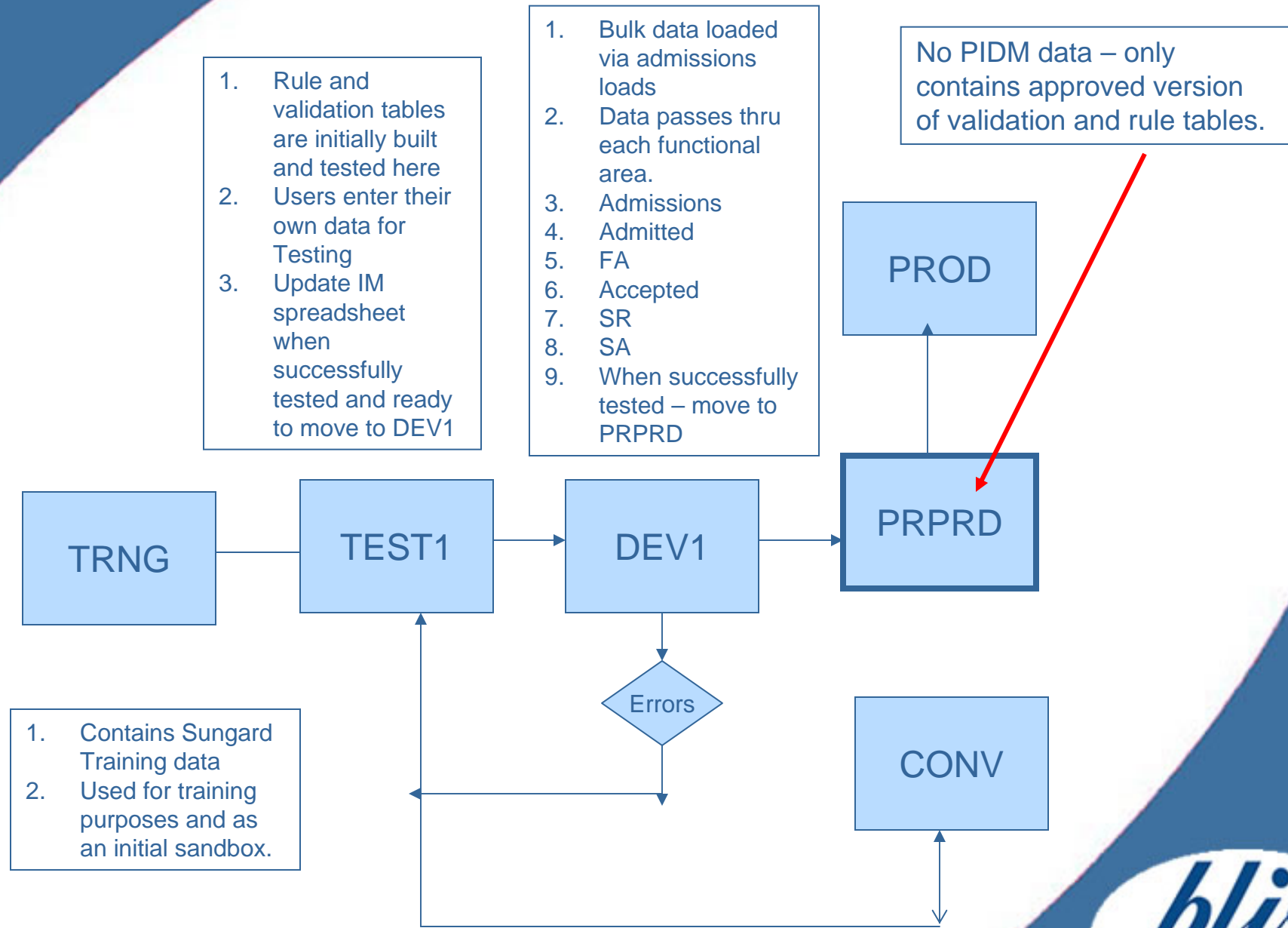
What is the name of the Banner instance that will be used for Integration Testing



Project Update

- Updates in Bliss Blog
- International Team
 - First meeting
 - Processes
 - Training
- AXIS team – Xtender install starts next week
 - June 25th.
- Instance Management
 - DEV 1 instance is ready
 - CONV prepared
 - Patches in Test





All new instances will be created from PRPRD
 All tables will only be changed in TEST1



Project Update

- Financial Aid
 - Conversion Preparation complete
- Tech Team
 - Patches
- Test Team
 - Admissions Script
- BLIT Team
 - Change in schedule
- CIMS Team
 - handling issues in Banner
 - New tab in MySandiego



New Bliss Tab in Mysandiego

The screenshot displays the MySanDiego website interface. At the top left, the "MySanDiego" logo is visible. A navigation bar contains several tabs: "New Student", "Welcome", "Library", "My Stuff", "Tutorial", "BLISS" (highlighted in blue), "Admissions", and "New Channels". Below the navigation bar, the main content area is titled "Banner-Luminis Change and Issue Management System". The left sidebar contains a "Documents" section with "Shared Documents", a "Lists" section with "Calendar", "Tasks", and "Issues - Banner Operational Data Store", a "Discussions" section with "Team Discussion", and a "Sites" section with "HelpDesk", "Project Tracking Workspace", "Bugs Database", and "Bliss-Blogs". The main content area features an "Announcements" section with a recent announcement titled "Get Started with the CIMS Team site" dated 6/11/2007 11:53 AM, and a "Calendar" section with entries for 6/27/2007, 7/4/2007, 7/11/2007, and 7/18/2007, all titled "Banner Brown Bag". The right sidebar contains a "Links" section with "MySandiego Portal", "University of Sandiego website", and "Add new link". The top right corner shows the date "June 21, 2007" and a user greeting "Welcome RECRUITWEB\ibishop". The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock displaying "2:30 AM".



Project Update

- DMC Team
 - Conversion Preparation complete
- SAT Team
 - Scripts for loading BANSECR/GSASECR security
- Training Team
 - *July 10-12 – ST Managing International students and visitors*
 - *July 17-19 - ST Banner Tech - Web Tailor*
 - *July 24-26 – ST Registration/ Fee **assessment***
 - CBTs
 - Other
- Data Standards Team
 - Met this week to review course numbering



Other Updates

- Conference call with NMSU regarding e-print and e-visions
- App-Worx
- Bliss Website
 - Glossary
 - Calendar
- MySandiego
 - Banner Brown Baggers Info
- Talked to several schools
 - Georgia Tech Notre Dame
 - NMSU Loyola Marymount
 - Bridgewater



Looking ahead - July

- ODS Kick off and install July 16 -25
- Reporting Tools Evaluation
- Testing area setup
- Appworx install
- Evisions Install



Off to the Races Next All Hands Meeting – August 10th



Team Member Awards



Team Award



Tradition dictates that a single trophy cup be passed from one winning team to the next.



Dr. Pogue – Successful teams

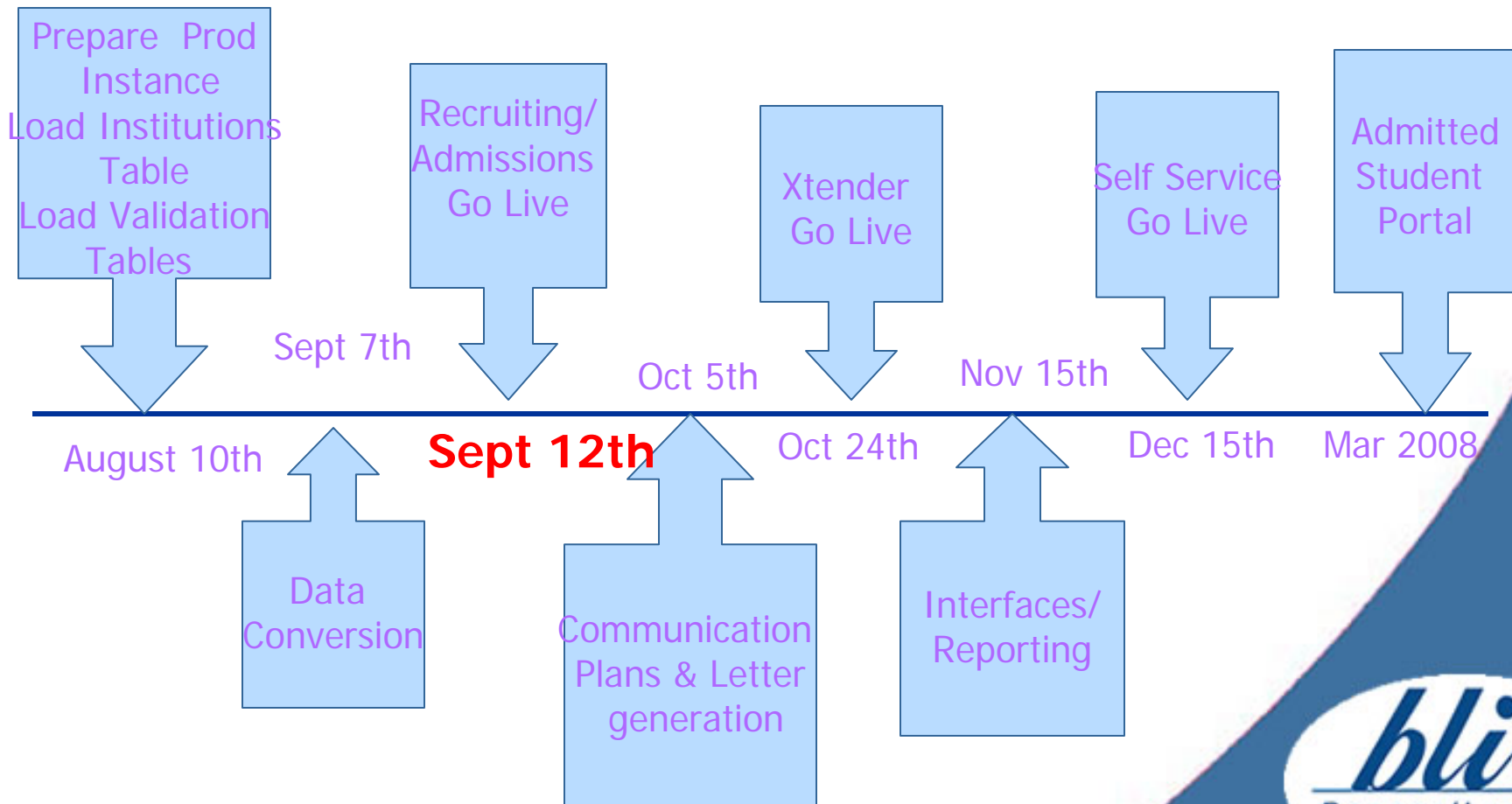


Admissions Banner Implementation

Steve Pultz/Steffanie Hoie
Danny Crinion / Ray McCormack



Admissions Timeline



Handling Grad and Undergrad

- Implementation will occur in parallel
- While different, both are similar from a system and process perspective
- Banner allows us to provide for differences while standardizing & streamlining “like-functionality”

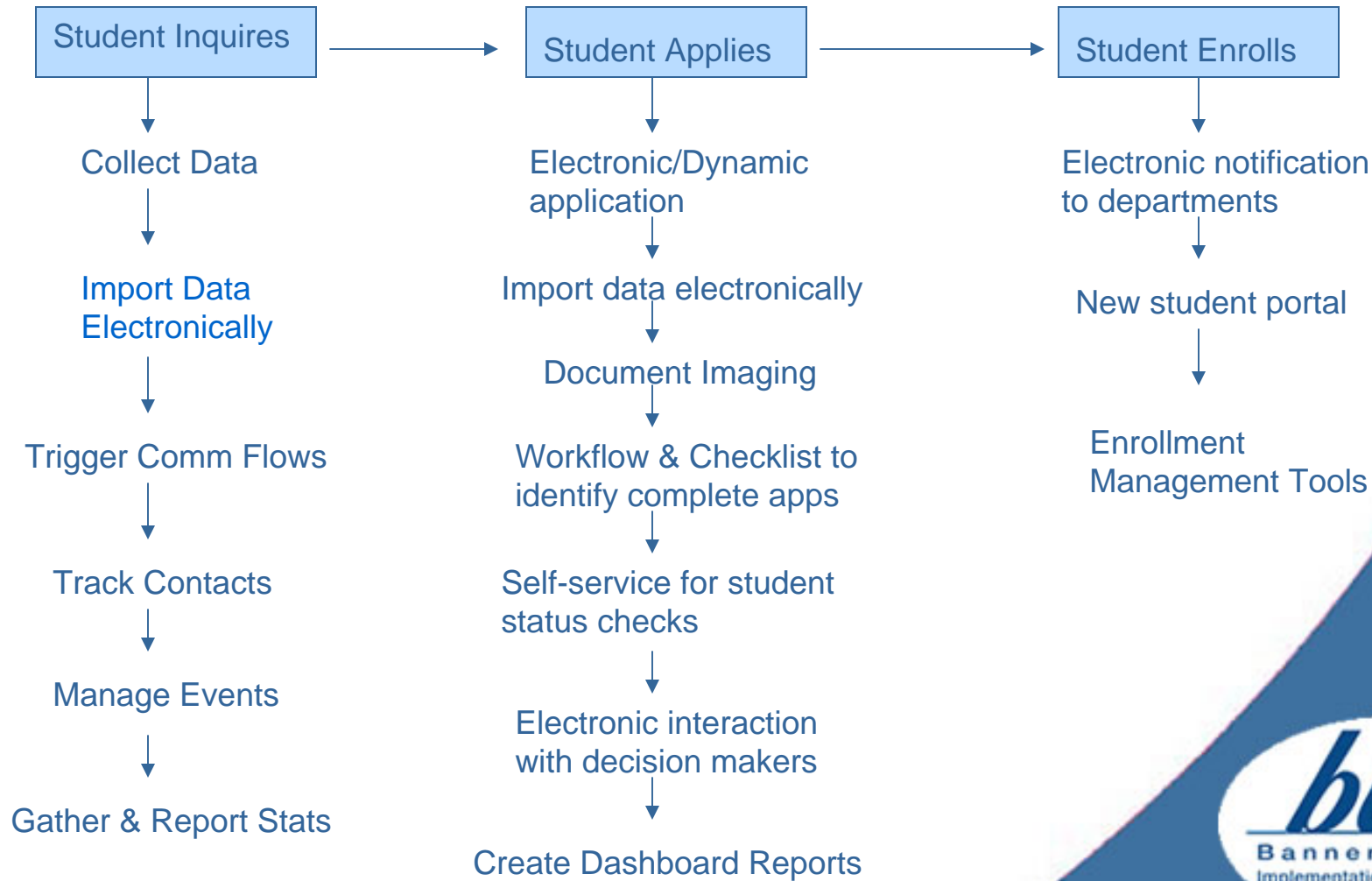


Basic Principles

- The need to automate & coordinate processes (as little “touch” as possible)
- From the student perspective, provide a highly personal, timely, and seamless set of services across the recruitment, admission, and enrollment cycles
- Enable the collection & distribution of data, reports, & analysis to interested parties across the campus



Banner Overview



Recruiting & Admissions in Banner

- 90% of data automatically loaded
- Manually enter data using Quickflows
- “Clean Address” will reduce returned mail
- “Common Matching” will reduce duplicates



Recruiting & Admissions

- Inquiry data
 - Test tapes (UG & GR)
 - External sources
 - Web site
- Import process loads data, checks duplicates, triggers comm flows
- Application data
 - UG & GR on line applications
 - Personal data & academic history



Inquiry Tape Loads

Danny Crinion / Ray McCormack

June 21st, 2007



Introduction

- Data such as test scores or recruiting information can be entered into Banner in two ways, either manually or via a tape load.
- The tape load process loads information from an outside media (e.g. ACT magnetic tapes) to Banner rather than having to type the information manually. Tape loads also create person records in Banner.



At USD we load the following Tapes

<u><i>Inquiry</i></u>	<u><i>Test Score</i></u>
<i>Peterson</i>	<i>SAT</i>
<i>Hobson</i>	<i>ACT</i>
<i>MCG</i>	<i>AP</i>
<i>NRCUG</i>	
<i>PCU</i>	



Tape Load Process

- Move the tape file onto the database server via FTP



Typical File Layout

ID	Name	Address	School	Address	
1	070701	CDebra	SAbramov	0210F 471600042092	Matthew F Maury High School 5210 Riverwood Road
2	070701	CAda	TAlvarez	0109 000000100590	9200 Sw 92nd Ct
3	070701	CAlexa	FAnderson	0209F 241870061791	Central High School 1019 Meadow St
4	070701	CMichael	AAAnderson	0109F 240077092990	Pact Charter School 11627 Quebec Ave N
5	070701	CWendy	Araujo	0209F 441189082791	Center High School 525 Fannin St
6	070701	CNida	Arif	0209F 000000112591	6220 Dana Ave
7	070701	CAnisha	Asher	0208F 050748072990	Diamond Bar High School 1850 S Diamond Bar Blvd
8	070701	CAndrea	EAtkin	0209F 181320012991	Oldham County Senior HS 5114 Macintosh Ave
9	070701	CShirin	SBaradaran	0209F 152347082191	Penn High School 15714 Fieldcrest Ct
10	070701	CSara	JBartlett	0208F 480920072490	North Kitsap High School 4745 Me Hendrickson Rd
11	070701	CTeresa	KBlumenstein	0209F 310473100890	Paul Vi High School 413 Strausbridge Ave
12	070701	CDebra	SAbramov	0210F 471600042092	Matthew F Maury High School 5210 Riverwood Road
13	070701	CAda	TAlvarez	0109 000000100590	9200 Sw 92nd Ct
14	070701	CAlexa	FAnderson	0209F 241870061791	Central High School 1019 Meadow St
15	070701	CMichael	AAAnderson	0109F 240077092990	Pact Charter School 11627 Quebec Ave N
16	070701	CWendy	Araujo	0209F 441189082791	Center High School 525 Fannin St
17	070701	CNida	Arif	0209F 000000112591	6220 Dana Ave
18	070701	CAnisha	Asher	0208F 050748072990	Diamond Bar High School 1850 S Diamond Bar Blvd
19	070701	CAndrea	EAtkin	0209F 181320012991	Oldham County Senior HS 5114 Macintosh Ave
20	070701	CShirin	SBaradaran	0209F 152347082191	Penn High School 15714 Fieldcrest Ct
21	070701	CSara	JBartlett	0208F 480920072490	North Kitsap High School 4745 Me Hendrickson Rd
22	070701	CTeresa	KBlumenstein	0209F 310473100890	Paul Vi High School 413 Strausbridge Ave
23	070701	Anthony	MBoss	0108 221010022790	Wachusett Regional High School 177 Winthrop Ln
24	070701	CLauren	EBryant	0209F 431401071291	First Assembly Christian Sch 1156 Morganshire Dr
25	070701	CWilliam	EBunce	0109F 101206051191	Community School Of Naples 446 Rudder Rd
26	070701	CAhson	AChoi	0208F 050092010390	Western High School 2859 W Lincoln Ave # 135
27	070701	CFerrie	PChu	0208F 052516021590	Diamond Ranch High School 23605 Golden Springs Dr
28	070701	CKaren	Clark	0208 000000121589	1022 Rangpur Ct
29	070701	Samantha	LCorrotan	0209 390428092591	Bristol Junior-Senior HS 1204 N Cedar St
30	070701	CKatharine	LCosner	0209F 051512012991	Pinewood School 1555 Clay Dr
31	070701	CLindsey	MCoyle	0209F 490205041191	Charleston Catholic HS 1556 Virginia St E
32	070701	CKylie	MCurtis	0208 000000031791	33677 Haywood Ct
33	070701	CCaitlin	MDean	0208 000000022790	167 Weston Rd
34	070701	CLeah	ADotner	0208 000000111589	2645 Augusta
35	070701	CMatthew	LErvin	0109F 440294022391	L C Anderson High School 12415 Deer Trak
36	070701	CIgnacio	REspinoza	0108 000000032790	36272 Enfield Dr
37	070701	CAlessandra	Ferrer	0209 000000081291	6015 Elk Vly
38	070701	CKatherine	AFlinn	0209F 441472050191	Judson Senior High School 12702 Northledge Dr
39	070701	Calba	IFlores	0208F 050704122089	South Hills High School 16729 Loukelton St
40	070701	CDiatra	JFlores	0109 000000020991	26 S Barkway Ln



Tape Load Process

- Move the tape file onto the database server via FTP
- Setup the Tape Field Position Rule form



The Tape Field Position Rule Form

Oracle Developer Forms Runtime - Web: Open > SRATPPD
File Edit Options Block Item Record Query Tools Help


Tape Field Position Rule: SRATPPD 7.2 (TEST1)

Tape Code: PCU Private College Guide Search Record Number: 01

Field Name	Start Position	End Position	Occurrence	Activity Date
NAME_FIRST	17	35	1	16-MAR-2007
NAME_MI	36	36	1	16-MAR-2007
NAME_LAST	37	55	1	16-MAR-2007
GENDER	56	57	1	07-MAR-2007
HSCH_GRAD_YEAR	58	59	1	15-MAR-2007
HSCH_SBG_CODE	62	67	1	15-MAR-2007
BIRTH_MON	68	69	1	07-MAR-2007
BIRTH_DAY	70	71	1	07-MAR-2007
BIRTH_YEAR	72	74	1	07-MAR-2007
STREET_LINE1	107	136	1	07-MAR-2007
STREET_LINE2	137	166	1	07-MAR-2007
CITY	167	189	1	07-MAR-2007
STAT_CODE	190	191	1	07-MAR-2007
ZIP	192	196	1	07-MAR-2007
PHONE_AREA	209	211	1	07-MAR-2007
PHONE_NUMBER	213	219	1	07-MAR-2007
ETHN_CODE	258	259	1	13-APR-2007
INTS_CODE1	264	265	1	09-MAR-2007
INTS_CODE2	266	267	1	09-MAR-2007
INTS_CODE3	268	269	1	09-APR-2007

Tape Field Name
Record: 1/7 | List of Valu... | <OSC>

Start Windows Expl... EditPlus - [Nonam... Oracle SQL Devel... 2 Internet Expl... Instance Building... Microsoft PowerPo... 9:58 AM



Tape Load Process

- Move the tape file onto the database server via FTP
- Setup the Tape Field Position Rule form
- Setup the Tape Code Conversion form



The Tape Code Conversion Form

Oracle Developer Forms Runtime - Web: Open > SOTCNVT

File Edit Options Block Item Record Query Tools Help

Tape Code Conversion SOTCNVT 7.3 (TEST1)

Interface Type: PCU PCU Validation Table Name: Copy Values:

Table Name	Tape Value	Conversion Code	Description
CITZ	B	P	Permanent Resident/Res. Alien
CITZ	C	N	Non-resident Alien
CITZ	D	U	Unknown
ETHN	00	7B	Other/No Response
ETHN	03	1	American Indian/Alaska Native
ETHN	04	2	Asian
ETHN	05	3	Black or African American
ETHN	06	5B	Hispanic, Mexican
ETHN	07	5C	Hispanic, Puerto Rican
ETHN	08	5A	Hispanic, South/Cent American
ETHN	09	6	White
ETHN	10	7B	Other/No Response
GNDR	01	Male	
GNDR	02	Female	
INTS	19	AA	Accounting
INTS	20	AM	Business Marketing
INTS	21	BS	Other Science Interest

Validation Table of Converted Code; last four characters - field NOT validated.
Record: 1/? <OSC>

Start 2 Winda... EdrPlus - [...] Oracle SQL... 2 Intern... Instance B... Microsoft P... Windows ... Duplicates... 10:28 AM

Tape Load Process

- Move the tape file onto the database server via FTP
- Setup the Tape Field Position Rule form
- Setup the Tape Code Conversion form
- Setup the Common Matching form for duplicate checking



The Common Matching Form

Oracle Developer Forms Runtime - Web: Open > GORCMRL

File Edit Options Block Item Record Query Tools Help

Common Matching Rules GORCMRL 7.3 (TEST1)

Matching Source: PCU PCU Tape Loading

Comment:

Rule Set

Priority: 1 Description: PCU Tape Loading User ID: RMCCORMACK Activity Date: 13-APR-2007

Rule Set Comment: email address not null, day of birth not null, year of birth not null, last name not null, first name not null

Create Comments from Matching Rules Insert Core Matching Elements

Matching Rules (6) Copy To (2) Matching Procedures (0)

Column	Element	Length	Match on Null Data	User ID	Activity Date
GOREMAL_EMAIL_ADDRESS	EMAIL	90	<input type="radio"/> Yes <input checked="" type="radio"/> No	RMCCORMACK	13-APR-2007
SPBPERS_BIRTH_DAY	DATE OF BIRTH DAY	2	<input type="radio"/> Yes <input checked="" type="radio"/> No	RMCCORMACK	13-APR-2007
SPBPERS_BIRTH_YEAR	DATE OF BIRTH YEAR	4	<input type="radio"/> Yes <input checked="" type="radio"/> No	RMCCORMACK	13-APR-2007
SPRADDR_STREET_LINE1	STREET LINE 1	30	<input type="radio"/> Yes <input checked="" type="radio"/> No	RMCCORMACK	13-APR-2007
SPRIDEN_SEARCH_FIRST_NAME	FIRST NAME	15	<input type="radio"/> Yes <input checked="" type="radio"/> No	RMCCORMACK	13-APR-2007
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	60	<input type="radio"/> Yes <input checked="" type="radio"/> No	RMCCORMACK	13-APR-2007
			<input type="radio"/> Yes <input type="radio"/> No		
			<input type="radio"/> Yes <input type="radio"/> No		

Priority Number to assign to the rule set for this Common Matching Source.

Record: 1/1 <OSC>

Start 2 Winda... EdrPlus - [...] Oracle SQL... 2 Intern... Instance B... Microsoft P... Windows ... Tape Load... 10:26 AM

Tape Load Process

- Move the tape file onto the database server via FTP
- Setup the Tape Field Position Rule form
- Setup the Tape Code Conversion form
- Setup the Common Matching form for duplicate checking
- Run the Electric Prospect Load process to transfer the tape file into temporary tables



The Electric Prospect Load Process

The screenshot displays the Oracle Developer Forms Runtime interface for the 'Electronic Prospect Load' process. The window title is 'Oracle Developer Forms Runtime - Web: Open > GJAPCTL'. The main area is titled 'Process Submission Controls GJAPCTL 7.3 (TEST1)'. It features a 'Process' dropdown set to 'SRTLOAD' and a 'Parameter Set' dropdown set to 'PCU'. Below this is a 'Printer Control' section with a 'Printer' dropdown set to 'DATABASE', a 'Special Print' field, 'Lines' set to '55', and a 'Submit Time' field. The 'Parameter Values' section contains a table with 8 rows of parameters and their values. Below the table, there is a note: 'LENGTH: 30 TYPE: Character O/R: Required M/S: Single Data file name, can include the directory: /tmp/search.dat.'. The 'Submission' section includes a 'Save Parameter Set as' checkbox, 'Name' and 'Description' fields, and 'Hold' and 'Submit' radio buttons. At the bottom, there is a 'Special Print Instructions' field and a 'Record: 1/1' indicator. The Windows taskbar at the bottom shows various open applications and the system clock at 10:25 AM.

Number	Parameters	Values
01	Data File Name	/u11/temp_files/pcu.dat
02	Electronic Prospect Code	PCU
03	Tape ID	1
04	AMCAS School Number	
05	SSN or Generated ID	S
06	Term Code	
07	Level Code	UG
08	Campus Code	

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
Data file name, can include the directory: /tmp/search.dat.

Tape Load Process

- Move the tape file onto the database server via FTP
- Setup the Tape Field Position Rule form
- Setup the Tape Code Conversion form
- Setup the Common Matching form for duplicate checking
- Run the Electric Prospect Load process to transfer the tape file into temporary tables
- Run the Electric Prospect Match process to either create or update Banner recruiting or admissions records in the database



The Electric Prospect Match Process

The screenshot displays the Oracle Developer Forms Runtime interface for the 'Electronic Prospect Match' process. The window title is 'Oracle Developer Forms Runtime - Web: Open > GJAPCTL'. The menu bar includes 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. The toolbar contains various navigation and action icons.

Process Submission Controls GJAPCTL 7.3 (TEST1)

Process: SRRSRIN | **Electronic Prospect Match** | **Parameter Set:** PCU

Printer Control

Printer: [] | **Special Print:** [] | **Lines:** [] | **Submit Time:** []

Parameter Values

Number	Parameters	Values
01	Electronic Prospect Code	PCU
02	Tape ID	
03	Report Type (if Parm 04 = N)	A
04	Auto Load (Skip Dup Chk)	Y

LENGTH: 10 TYPE: Character O/R: Required M/S: Single
Enter Electronic Prospect Code

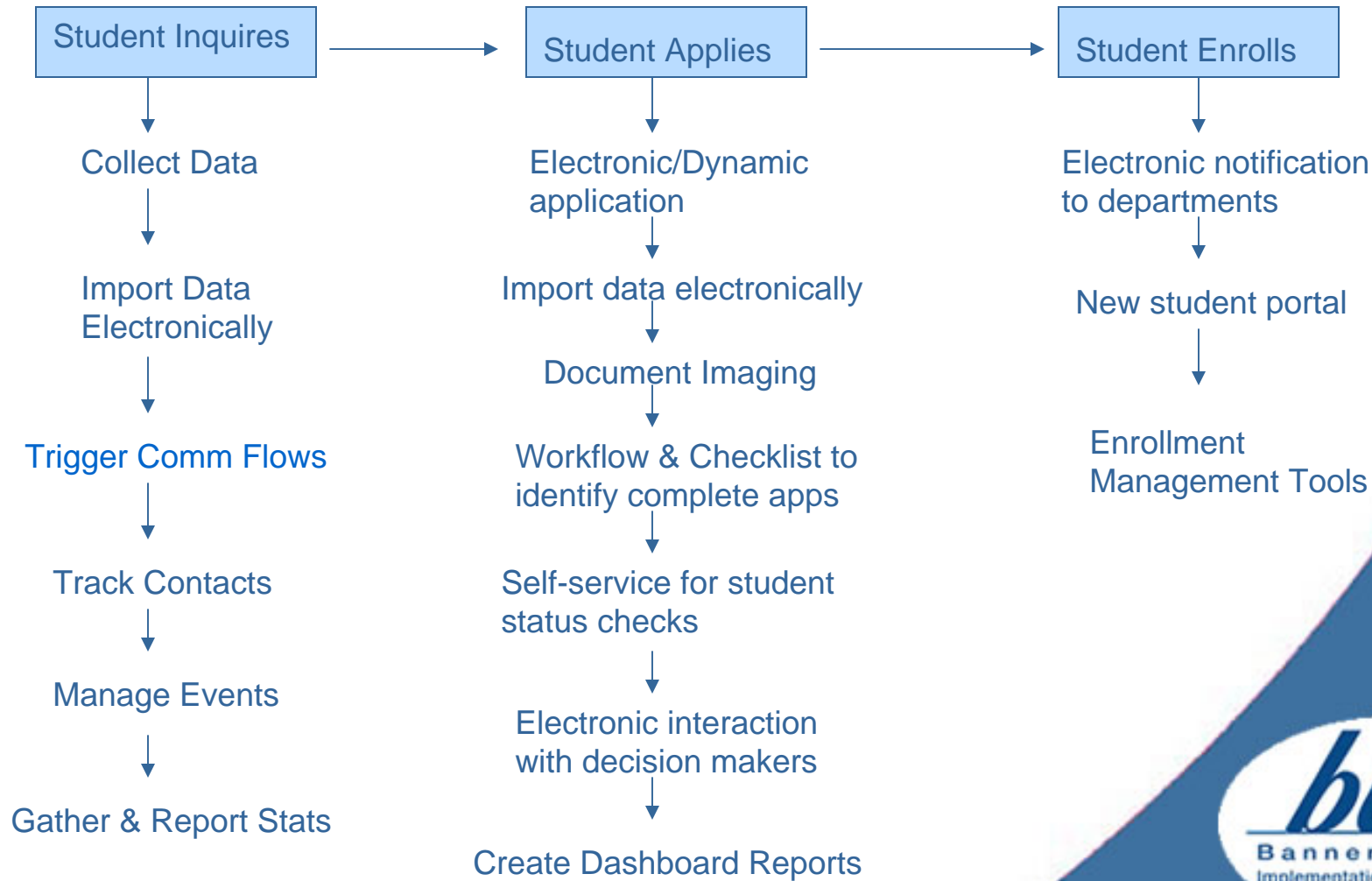
Submission

Save Parameter Set as | **Name:** [] | **Description:** [] | Hold | Submit

Destination Printer, DOUBLE-CLICK for available printers, NOPRINT for no printout, DATABASE to review on-line.
Record: 1/1 | ... | List of Valu... | <OSC>

Windows taskbar: Start, 3 Windows E..., EditPlus - [No..., Oracle SQL De..., 2 Internet --, Instance Build..., Microsoft Pow..., Windows Med..., 9:59 AM

Banner Overview



Communication Flows

- Through rules, banner allows for automated communication
- “Triggers” include student type, academic program, and citizenship (among others)
- Communication plans can allow us to “bundle” communications to a student based on our rules and time their fulfillment

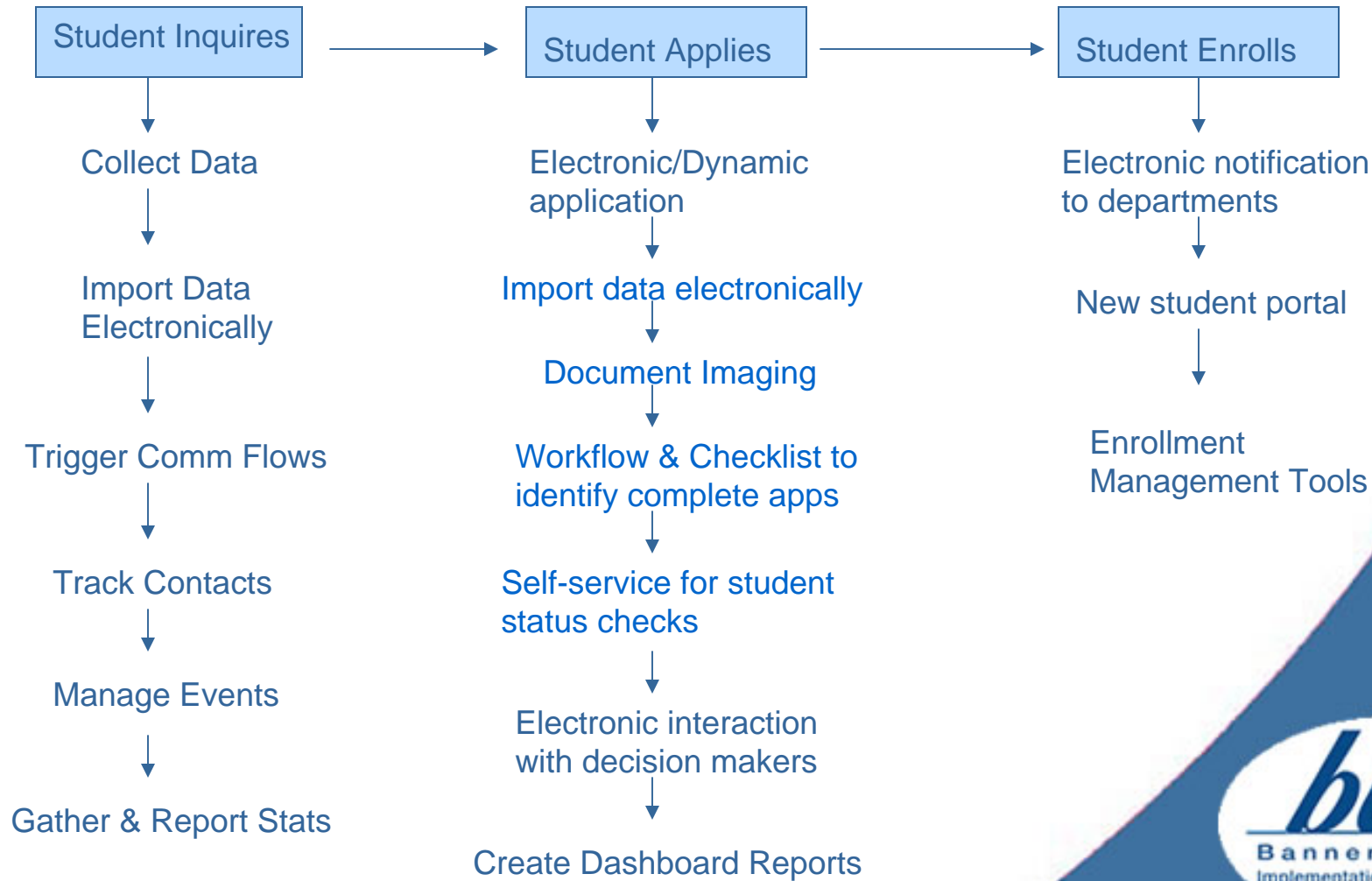


Letter Generation

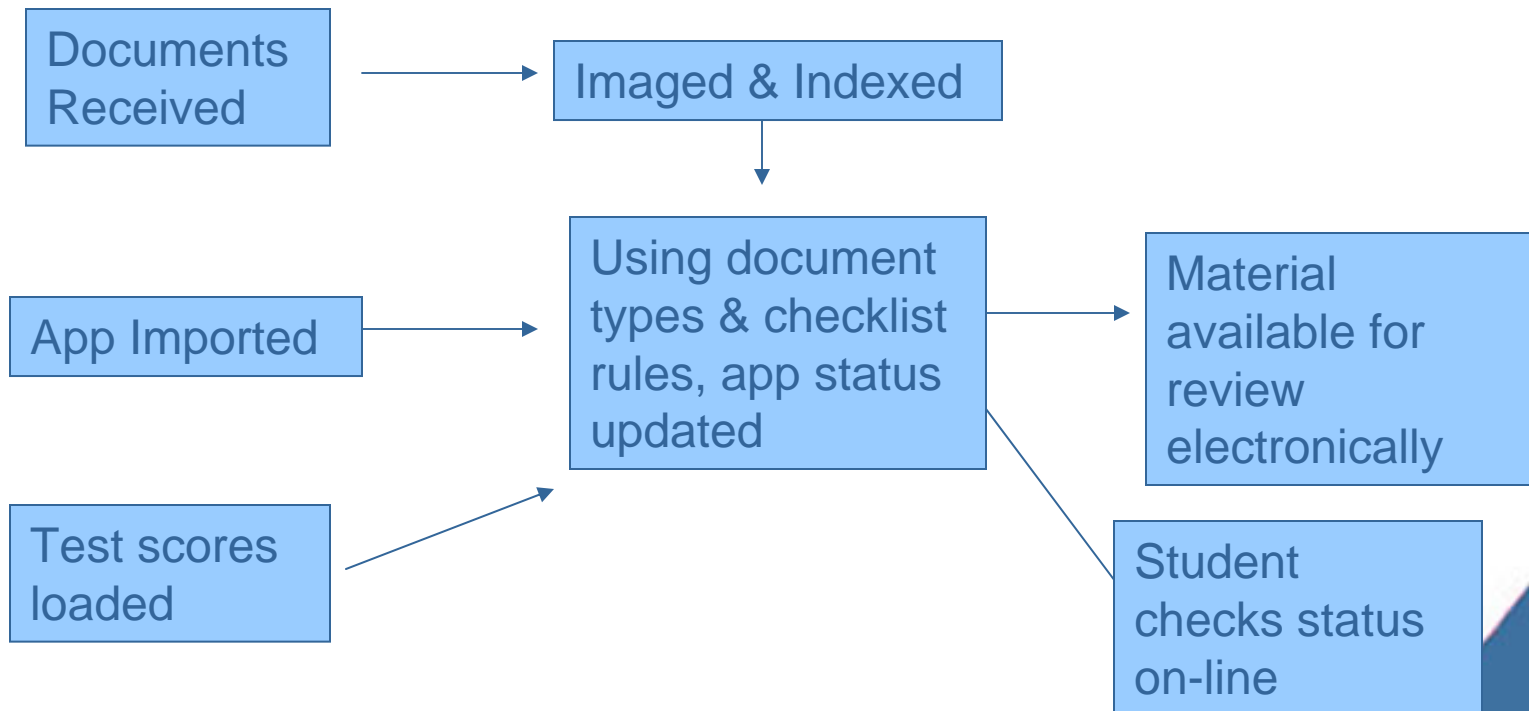
- Pending letters on SUAMAIL
 - Communication Plan
 - Manually entered
- Use Job Submission to run a particular letter
- Produces output file with appropriate mail merge fields for that letter
- Merge output file with appropriate letter
- Updates SUAMAIL that letter is sent



Banner Overview



App Processing with Banner & Xtender



Document Imaging

- Banner & Xtender will work in unison to process and manage all application documents for UG & GR
- Documents will be imaged upon receipt
- No more photocopying of material or inter-office mailing of applications



Self Service & Reports

- Self Service
 - Allow students to check status on-line
 - Reduces phone calls
- ODS/Reports
 - Several standard reports
 - Views for ad-hoc queries



Admissions Applications Loads

Danny Crinion / Ray McCormack

June 21st, 2007



Application Load Process (End User)

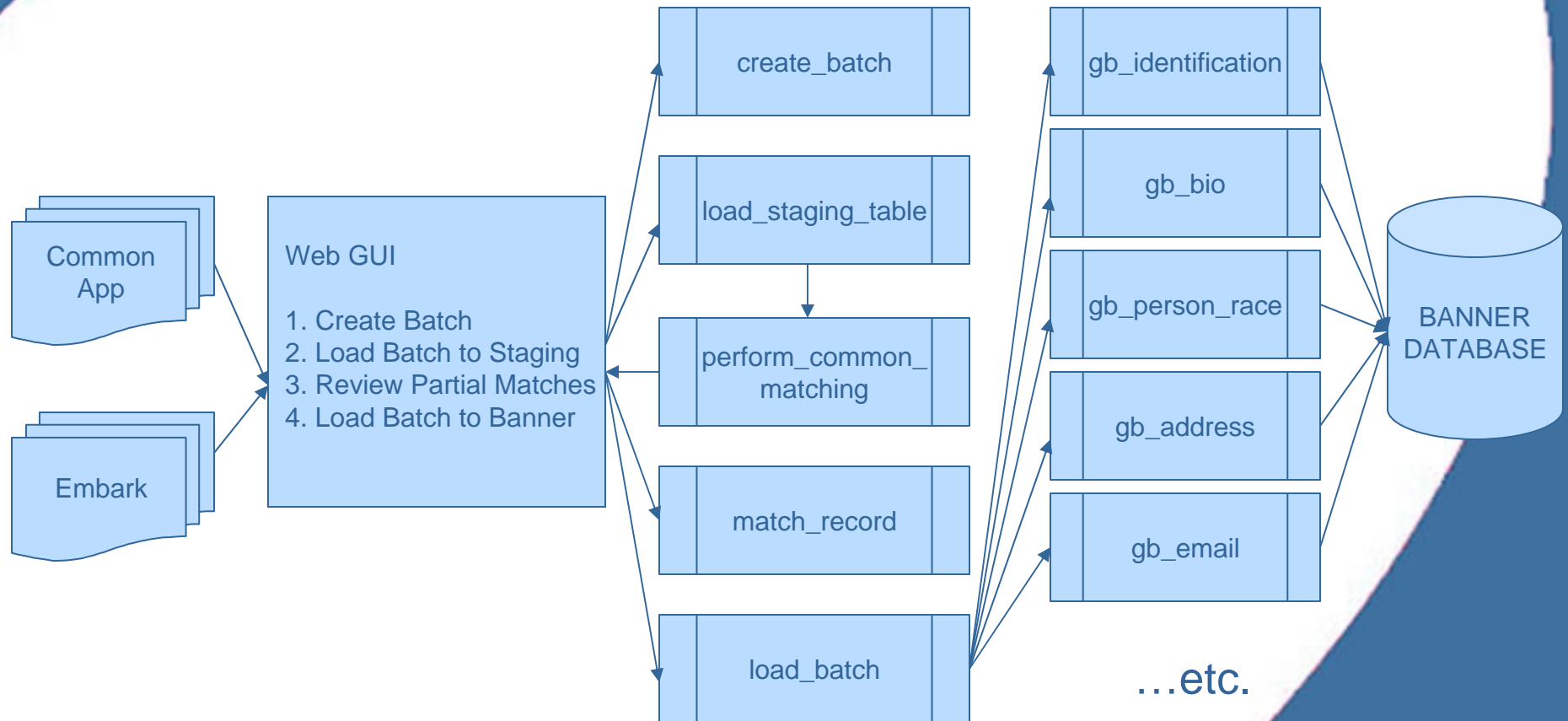
1. Create Batch
2. Load Batch to Staging Table
3. Review Partial Matches
4. Load Batch to Banner



MySanDiego (admissions staff group)

Admissions API (USD_ADM_Electronic_Apps)

Banner Seeded APIs



1. Create Batch

New Batch

Batch ID:	<input type="text" value="1001"/>
Description:	<input type="text" value="June 4th to June 18th 2007"/>
Source Type ID:	<input type="text" value="Common Application"/>

[Insert](#)

[Back to main menu](#)



2. Load Staging Table

Load Batch to Staging Table

Source Type:

Batch:

Applications File:

[Back to main menu](#)



3. Review Partial Matches

Review Partial Matches

Batch:

Applications with Partial Matches

	Staging ID	Last Name	First Name	MI	SSN	DOB	Street	#	City	State	Zip	#Matches
Select	10017	Gable	Clark	Rhett	00020000	11/10/1989 12:00:00 AM	120 Palm St		Beverly Hills	CA	90212	19
Select	9994	Test	Maria			4/1/1990 12:00:00 AM	123 Normal St		Newburg	ND	58762	3
Select	9996	Gable	Clark	Rhett	00020000	11/10/1989 12:00:00 AM	120 Palm St		Beverly Hills	CA	90212	19
Select	10015	Test	Maria			4/1/1990 12:00:00 AM	123 Normal St		Newburg	ND	58762	3

Possible Matches for Selected Application

	PIDM	MESSAGE	Last Name	First Name	MI	SSN	DOB
Select	70073	Name Match, SSN/SIN/TIN Missing, Birth Day Match, Birth Month Match, Birth Year Match, E-mail Match	Test	Maria			4/1/1990
Select	70075	Name Match, SSN/SIN/TIN Missing, Birth Day Match, Birth Month Match, Birth Year Match, E-mail Match	Test	Maria			4/1/1990
Select	70074	Name Match, SSN/SIN/TIN Missing, Birth Day Match, Birth Month Match, Birth Year Match, E-mail Match	Test	Maria			4/1/1990

Finished

[Back to main menu](#)

4. Load Batch to Banner

Load Batch to Banner

Batch ID:

[Back to main menu](#)

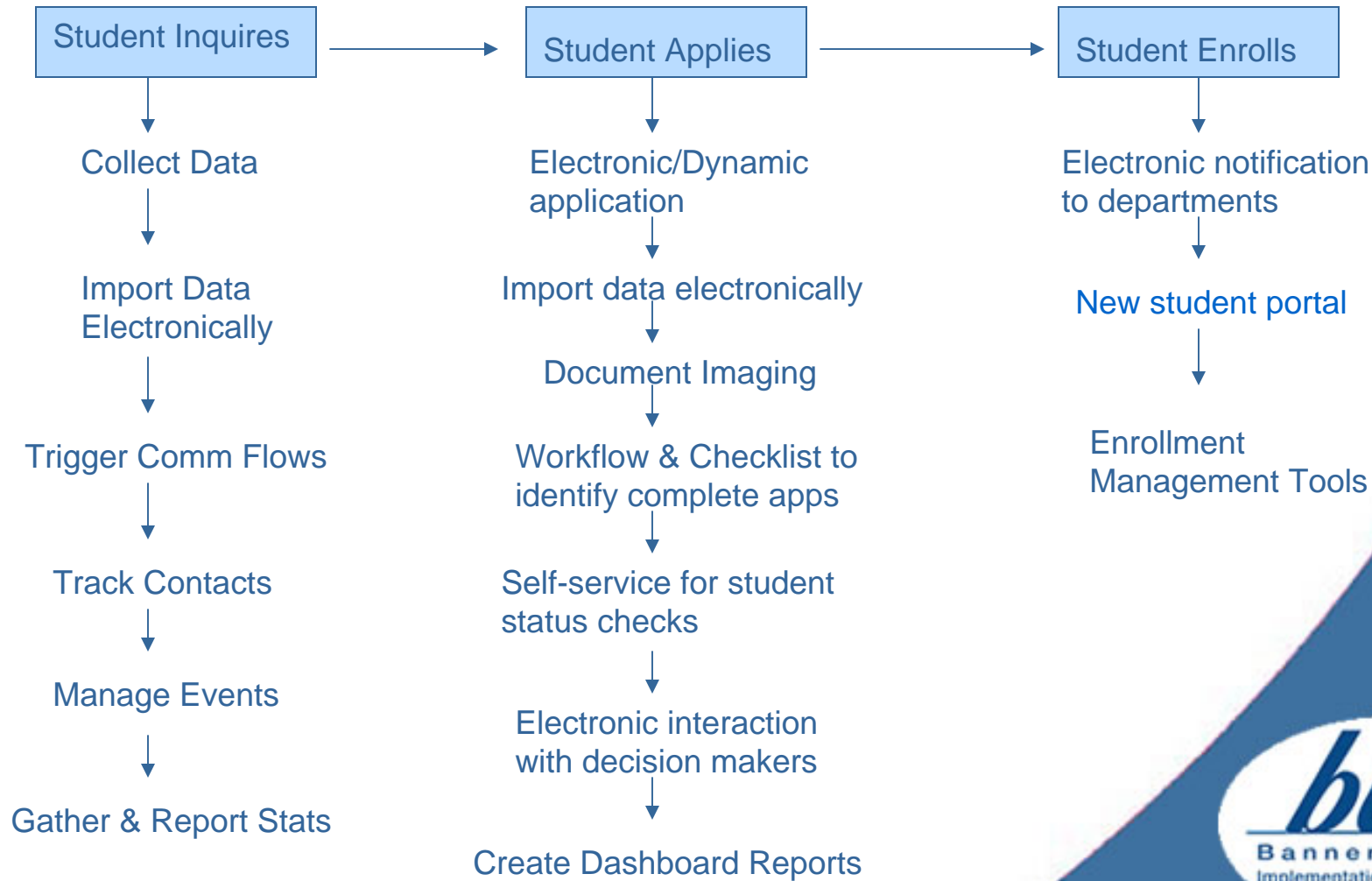


Advantages of this design

- ✓ No need for third party products – e.g. Nolib - save \$\$\$\$, also no need to learn their scripting languages – everything is in pl-sql
- ✓ No FTP of application text file needed
- ✓ Keeps a history of Batches loaded
- ✓ No coding directly against banner objects – only calls to seeded Banner APIs
- ✓ Admissions API handles all business rules logic
- ✓ No code on the presentation layer – only calls to the adm API
- ✓ Presentation Layer does not need access to the banner objects/APIs – only to the admissions API
- ✓ End user only needs access to the admissions group in MySanDiego



Banner Overview



New Student Portal

My Account Content/Layout | **Welcome Steffanie** | You are currently logged in.

mirapoint find people groups

New Student | Welcome | One Stop Services | Student Life | Academic Resources | Employee | Library | My Stuff | Tutorial | BLISS | Admission

Checklist

- [New Student Pre-Arrival Checklist \(freshman\) - Coming Soon!](#)
- [New Student Pre-Arrival Checklist \(transfers\)](#)

My Housing

• We are delighted to welcome you to our residence halls at the University of San Diego! You will be sent information about how to sign up for housing and meal plans using this portal. The following links can help you get started.

- [When and how can I sign up?](#)
- [Freshman Living Options](#)
- [Transfer Living Options](#)

My Registration

- Registration material will be sent by early June and will include an academic questionnaire and a course catalog. Based on your interests, high school preparation, and test scores, a schedule of classes will be prepared for you. Once that is done, you will be able to view your schedule from this portal.
- [Undergraduate bulletin](#)
- [Freshman Preceptorial](#)
- [View schedule of classes - Coming Soon!](#)
- [Rights to privacy \(FERPA\)](#)
- [Math Placement Exam - Coming Soon!](#)

Countdown to Move-In Day

72 Days, 22 Hours, 54 Minutes, 19 Seconds.

Important Dates and Inform

What's up @USD...

June 15, 2007

Torero Days mailing with informal the schedule, options for students commuting from home, buying books helpful information.

Week of September 1-4
September 1-2, 2007 -- Parent Orientation
September 1-4, 2007 -- Torero Days
important information for new students
opportunities for them to get to know
September 5, 2007 -- Classes begin
More Information is available at
<http://www.sandiego.edu/orientation>

More dates coming

My Parent Relations

- The Office of Parent Relations provides information and is a resource for...

Student Zone

This is the section of the web site that allows you, the new student, to ask questions and interact with current USD students. The students

Slideshow

Implementation Student System

USD Reporting Strategy and Roadmap

Empowering The Campus
Community



Think Big – Start Small

- Analyze Current Reports
- Redefine Reporting
- Build Information Access Infrastructure
- Evaluate Reporting Tools
- Provide “Managed” reports as needed
- Train and Empower Users who can create their own reports
- Support the environment
- Start planning Data Warehouse for Analytical and Business Intelligence use
- Train, Train , Train

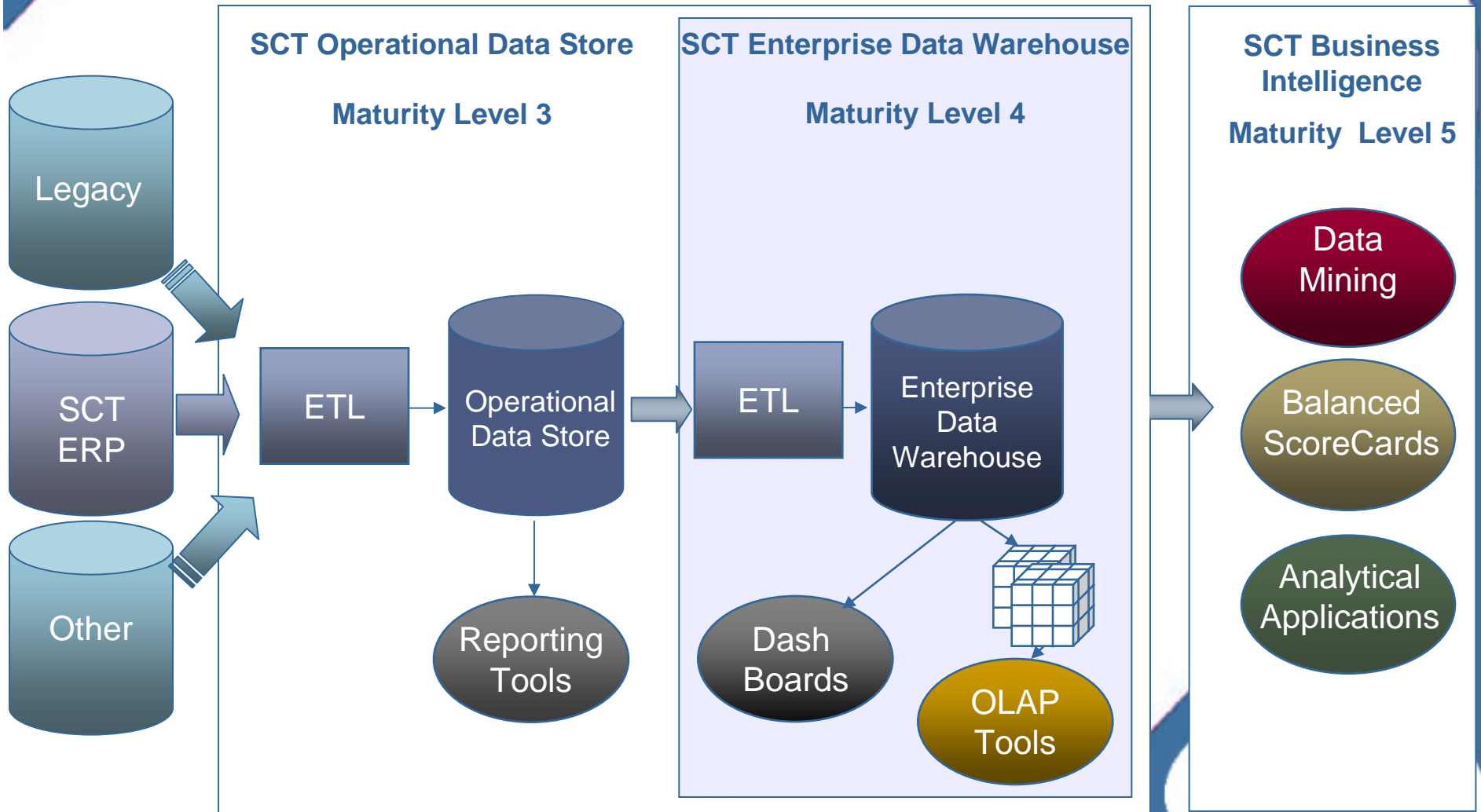


Analyze current reports

- Identify reports which have high priority and criticality
- Will help identify redundant or out-dated reports which are no longer need in the new environment.
- Will provide AIS project management and planning to allocate the right resources to meet the reporting needs of all departments
- Added a column to the current inventory list to review further



Build Information Access Infrastructure



What comes with ODS

- 133 report templates per reporting tool
- Expanding reporting tool choices
 - Access, Brio Query, Cognos, Discoverer, Web Focus
 - Plans to include Crystal and Business Objects
 - Discoverer End-User Layer
- Creating an external Website for clients who wish to get to the Information Access and Report library online
 - Clients will be able to download and post submissions to the web site



Evaluate Reporting Tools

- Hyperion (formerly Brio)
- Cognos
- Discoverer
- SQR
- Oracle Reports
- Web Focus
- Argos



Some evaluation criteria

- What does the tool and its reports look like?
- What are the tool's strengths?
- What is required to use the tool?
- Who uses the tool and how is it deployed?
- User reception to the tool.
- Does the tool support web or electronically delivered reports?
- Is the tool web enabled?
- What is the training curve?
- What is the cost of the tool?
- What are the hardware requirements?
- What are the system administrative requirements?
- Does the current AIS tools already have the tool's features? (
- How difficult is it to update reports with this tool?



Provide “Managed” reports as needed

- Standard Banner reports will be available from the day each module goes live.
- As part of the initial analysis, the BODS team will identify which Banner reports, if any will be needed.
- Any custom reports identified as critical and needed for Go Live will be available – make sure this is added in the Testing scripts.
- Remember: Until transactions are processed in Banner, there will be minimal data in the operational reports.

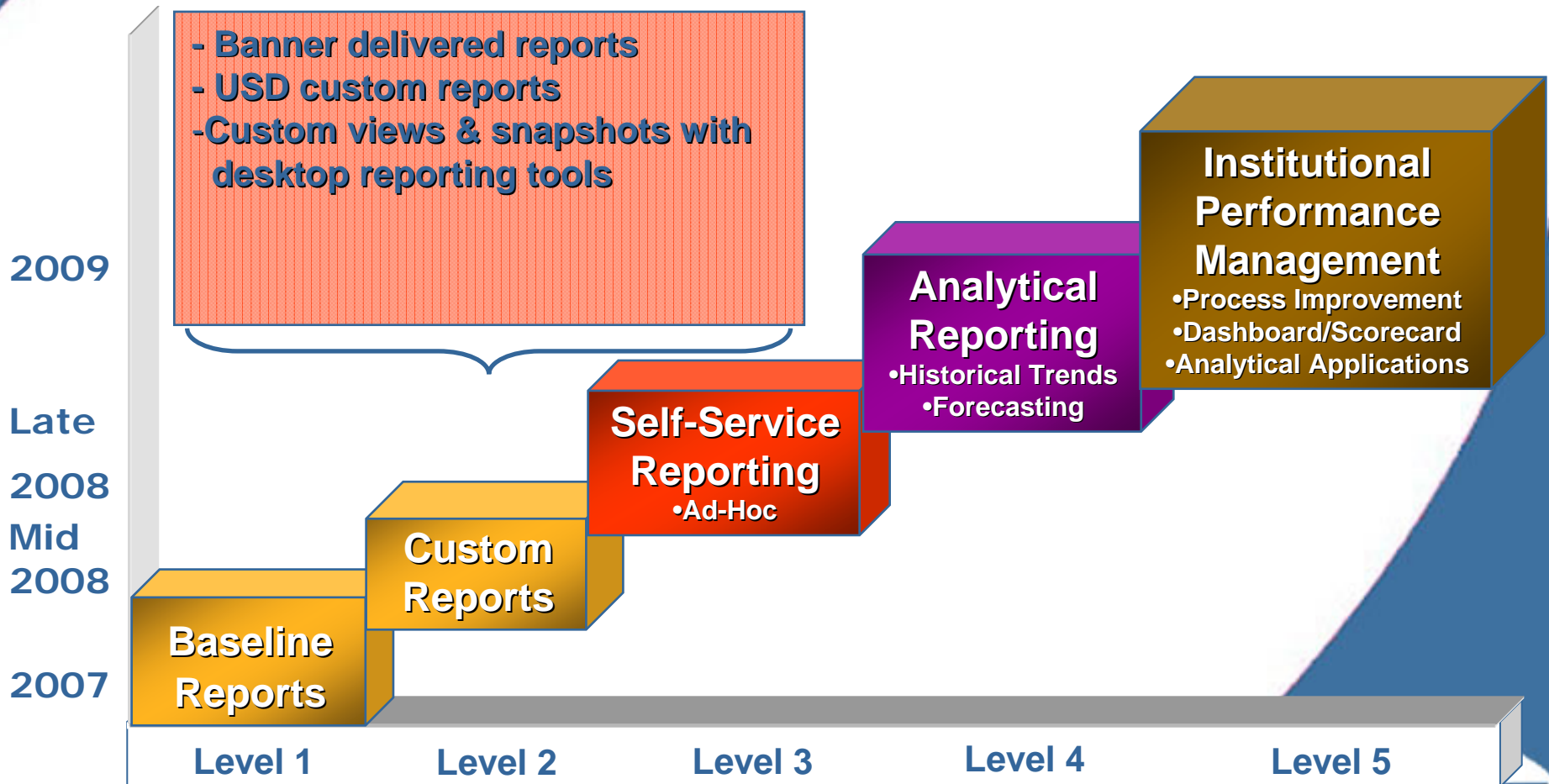


Train and Empower Users who can create their own reports

- Reporting Tools Training
- Data Dictionary
- Training on ODS views and tables
- Easy to use access infrastructure



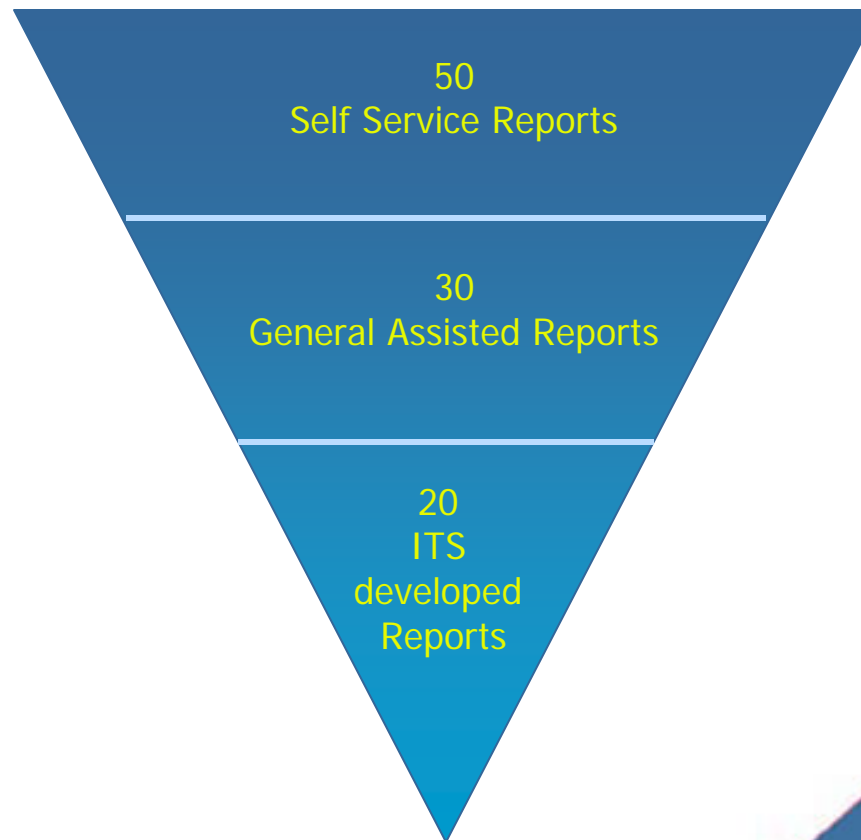
USD Information Access Roadmap



Copyright Sungard SCT



50/30/20 model



Some Timelines

- BODS team kick off – July 16th, 2007
- First set of reports – Admissions – Oct 2007
- Build ODS infrastructure – mid 2008
- Complete reporting requirements – 2008
- Start building EDW – late 2008
- EDW in place mid 2009



"Faces" Team Update



Interfaces Team Update

The Interfaces and Integration Team

Daniel Nichols	Registration, Financial Aid, Luminis
Ann Lander	Student Accounts, Oracle Financials
Kushan Hewa	DARS, Resource 25, WebCT
James Li	Oracle Human Resources
Dianne Seaman	University Relations
Tim Shaffer	University Relations
The Admissions Team **	Admissions
Chris Rapp	Banner Technical
Beth Lacy	Banner Technical

Interfaces Team Update

The Interfaces and Integration Project



It's about communication.

- Interfaces transmit data between systems.
- Banner must feed data to other systems.
- Other systems must feed data to Banner.

It's about trust.

- We must define the trusted source.
- "One version of the truth!"

It's about working together.

- Integration involves defining business processes that take place across multiple systems.

Interfaces Team Update

Interface Analysis Items

Purpose

- What does it do?

Categories

- Unnecessary
- Temporary
- Static
- Evolving

Direction

- From Banner
- To Banner

Associated Module(s)

- Admissions
- Registration
- Etc.

Frequency

- On Demand
- Scheduled
- “Live”



Interfaces Team Update

Interface Analysis Cont.

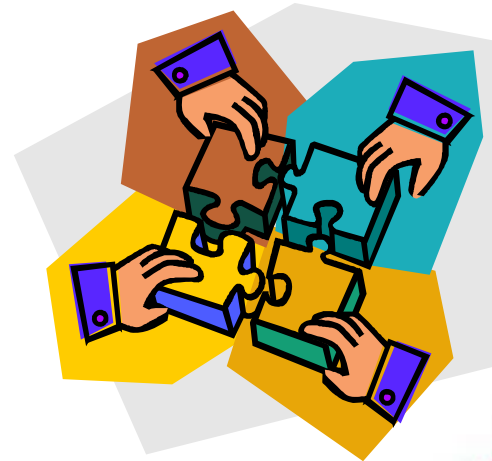
- “Faces” team meets every two weeks.
- Analysis tasks have been divided up among team members on a module-by-module basis (when possible)
- Focus is to identify, categorize and document the requirements associated with each Banner “go-live” event.



Interfaces Team Update

Integration Strategies

- Discussions with other institutions and vendors
 - Learn from their experiences
 - Discuss available tools
 - Upcoming technologies
- Evaluating multiple approaches
 - Traditional “point-to-point”
 - Hub-and-spoke
 - Centralized Views
- Direct integration to Banner
 - AppWorx
 - Luminis
 - WebCT



Interfaces Team Update

Project Status

- As of 6/19/2007, we've identified 47 specific interfaces.
- The module-by-module approach is evolving to a process-by-process approach.
- New team members added from University Relations
- Challenges
 - Scope definition
 - Processes ambiguity
 - "Knowing what we don't know"



Interfaces Team Update

Questions



Team REG



Several Pieces to “Go Live”

- Teams
- Strategy – Tasks
- Time Line
- Other Tasks



Pieces Toward Milestones: Teams

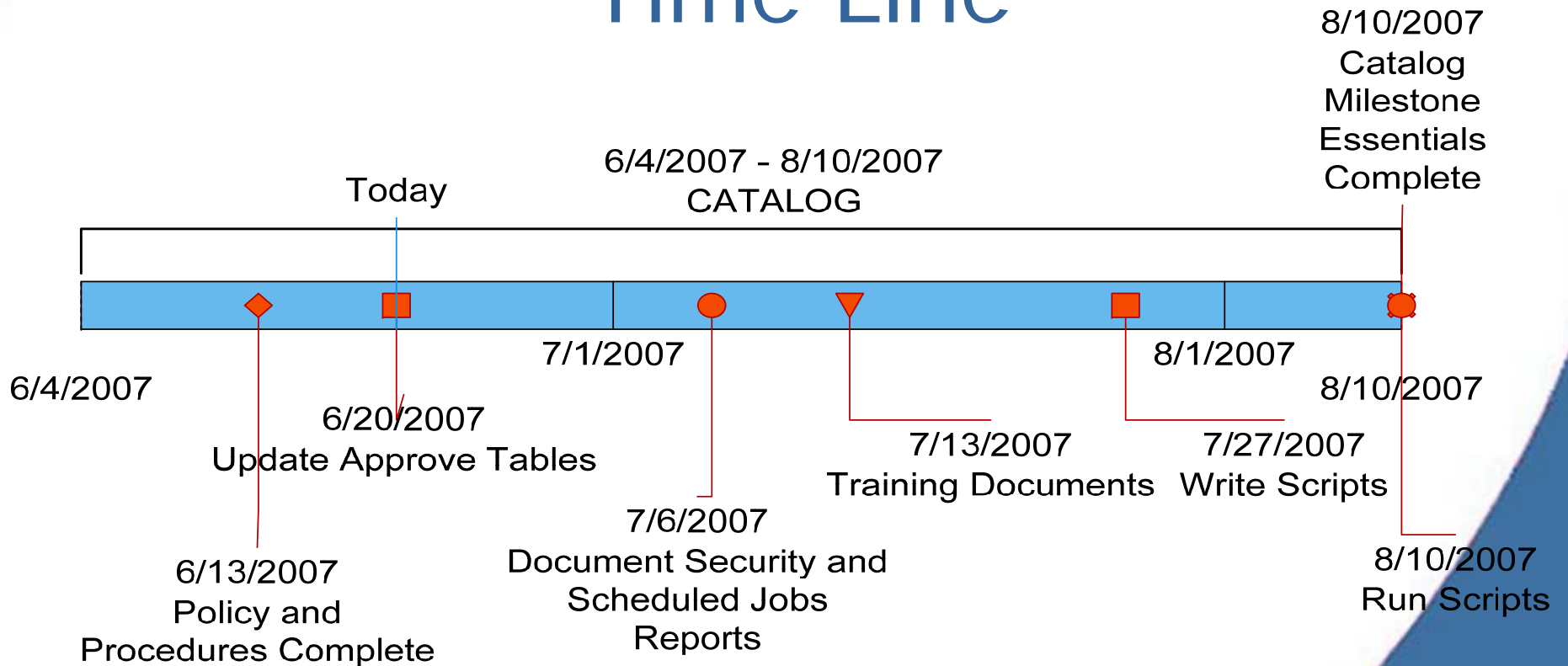
- Divided by Modules
- Invested Effort
- Training time frame
- Delegation of Tasks

Pieces Toward Milestones: Tasks

- Cyclical
- Shared Documentation
- Smaller Pieces (Less Overwhelming)
- Milestone Tracking
- Undivided Attention to Task



Time Line



- Same Tasks repeated in each module

Other Tasks

- Schedule/ Registration/Academic Records
- Interfaces
- Conversion



Team REG

- Aggressive Time Line
- Large Team
- Committed Members

Law Study Abroad



- Review of the current processes for Admitting a Law Study Abroad Student.
- Recommend changes to the process using new capabilities.
- Receive approval for the changes and plan to implement.

Law Study Abroad

The Current Process



Receive Application
and
send to Law
Admissions



Law Admissions does the
entry and Student-ID
assignment

Law Admissions sends
paper work back to Study
Abroad Office



Law Study Abroad

- Issues with current process:
 - Lots of paper shuffling
 - Hard to know where an application is in the process.
- Desired outcome:
 - Reduce the paper shuffling
 - Make it easier to get the student in the system

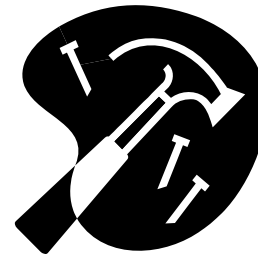


Law Study Abroad

What we did



Met with the
concerned parties



Used the tools available
(functionality available
in Banner)



To generate ideas



Made sure we stayed
within required policies



Law Study Abroad

RESULTS:

- Revised the process
 - Study Abroad will load their own applications into Banner.
 - The students will be eligible to register for Study abroad courses immediately

