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Banner General Proxy Access Handbook

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Overview

Proxy Access allows a person to set up access for a proxy, to designated Self-Service Banner pages.

For example, Ellucian University has decided to define two types of proxies, parents and potential employers. Proxy Access enables Ellucian University to allow students to authorize parental proxies to view pages such as, but not limited to, student schedules, assessments, final grades, and emergency contacts, and authorize potential employer proxies to view only student schedules and e-mail addresses.

Once these decisions are configured, students will then have the option to set up proxies. Each student can then decide who they want to serve as a parental proxy and who they want as potential employer proxies. Students may also decide to not set up any proxies. For each proxy, a student can select specific pages from the list of available pages to authorize.

For example, a student could set up the following proxies:

- Dad, a parent proxy, who can see assessments and emergency contact information.
- Mom, a parent proxy, who can see student schedule information and emergency contact information.
- Acme Corporation, a potential employer proxy, who can see student schedule information.



Note: If this student has a sibling at Ellucian University, that sibling could set up different proxy information and each parent could have access to different data for each child.

A proxy is a single entity within the system that is identified by their e-mail address. When a proxy logs in to Self-Service Banner, the proxy must specify which person they will be acting as if they serve as a proxy for more than one person. The proxy may switch between persons by selecting the tab for the person that they would like to act as.



Note: Proxies are authorized for specific pages, for a specific time frame.

Security concerns

When the proxy logs in to Self-Service Banner, the proxy will be literally acting as the person who authorized the proxy access. If your institution includes an update page in the list of potential pages that a proxy may access and this page is authorized for the proxy, the proxy will be able to make updates in the same fashion as the Banner person.



Warning! It is highly recommended that you do not make any Update pages available to proxies. Please limit proxy access to only Inquiry pages



Warning! Please be aware that there may be legal issues surrounding a third party updating pages on behalf of the student. It is up to your institution to be within the guidelines for the various state and federal rules.

The Proxy Access system is only as secure as the proxy e-mail account. For instance, if Student A and Student B have both defined ParentC@anywhere.net as a proxy, and Student A knows how to access Parent C's e-mail account then Student A could gain unauthorized access to Student B's information.



Warning! There is no record locking within the proxy functionality to prevent multiple updates from being attempted at the same time. As such, if a person and a proxy both attempt to update the same data at the same time, both updates will be allowed, however, only the last update will be retained. Similarly, if two proxies for the same person attempt to update the same data, only the last update will be retained.

Banner data

People who are setting up proxies for themselves need to be a Banner person with an active Self-Service Banner login. However, proxy users do not need to be a Banner person, therefore, your institution will need to make an implementation decision to decide what proxy data should be added to your Banner database, if any.

Although the examples in this guide will focus on baseline Self-Service Banner pages, the proxy access functionality extends to any local Self-Service Banner page that is accessible at your institution and calls `twbkwbis.F_ValidUser` to validate page security.

What pages can a proxy access?

A proxy will have access to a person's Self-Service Banner pages only when the following is true:

- The person currently has the `PROXYMGMT` role that is defined on `GORRSQL`.
- The relationship between the person and the proxy is between the defined start and stop dates. This information can be found in Banner under `GPAPRXY`.
- The page has been authorized for the proxy by the person. This information can be found on `GPAPRXY` under the Page Authorization List.

- The page is enabled at the procedure, menu, and menu option levels.
 - Procedure or Menu - **Enabled** is selected on the **Customize a Web Menu or Procedure** page.
 - Menu option - **Enabled** is selected on the **Customize the selected Menu Item** page.
- The person originating the proxy relationship is currently enabled in Banner security, GOBT PAC_PIN_DISABLED_IND is not Y. Please note that this can be removed as a condition if desired.

If you do not normally expire users in GOBT PAC, you may wish to reconsider that decision or remove the PROXYMGMT role from normal processing, as proxies could still access data for people who are no longer associated with your institution due to graduation or perhaps retirement.

Other uses of Proxy Access

Although a number of the tables, forms, and processes have been written for use by Proxy Access, these have been designed for re-use. For example, if your institution wishes to collect data about a population and wants to load this information into Banner, you could define a new system using GTVSYST, add in the system related data in the other validation and rules forms, collect the data in the new General Person temporary tables GENIDEN and GENBPSH, and run the general person match/load and have your person information loaded into Banner.

For example, this process is used with Banner General Events Management 9.0.

Pass phrase functionality

Pass phrase is a method for a proxy to verbally authenticate. For example, if a parent calls to get information about a student, the parent could use a pass phrase to indicate that permission has been given. Or, your institution may require a pass phrase before a pin reset will be performed. There is no other functionality in the system that uses the pass phrase. Proxy Access has simply provided a process to collect a pass phrase that is assigned by the Banner person for a proxy and your institution will need to decide how it will use the optional pass phrase functionality.

Proxy Access forms

The Proxy Access module uses the following Banner forms which can be found in the Proxy Access Forms [*GENPROXY] menu:



Note: The Proxy Access forms are delivered in the security class BAN_PROXY_ACCESS_C. No users will have access to these forms until you specifically assign users to the class or the class is included in an

existing security group. Please refer to the Security Administration Handbook for information related to assigning access to forms and classes.

Form	Description	Use
GERCOMM	Proxy Access Communication Rule Form	Allows you to maintain communication configuration information.
GERPRXY	Proxy Access Data Option Rules	Allows you to connect relationship types to the system, establish rules for loading data, and, optionally, establish relationship-level defaults for system options.
GPAPRXY	Proxy Access Administrative Form	Allows you to audit proxy activity for a person.
GRAPREL	Potential Banner Person Detail Form	Allows you to view the data that is available for a new proxy user, including information about the proxy and what data should be loaded into Banner for the proxy.
GRIPREL	Potential Banner Person Inquiry Form	Allows you to match and load data into Banner that is associated with a new proxy user.
GTVCTYP	Proxy Access Communication Type Validation Form	Allows you to maintain communication types.
GTVDTYP	Proxy Access Data Type Validation Form	Allows you to maintain data types for data loading.
GTVOTYP	Proxy Access Option Type Validation Form	Allows you to maintain system and option types.
GTVRETP	Proxy Access Relationship Type Validation Form	Allows you to maintain relationship types.
GTVSYST	Proxy Access System Code Validation Form	Allows you to maintain system types.

Proxy Access process

The Proxy Access module uses the following Banner process:

Form	Description	Use
GORSRIN	Proxy Prospect Match	Banner batch process used to match and load information for new people.

Proxy Access roles

The following WebTailor roles are delivered with the Proxy Access module:

Role	Description
Proxy Access	The Proxy Access role can be assigned to a Self-Service Banner user if they needed to access Proxy Access through SSB instead of through the Proxy Access Login page. This is defined in the GORRSQL rule SSB_ROLES / SSB_ROLE_PROXYACCESS.
Proxy Management	The Proxy Management role can be assigned to any Self-Service Banner user who is allowed to give proxy to their information. This is defined in the GORRSQL rule SSB_ROLES / SSB_ROLE_PROXYMGMT.
Proxy Access (Support Enabled)	The Proxy Access (Support Enabled) role is assigned to Self-Service Banner pages that a user does not access, but are needed to access the pages that the user has enabled for access. This role does not need to be assigned to a user.
Global Access	The Global Access role provides the ability to create a proxy for any person. For example, this would allow the registrar to view any student without making the student create the proxy. This role should be used with great care.
Proxy Global Access Target	This is the role that would be assigned to any SSB user who is set up as a potential Global Proxy Access's target. This is defined in the GORRSQL rule SSB_ROLES / SSB_ROLE_PROXYTARGET.

Role	Description
Web Tailor PROXYACCESS	<p>The Web Tailor PROXYACCESS role allows the Proxy Access to be assigned without the use of the GORRSQL rules.</p> <p>This functionality is only enabled if the GORRSQL rule as defined in “SSB users who have WTAILORPROXYACCESS role” on page 56 is activated.</p>
Web Tailor PROXYMGMT	<p>The Web Tailor PROXYMGMT role allows the assignment of Proxy Management without the use of the GORRSQL rules.</p> <p>This functionality is only enabled if the GORRSQL rule as defined in “Select SSB users who have the WTAILORPROXYMGMT role” on page 52 is activated.</p> <p>In some cases, there may be a need to manually assign a user the Proxy Access or Proxy Management role, and therefore the 'Web Tailor PROXY' roles and related GORRSQL rules are available, however they do not need to be used. If they are not needed, it is suggested that the related GORRSQL rules not be activated.</p>

How to Get Started

To use Proxy Access, you must have installed the following products:

- Banner General 8.5 or greater
- Banner Student 8.2 or greater
- Banner Web General 8.5 or greater
- Web Tailor 8.5 or greater

Validation codes

The following Banner validation forms are used to customize the Proxy Access module for your institution. For more details about a specific validation form, please refer to online help.

Table 1:

Validation Form	Contents
Proxy Access Communication Type Validation Form (GTVCTYP)	Define communications types.
Proxy Access Data Type Validation Form (GTVDTYP)	Define data types.
Proxy Access Option Type Validation Form (GTVOTYP)	Define system and option types.
Proxy Access Relationship Type Validation Form (GTVRETP)	Define relationship types.
Proxy Access System Code Validation Form (GTVSYST)	Define system codes.

Configure Proxy Access

To configure Proxy Access, complete the following steps:

Review form security

The Proxy Access forms are delivered in the security class BAN_PROXY_ACCESS_C. No users will have access to these forms until you specifically assign users to the class or the class is included in an existing security group. Please refer to the Security Administration Handbook for information related to assigning access to forms and classes.

Review system types

Access the Proxy Access System Code Validation Form (GTVSYST) and review following delivered system codes:

- PROXY - Proxy Access
- PROXY_GLOBAL_ACCESS - Proxy Access Global Administrative Access

For additional information Global Proxy Access, please see [“Global Proxy Access” on page 75](#).

Review data load types

Access the Proxy Access Data Type Validation Form (GTVDTYP) and review the following delivered data load types:

- ADVANCEMENT - Banner Advancement
- PERSON - Banner General
- PROXY - Banner Web Proxy Access

For additional information related to these types of data and how your institution can add additional types of data pushes, please see [“Push Processing” on page 71](#).

Configure e-mail communications

Access the Communication Type Validation Form (GTVCTYP) and review the following delivered communication types:

- CANCEL_EMAIL
- CURRENT_AUTHORIZATION
- DELETE_RELATIONSHIP
- NEW_EMAIL
- NEW_PROXY
- NEW_RELATIONSHIP
- PASSPHRASE

- PIN_RESET
- PROFILE_CHANGE
- UPDATE_RELATIONSHIP

Configure relationship types

Access the Proxy Access Relationship Type Validation Form (GTVRETP) and determine what additional relationship types are needed at your institution beyond the following delivered relationship types:

- AAA - Relationship not Selected
- ADVISOR (Optional) - Academic Advisor
- COACH (Optional) - Coach or NCAA Representative
- EMPLOYER (Optional) - Employer or Hiring Agency
- PARENT (Optional) - Parent or Legal Guardian



Note: AAA is a required relationship type and may not be modified or deleted.

Update system options

Access the Proxy Access Option Type Validation Form (GTVOTYP) and review all system options. Ensure that you update any options that need to be updated for your institution.

For more information on system options, please see [“Define Options on GTVOTYP” on page 33](#).

Configure data overrides

Access the Proxy Access Data Option Rules (GERPRXY) and for each relationship type that your institution will be using, review both the data types to be loaded and set up any overrides of the system defaults. GERPRXY is used to associate relationship types with system types.

Configure communication rules

Access the Proxy Access Communication Rule Form (GERCOMM) and update the rules defined for each communication. For more information, please see [“Configure Communications” on page 28](#).



Note: You will need to update the rules defined for each communication for every relationship type.



Note: You may configure communications for all proxies or for all proxies of a specific relationship type.



Note: It is recommended that you disable the use of the NEW_RELATIONSHIP as the UPDATE_RELATIONSHIP message contains additional information on the type of relationship that was established.

Enable e-mails from a communication type

To enable e-mails from a communication type, perform the following steps:

1. Access the Proxy Access Communication Rule Form (GERCOMM).
2. Select a system code.
3. Select a communication type.
4. Click **Next Block**.
5. Select **Send e-mail?** for the letter codes for which you wish to enable e-mails.
6. Click **Save**.

Disable e-mails from a communication type

To disable e-mails from a communication type, perform the following steps:

1. Access the Proxy Access Communication Rule Form (GERCOMM).
2. Select a system code.
3. Select a communication type.
4. Click **Next Block**.
5. Clear **Send e-mail?** for the letter codes for which you wish to disable e-mails.
6. Click **Save**.

Set SQL to implement rules

As an administrative user with the appropriate permissions, access the Business Rules (GORRSQL) form to set up SQL to implement your institution's rules for the following:



Note: In most circumstances, a DBA or other technical staff member will most likely need to be involved in making and testing changes made to the GORRSQL rules.

- Determine what populations are eligible to create proxies for themselves. For an active Self-Service Banner user to be able to designate a proxy for themselves, that user must have the Self-Service Banner role of PROXYMGMT (Proxy Management).
- Determine who can act as a proxy via secure Self-Service Banner using the PROXYACCESS role.
- What Self-Service Banner users will display as potential proxies using the PROXYMGMT_ADD_LIST rule.
- Determine which group of Banner persons could be the target of a Global Proxy.



Warning! *cross ref to glkbal proxy access limitations*

Dynamic role assignment can be performed via rules established on the Business Rules (GORRSQL) form. To implement the rules for your institution, please perform the following steps:

1. Access the Business Rules (GORRSQL) form.
2. Select the SSB_ROLES process and the SSB_ROLE_PROXYMGMT rule and click **Next Block**.
 - 2.1. Determine what populations are eligible to create proxies for themselves. Some possible populations include the following:
 - Select SSB users who have signed off on FERPA as defined by a population selection
 - Select SSB users who have WTAILORPROXYMGMT role (staff testing)
 - Select SSB users who have been coded within TVRAUTH
 - Select SSB users who are members of a student cohort



Note: Sample rules for these populations are delivered as inactive and are not validated. Before the rules can be used at your institution, they must be analyzed, validated, and activated.

To use these rules, you must ensure that the Web Tailor Parameter ENABLE_GORRSQL_SSB_ROLES is set to Y.

These sample rules are documented in [“Sample GORRSQL Rules” on page 51](#). You can use these as a template for configuring your own populations.

- 2.2. Decide on the precursor permissions that must be followed before an eligible individual can create proxies.

In the United States, these permissions may be tied to your institution's FERPA policy. For example, as in one of the delivered samples, you may require a student to generically approve sharing information through Proxy Access and record that approval in Banner as an attribute.

- If this permission must be obtained and it is stored online, configure the process `SSB_ROLES` process and `SSB_ROLE_PROXYMGMT` rule on GORRSQL to look for this permission.
- If this permission must be obtained and it is not stored online, you may need to revise your business process so that the permission is accessible.
- If this permission is not required, you should not include this logic in GORRSQL.

2.3. Decide if a proxy can access information for a person whose Banner access has been disabled.

The `SSB_ROLES` process and `SSB_ROLE_PROXYMGMT` rule on GORRSQL determine who is eligible to create a proxy and include the following clause to check if the person's Banner access is enabled:

```
GOBTPAC_PIN_DISABLED_IND != 'Y'
```

This clause ensures that once a person is no longer active, a proxy for that person, such as a parent, cannot access any authorized pages for this person either.



Note: You may have to adjust this type of rule based upon the definition and setting of active at your institution.

If you wish to allow a proxy to access information for a person who does not currently have Banner Self-Service access, this clause should be removed and/or disabled.

3. Access the Business Rules (GORRSQL) form, select the `SSB_ROLES` process and the `SSB_ROLE_PROXYACCESS` rule and click **Next Block**.

Decide if you want to allow proxy access from within secured Self-Service Banner or if you wish to have all proxies use the special access provided for proxies.



Note: You may want to allow proxy access from within secured Self-Service Banner so that current Self-Service users can act as a proxy without needing to authenticate using two different methods.

If you want to provide this functionality, configure the process `SSB_ROLES` process and the `SSB_ROLE_PROXYACCESS` rule to identify these people.

Please consider the following when allowing proxy access from within secured Self-Service Banner:

- Is a PIDM part of a population selection?
- Are there Self-Service Banner users who have the `WTAILOPROXYACCESS` role used for staff testing?
- Are there Self-Service Banner users who have an active proxy relationship?



Note: Sample rules for these populations are not delivered as active, nor are they validated. Before the rules can be used at your institution, they must be analyzed, validated, and activated.

To use these rules, you must ensure that the Web Tailor Parameter `ENABLE_GORRSQL_SSB_ROLES` is set to Y.

These sample rules are documented in [“Sample GORRSQL Rules” on page 51](#). You can use these as a template for configuring your own populations.



Note: If you will be using Global Proxy Access, [“Global Proxy Access” on page 75](#) for information on setting up rules for the Banner persons that can be a target for a Global Proxy Access user.

4. Access the Business Rules (GORRSQL) form, select the `PROXY_ACCESS` process and the `PROXYMGMT_ADD_LIST` rule and click **Next Block**.

You may optionally decide to display potential proxies to add and select, in addition to any proxies that are entered manually, such as advisors or coaches.



Note: These Banner persons must have an active e-mail address and the SQL rule must return a PIDM and an e-mail address.

Potential proxies could include Self-Service Banner users who have an Advancement cross-reference to this person or users who serve as the primary advisor.



Note: Sample rules for these populations are not delivered as active, nor are they validated. Before the rules can be used at your institution, they must be analyzed, validated, and activated.

These sample rules are documented in [“Sample GORRSQL Rules” on page 51](#). You can use these as a template for configuring your own populations.

Configure Web Menus and Procedures in Web Tailor

In Web Tailor Administration, enable and establish the Web Tailor menus that are associated with each relationship type using the Customize a Web Menu or Procedure page. For more information, please see [“Web Tailor Configuration” on page 46](#).



Note: This is case sensitive, please use upper case characters when associating Web Tailor menus with relationship types.

In Web Tailor Administration, establish the pages that are associated with the Web Tailor menu using the Reorder or Customize Menu Items page.

Configure Information Text in Web Tailor

In Web Tailor Administration, modify the information text and images, as needed, for each entry in Proxy Access. For more information on the information text that can be customized, please see [“Information Text in Web Tailor” on page 59](#).

Configure Web Tailor Parameters

Configure the following Web Tailor Parameters:

Table 2:

Parameter	Configuration Setting
ENABLE_GORRSQL_SSB_ROLE S	Set to Y if you will be using GORRSQL rules to define Self-Service Banner roles dynamically.
PROXYACCESS_ROLE_ENABLE D	<p>This is a control variable used by the dynamic rules for the PROXYACCESS role. This is used in the sample GORRSQL rules. Set to Y if your institution wants to allow proxy access from within secured Self-Service Banner. The alternative is to force all proxies to use the proxy access login using e-mail address and PIN authentication.</p> <p>If desired, this parameter could be used in a GORRSQL rule to easily activate or deactivate certain rules instead of having to inactivate the rules on GORRSQL.</p>
PROXYMGMT_ROLE_ENABLED	<p>This is a control variable used by the dynamic rules for the PROXYMGMT role. This is used in the sample GORRSQL rules. Set to Y if your institution wants to define who can establish proxy relationships via GORRSQL rules.</p> <p>If desired, this parameter could be used in a GORRSQL rule to easily activate or deactivate certain rules instead of having to inactivate them on GORRSQL itself. Some of the sample rules include a check for this rule being set to Y. If desired, other custom rule(s) could test this value as well.</p>

Table 2:

Parameter	Configuration Setting
PROXY_ACCESS_DAD	<p>Set to the DAD for Proxy Access. Typically this will be the same as Self-Service Banner DAD, but it gives you the option of having Proxy Access on a separate instance.</p> <p>If the value of PROXY_ACCESS_DAD is NULL or / the value of the current DAD will be returned. If you do not wish to override the DAD, you should set PROXY_ACCESS_DAD to / (a slash).</p>
PROXY_ACCESS_EMAIL_FROM	<p>Set to the value used as the From address on e-mails sent from Proxy Access. This value is also used as the system default administration e-mail address.</p> <p>The email could be from a specific person, a generic ID, or a distribution list.</p> <p>If desired, this value can be overridden on the GERCOMM form for specific communication types.</p>
PROXY_ACCESS_JQUERY	<p>The delivered value is /js/jquery-1.6.1.min.js, but you may change this if needed.</p>
PROXY_ACCESS_JQUERY_COOKIE	<p>The delivered value is /js/jquery.cookie.js, but you may change this if needed.</p>
PROXY_ACCESS_JQUERY_UI	<p>The delivered value is /js/jquery-ui-1.8.13.custom.min.js, but you may change this if needed.</p> <p>The JQuery UI library must contain support for tabs.</p>
PROXY_ACCESS_JQUERY_UI_CSS	<p>The delivered value is /css/ui-lightness/jquery-ui-1.8.13.custom.css, but you may change this if needed.</p>
PROXY_ACCESS_JS_LOC	<p>Set the value to the location for the Proxy Access js objects, bwgkpxya.js and bwgkpxym.js. The standard location is /js/.</p>

Proxy Access Process Flow

Once your system is configured, users will be able to use it as follows:

1. A Banner person who is eligible to create proxies for herself/himself signs into Self-Service Banner and selects the Proxy Access tab or menu.

2. On the Add Proxy page, the person will either provide required preliminary information about the proxy such as First Name, Last Name, and E-mail Address, or select the proxy from a list of presented possibilities if defined with the PROXYMGMT_ADD_LIST process identified earlier in this chapter.



Note: A person can only have a single proxy relationship with another person. For example, if you are a parent proxy, you cannot also be a potential employer proxy for the same person. However, a proxy may have multiple relationships, for example, multiple children may establish a proxy with their parents.

Proxies are uniquely identified by an e-mail address that is not case sensitive.

3. When the person submits the proxy's information, the new proxy communication is formatted and sent out. The communication sent to the new proxy includes an action URL and an action password. For more information on modifying the communication that is sent out, see ["Configure Communications" on page 28](#).



Note: The action URL is a single use URL, therefore a potential proxy cannot use it to access the system repeatedly. Subsequent uses of the action URL will redirect to the proxy login page.

The proxy PIN is stored in the database as an encrypted value. A proxy or related person who wishes to reset the PIN will receive an e-mail message that must be used to set a new PIN.

4. The Banner person who set up the proxy can change the specific pages or group of pages for their proxy or proxies at any time.
5. The proxy receives the new proxy e-mail, accesses the URL, and enters the action password to authenticate.
6. If the proxy is of a relationship type that will be loaded into Banner, additional information may need to be collected on the proxy profile tab. Once this has been entered, the proxy can select a person tab and view the authorized pages.



Note: The fields that are required at your institution can be configured. For more information, please see ["Define Options on GTVOTYP" on page 33](#).

7. The proxy will be connected to Self-Service Banner and can now begin to access the page(s) that were authorized for them by the Banner person. On the Proxy Profile page, the proxy can request a pin reset, change their associated e-mail address, as well as update other profile information, but the proxy cannot change the pages that they are eligible to access.

If the proxy has been granted access to a page that allows updates, the proxy will be able to update data.



Warning! Granting access to a page that allows updates is not recommended. Please see [“Security concerns” on page 6](#) for more information.

8. If the proxy is of a relationship type that should be loaded into Banner, the GORSRIN process can be run to match and load the proxy’s data or the GRIPREL form can be used to match and load the proxy’s data.
9. At any point, the original person may alter the proxy relationship, not only modifying the pages the proxy can access but they can also inactivate the proxy relationship using the start and stop dates.



Note: Terminating a proxy relationship will not remove the proxy from any tables.

At any point the original person may delete the proxy relationship. For more information, see [“Delete a proxy relationship” on page 24](#).

10. At any point, authorized staff can use the GPAPRXY form to review the proxies that have been set up for a Banner person, see a list of authorized pages, a history of authorized pages accessed by the proxy, a history of communications sent to the proxy, and view relationship data including description, pass phrase, start, and stop dates.



Note: The amount of detail available is dependant upon configurable settings. For more information, please see [“Logging options” on page 33](#).

Test Proxy Access

The following steps can be used to test that the proxy configuration has been completed successfully:

1. Verify the following configuration settings:
 - 1.1. Ensure that the relationship types that you are testing are defined in GTVRETP.
 - 1.2. Verify that the Proxy Access menu(s) are set up in Web Tailor. The case sensitive naming convention used is PROXY_ACCESS_RELATIONSHIP-CODE_OptionalSortParameter where RELATIONSHIPCODE is defined in GTVRETP.
 - 1.3. Ensure that communications are set up for the relationship type you are testing in GERCOMM.
2. Identify in Banner the person who will be initiating the proxy relationship as Person A. If necessary, you can create a new person in Banner.
3. Ensure that Person A is eligible to initiate proxies by ensuring that the rules that have been set up to implement your institution’s FERPA or other privacy policies are

followed. This is stored in the `SSB_ROLES` process and `SSB_ROLE_PROXYMGMT` rule on `GORRSQL`.

4. Identify the proxy as `Proxy B` and ensure that this person has an e-mail address that you can use as `Proxy B`.



Note: You may search for “The 'Plus' Side of Gmail” for a tip on using a Gmail account for testing. For example, if my Gmail account is `myemail@gmail.com` then I can use `myemail+1@gmail.com` and `myemail+2@gmail.com` as unique e-mail addresses that will both get delivered to my standard Gmail inbox.

5. Login into secure Self-Service Banner as Person A.
 - 5.1. Access the Proxy Access menu and select the Proxy Management page.
 - 5.2. Add `Proxy B` as a proxy and authorize `Proxy B` for whatever pages you would like to test.
6. `Proxy B` will receive an e-mail with an action URL and action password. Use the URL and password to authenticate and create proxy PIN credentials for `Proxy B`.
7. Login to Proxy Access as `Proxy B` to test `Proxy B`'s access.
8. If `Proxy B` is a proxy that needs to go through Common Matching and the load process, `Proxy B` will need to enter profile information. The required proxy profile data is controlled by option parameters and is cumulative with all the relationship types that the proxy may have.
9. Use `GPAPRXY` to verify `Proxy B`'s proxy activity.
10. To test Common Matching and the load process, perform one of the following tasks:
 - Run `GORSRIN` for batch testing.
or
 - Use `GRIPREL` and `GRAPREL` for online testing.



Note: Two new directories, `PROXY_UPLOAD` and `PROXY_ACCESS`, must be created for use by the `GORSRIN` batch matching process pointing to the `jobsub` directory. To create these directories, perform the following steps:

- 10.1. Login as `BANINST1` or as a `DBA`.
- 10.2.

```
CREATE DIRECTORY PROXY_UPLOAD AS '<directory to be used for proxy uploads>';
```

For example:

```
CREATE DIRECTORY PROXY_UPLOAD AS '/home/proxy/uploads/';
```
- 10.3.

```
CREATE DIRECTORY PROXY_ACCESS AS '<directory to be used for output reports>';
```

For example:

```
CREATE DIRECTORY PROXY_ACCESS AS '/home/proxy/
uploads/';
```

```
10.4.GRANT READ,WRITE ON DIRECTORY PROXY_UPLOAD TO PUB-
LIC;
```

```
10.5.GRANT READ,WRITE ON DIRECTORY PROXY_ACCESS TO PUB-
LIC;
```

Other considerations

Depending on what specifically you want to test, you can vary the preceding steps to test items like the following:

- Do you want multiple people to proxy to the same person? If so, you will need Person A1, Person A2, and so on, as well as Proxy B.
- Do you want one person to have multiple proxies? If so, you will need Person A, Proxy B1, Proxy B2, and so on.
- Do you want to test having the person pick from a list of potential proxies? If so, the rules for this are in the PROXY_ACCESS process and the PROXYMGMT_ADD_LIST rule on GORRSQL.

Delete a proxy relationship

To delete an existing proxy relationship, perform the following steps:



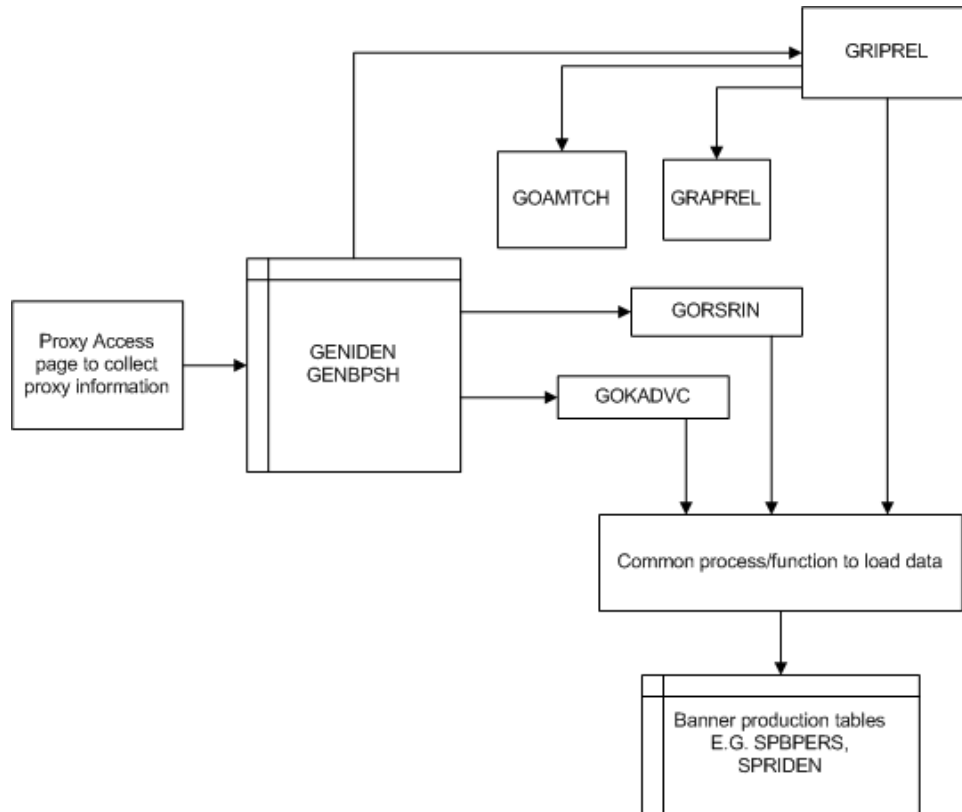
Note: The Delete Proxy functionality must be enabled via the ENABLE_DELETE_RELATIONSHIP option on GTVOTYP. Additionally, the GTVOTYP option for ENABLE_DELETE_AFTER_DAYS indicates how many days must have passed since the proxy last accessed their account. If either of these conditions are not met, the Delete Proxy Relationship option will not be available.

1. Login to Self-Service Banner with a user account that can access the Proxy Access tab.
2. Select **Proxy Access > Proxy Management**.
3. Click **Expand** for the proxy relationship that you would like to delete.
4. Click **Delete Proxy Relationship**.
5. Click **OK** to confirm the deletion of this Proxy relationship.

The proxy relationship and all historical information has been deleted and the Delete Proxy Relationship email has been sent to the proxy.

Use the General Person Load process

The following diagram displays the General Person Load process:



Individual record loads

To load individual records, please perform the following steps:

1. Use the Potential Banner Person Inquiry (GRIPREL) form to query the temporary tables for potential Banner persons. You search using any of the fields.



Note: The search fields are case-sensitive.

2. Once a matching record or group of potential matches has been retrieved, select a specific record and select the **Detail** item in the **Options** menu to open the Potential Banner Person Detail (GRAPREL) form.
3. The primary tab on this form displays biographical information associated with the record selected on GRIPREL. You can also use the second tab to see what data is

eligible to be loaded into Banner as individual records can be turned off and on from this tab.

Once you have the correct person, use the Exit button to return to the Potential Banner Person Inquiry Form (GRIPREL).

4. If the record's **Load Status** and **Match Status** fields are blank, indicating that this record has not been matched or loaded, you must check to see if the person already exists in Banner.
5. Select **Match and Update** in the Options Menu on GRIPREL to go to GOAMTCH.
6. On GOAMTCH, the **ID** field will contain `GENERATED` and the **Matching Source** field will contain the matching source code that has been assigned to the user ID on GORCMUS.

If no default source code has been assigned on GORCMUS, then you will be able to select any matching source code from the List of Values.

7. Perform a Next Block to populate the Data Entry block with all the data for the incoming person record that is present in the temporary tables.

You can update or adjust the data in the Data Entry block if it does not meet your institution's data standards. These updates will be copied back to the temporary tables and used when the person's record is created.

8. Perform a Next Block to run the matching algorithm. The algorithm will determine if the incoming record is new, matched, or a potential match. Determine if the record is to be new or matched, and click the appropriate button.

You will be automatically returned to GRIPREL and the match status will always be `Match`, as the person has now been created in Banner via GOAMTCH.

9. On return from a successful match, the ancillary data will be created and/or loaded.
 - If the person has a GENBPSH flag for proxy data and the indicator is set to `Y`, the match and update process will update the appropriate proxy data and mark the GENBPSH record as loaded.
 - If the person has a GENBPSH flag for Advancement data and the indicator is set to `Y`, the match and update process will create and/or update the appropriate Advancement data and mark the GENBPSH record as loaded.
10. The Match Status field will have been updated and will display `Match` for this record when a new query is run. Assuming that the common matching updates were successful, the Basic Person Load Status will be set to `Complete`, indicating that a Banner record has been created and/or updated for this person.

API errors

When the records are loaded manually using GRIPREL, if API errors are encountered, those errors will be displayed and the Match Status will revert back to `Suspense`. No Banner data will be loaded for these records as the API errors need to be resolved before the record can be re-matched and loaded into Banner.

GOAMTCH processing

GOAMTCH will attempt to insert or update records in the following areas:

- SPRADDR (address)
- SPRTELE (telephone)
- SPBPERS (biographical)
- SPRIDEN (identification)
- GOREMAL (e-mail)

Using GRAPREL

The Potential Banner Person Detail (GRAPREL) form displays basic biographic and demographic data about the potential Banner person on the Potential Banner Detail tab. This data is display only and cannot be updated on this form.

The Potential Person Load Info displays the information about the loads planned for the selected person. The load status flags can be overridden. Each combination of data type and Banner person can be individually adjusted as each combination will also have its own status flag.

For example, if two students proxy to the same parent, the following entries will display for the parent/proxy:

Data type	Create data type?	Load status	Load date	Auxiliary data	Associated ID	Associated name
Advancement	Checked (yes)			PAR	123234345	Student, Pat
Advancement	Checked (yes)			PAR	345234123	Student, Jo
Proxy	Checked (yes)			PAR	123234345	Student, Pat
Proxy	Checked (yes)			PAR	345234123	Student, Jo
Person	Checked (yes)			PAR	123234345	Student, Pat
Person	Checked (yes)			PAR	345234123	Student, Jo



Note: The Auxiliary data will only be used for the Advancement load to set up the Advancement cross-reference.

Deselecting an entry will ensure that the load process will not update that combination.

Configure Communications

This section contains information on configuring Proxy Access communications.

Communication Types

The communications that Proxy Access can send out include the following:

- CANCEL_EMAIL – Message to the proxy allowing them to cancel an e-mail address change request. This message contains a single-use action URL and action password which should only be sent to the proxy.



Note: Two e-mail messages are sent when a proxy changes their e-mail address. A cancel e-mail message is sent to the old e-mail address with an action URL that will allow the user to cancel the change and rollback the proxy profile to the original e-mail address.

- CURRENT_AUTHORIZATIONS – Message sent to the proxy indicating the current set of authorized pages for the particular Banner person
- DELETE_RELATIONSHIP - Message sent to the proxy indicating that their proxy relationship has been deleted.
- NEW_EMAIL – Message to the proxy allowing them to confirm an e-mail address change request. This message contains a single-use action URL and action password which should only be sent to the proxy.



Note: Two e-mail messages are sent when a proxy changes their e-mail address. A confirm e-mail message is sent to the new e-mail address with an action URL that will allow the user to confirm the change.

- NEW_PROXY – Message sent to a new proxy, inviting the proxy to authenticate. The e-mail contains an action URL and action password that allows the proxy to set their PIN. This message contains a single-use action URL and action password which should only be sent to the proxy.



Note: The NEW_PROXY email is sent the first time a proxy is set up, for the first person. If a second person initiates a relationship with this proxy, only the NEW_RELATIONSHIP email is sent.

- NEW_RELATIONSHIP – Message sent to a proxy to inform the proxy that the Banner person has created a relationship between them.



Note: It is recommended that you use the UPDATE_RELATIONSHIP message instead of NEW_RELATIONSHIP as the UPDATE_RELATIONSHIP message contains important details on the type of relationship that was established, while the NEW_RELATIONSHIP message does not. For more information on modifying GERCOMM settings, please see [“Configure communication rules” on page 14.](#)

- PASSPHRASE – Message sent to a proxy to inform the proxy that the Banner person has defined a passphrase and wants to send it to the proxy.
- PIN_RESET – Message sent to proxy indicating that a pin reset has been requested. This message contains a single-use action URL and action password which should only be sent to the proxy.
- PROFILE_CHANGE – Message sent to the administrator indicating that the proxy’s profile has been modified.



Note: This message contains profile change data and should only be sent to the administrator. This may be useful information for a campus that does not load proxy data automatically.

- UPDATE_RELATIONSHIP - Message sent to a proxy to inform the proxy that the Banner person has changed the relationship between them.

Every communication does not need to be sent out and each institution can configure the communications that will be used by setting the appropriate ‘Send e-mail to’, person, admin, or proxy indicators on the GERCOMM form. However, it is recommended that the following communications be used:

- NEW_PROXY – without this, a new proxy cannot set up credentials or login
- PIN_RESET – without this, a proxy cannot reset her/his pin

Send multiple e-mails

Proxy Access can be configured to send two e-mails for any of the available communication types. For example, to improve security, in cases where a URL and a pin are to be e-mailed to a user, you may wish to send the URL and pin in separate e-mails.

To generate two e-mails for a communication type, the second e-mail must have the same LETTER_CODE as the first e-mail, with the number 2 appended to the end of the LETTER_CODE. For example:

First e-mail LETTER_CODE - GP_CONFIRMEMAIL

Second e-mail LETTER_CODE - GP_CONFIRMEMAIL2

There is no need to define the second letter code on GERCOMM, because if it exists, it will automatically be processed by Banner General Proxy Access.



Note: The second letter must be created on GTVLETR, SOAELTL, and SOAELTR as any other letter would be defined.

Customize e-mail communications

If you wish to customize any of the communications, you may do so using the following forms:

- Letter Code Validation (GTVLETR)
- HTML Letter Rules (SOAELTL)
- HTML Letter Module Validation (STVELMT)
- Format HTML Letter Rules (SOAELTR)

For more information on these forms, please see the *Banner General User Guide*, the *Banner Student User Guide*, and the Online Help for each of the forms.

Once the formatted communications have been defined, they need to be associated with a specific communication type on the Proxy Access Communication Rule Form (GERCOMM).

Sample new proxy e-mail definition

In the following image, please note that the GOVELTR_CTYP_URL and GOVELTR_PROXY_SALT variables are what the proxy will need to access the system for the first time.

Communication data elements

The GOVELTR view contains the following data elements that can be used in e-mail messages:

Table 3:

Column	Description
GOVELTR_ROWID_KEY	Unique identifier of the e-letter record.
GOVELTR_PROXY_IDM	Proxy identifier.
GOVELTR_PROXY_PIDM	Proxy PIDM if matched in SPRIDEN.
GOVELTR_PROXY_NAME	Proxy full name.
GOVELTR_PROXY_EMAIL	Proxy e-mail address.
GOVELTR_PROXY_OLD_DATA	Used to store the previous e-mail address.
GOVELTR_PROXY_NEW_DATA	Used to store the new e-mail address.
GOVELTR_PROXY_PASSPHRASE	Proxy passphrase.
GOVELTR_PROXY_SALT	Proxy salt value for encrypting the PIN, used as the action password.
GOVELTR_PERSON_PIDM	PIDM of person initiating the action.
GOVELTR_PERSON_NAME	Full name of person initiating the action.
GOVELTR_PERSON_EMAIL	E-mail address of person initiating the action.
GOVELTR_CTYP_CODE	Communication type code.
GOVELTR_CTYP_DESC	Communication type description that is used as the subject.
GOVELTR_CTYP_URL	Action URL.
GOVELTR_ADMIN_EMAIL	Reply-to e-mail address of administrator.
GOVELTR_RETP_CODE	Relationship code.
GOVELTR_RETP_DESC	Relationship description.



Note: The GOVELTR_PERSON and GOVELTR_RETP columns will be empty if the action is initiated by the proxy.

Define Options on GTVOTYP

The Proxy Access Option Type Validation (GTVOTYP) form allows you to define options in the following categories:

- Logging options
- Profile options
- Data load options
- Other options

Logging options

The following logging options may be specified:

Option Type Code	Description
AUTHORIZATION_IN_HISTORY	<p>Record authorization changes in history. Valid values are:</p> <p>Y - Record all authorization changes in the audit, both granting and revoking.</p> <p>N - Do not record authorization changes.</p> <p>This option is used by the <code>gt_gprauth_audit_row</code> trigger. Ensure that the trigger is <code>VALID</code> and <code>ENABLED</code> to be able to track the changes.</p> <p>The default is <code>Y</code>.</p>
LOGIN_IN_HISTORY	<p>Record proxy login history. Valid values are:</p> <p>Y - Record all logins by the proxy for the Banner person in the audit.</p> <p>N - Do not record login history.</p> <p>In this case, login can be defined as the proxy has selected the person and activated a <code>ProxyAccess</code> cookie.</p> <p>The default is <code>Y</code>.</p>

Option Type Code	Description
PAGE_DISPLAY_IN_HISTORY	Record display of page in history. Valid values are: Y - Record all pages visited by the proxy for the Banner person in the audit. N - Do not record page history. The default is Y.

Profile options

The following profile options allow you to specify the data that should display or be required on the Proxy Profile page:

Y – Data is required

V – Data is visible and may be entered, but is not required

N – Data is not displayed on the profile page



Note: If the N is selected for a field, that field will not be included in the profile e-mail that would be generated.

Information that is contained in profile update e-mails can be masked using the rules established on GORDMSK and GORDMCL. The GORDMCL rules have been delivered so that if masking is desired, it can be set up on GORDMSK.

Option Type Code	Description
PROFILE_BIRTH_DATE	Birth date of the proxy. Valid values are: Y - Data is required. V - Data is visible and may be entered, but is not required. N - Data is not displayed on the profile page. The default is Y.

Option Type Code	Description
PROFILE_CITY	<p>City in which the proxy resides. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is Y.</p>
PROFILE_CNTY_CODE	<p>County code for the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is N.</p>
PROFILE_EMAIL_ADDRESS	<p>E-mail address of the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>This value must always be set to Y.</p>
PROFILE_FIRST_NAME	<p>First name of the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>This value must always be set to Y.</p>
PROFILE_HOUSE_NUMBER	<p>House number of the proxy that is typically used internationally to separate the street number into a separate field from the street name. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>For non-international institutions, it is recommended that this value be set to N.</p> <p>The default is N.</p>
PROFILE_LAST_NAME	<p>Last name of the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>This value must always be set to Y.</p>

Option Type Code	Description
PROFILE_MI	<p>Middle initial of the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is V.</p>
PROFILE_NAME_PREFIX	<p>Prefix for the proxy, such as Dr., Ms., or Mr. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is V.</p>
PROFILE_NAME_SUFFIX	<p>Suffix for the proxy, such as Sr. or Jr. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is V.</p>
PROFILE_NATN_CODE	<p>Country code of the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is Y.</p>
PROFILE_OPT_OUT_ADV_IND	<p>Enables a proxy to opt out of the push to Advancement. Valid values are:</p> <p>Y - Data is required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is N.</p>

Option Type Code	Description
PROFILE_PHONE_AREA	<p>Area code for the proxy's phone number. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is N.</p>
PROFILE_PHONE_COUNTRY	<p>Country code for the proxy's phone number. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>For non-international institutions, it is recommended that this value be set to N.</p> <p>The default is N.</p>
PROFILE_PHONE_EXT	<p>Proxy's phone extension. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is V.</p>
PROFILE_PHONE_NUMBER	<p>Phone number for the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is V.</p>

Option Type Code	Description
PROFILE_PREF_FIRST_NAME	<p>Preferred first name for the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is V.</p>
PROFILE_REQUIRED	<p>Blocks display of proxy authorizations. Valid values are:</p> <p>Y - Block the display of proxy authorizations if any required profile data is missing.</p> <p>N - The display of proxy authorizations will not be blocked.</p> <p>The default is Y.</p>
PROFILE_SEX	<p>Gender of the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is V.</p>
PROFILE_SSN	<p>Social security number or taxpayer ID of the proxy. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>It is recommended that this value be set to N.</p> <p>The default is V.</p>
PROFILE_STAT_CODE	<p>State code for the proxy's address. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is Y.</p>

Option Type Code	Description
PROFILE_STREET_LINE1	<p>Street line number one of the proxy's address. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is Y.</p>
PROFILE_STREET_LINE2	<p>Street line number two of the proxy's address. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is V.</p>
PROFILE_STREET_LINE3	<p>Street line number three of the proxy's address. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>For non-international institutions, it is recommended that this value be set to N.</p> <p>The default is V.</p>
PROFILE_STREET_LINE4	<p>Street line number four of the proxy's address. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>For non-international institutions, it is recommended that this value be set to N.</p> <p>The default is N.</p>

Option Type Code	Description
PROFILE_SURNAME_PREFIX	<p>Surname prefix of the proxy that is used internationally to separate Mc or Mac for example into a separate field from the proxy's last name. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>For non-international institutions, it is recommended that this value be set to N.</p> <p>The default is N.</p>
PROFILE_ZIP	<p>Zip or postal code for the proxy's address. Valid values are:</p> <p>Y - Data is required.</p> <p>V - Data is visible and may be entered, but is not required.</p> <p>N - Data is not displayed on the profile page.</p> <p>The default is Y.</p>

Data Load options

The following data load options may be specified:

Option Type Code	Description
ADV_LOAD_ATYP_CODE_GEOR	If the student doesn't have an address that matches this code, an error will be generated. The error is only generated in the Advancement load.
ADV_LOAD_ATYP_CODE_PREF	If the student doesn't have an address that matches this code, an error will be generated. The error is only generated in the Advancement load.
ADV_LOAD_COLL_CODE_PREF	Default value to use for the Advancement preferred college code as defined in STVCOLL.

Option Type Code	Description
ADV_LOAD_DONOR_CODE	Default value to use for the Advancement donor category as defined in ATVDONR. This value is usually overridden at the relationship level.
ADV_LOAD_PREF_CLASS	Default four digit year to use for the Advancement preferred class year.
ADV_LOAD_XREF_CODE	Default value to use for the Advancement relationship cross reference code as defined in ATVXREF. This value is usually overridden at the relationship level.
LOAD_ADDRESS_SOURCE	Default value to use for the address source for information entered by the proxy during initial authentication as defined in STVASRC.
LOAD_ADDRESS_TYPE	Default value to use for the address type for information entered by the proxy during initial authentication as defined in STVATYP.
LOAD_EMAIL_TYPE	Default value to use for the e-mail type for information entered by the proxy during initial authentication as defined in GTVEMAL.
LOAD_PHONE_TYPE	Default value to use for the phone type for information entered by the proxy during initial authentication as defined in STVTELE.

Miscellaneous options

The following miscellaneous options may be specified:

Option Type Code	Description
ACCESS_WINDOW_DAYS	Default number of days that a proxy is allowed access. The default is 365.
ACTION_VALID_DAYS	Default number of days that an action link is active for a new proxy, pin reset, or e-mail change. The default is 5.

Option Type Code	Description
DEBUG_EMAIL	<p>Debug e-mail for testing. Valid values are:</p> <p>N - Send e-mail.</p> <p>Y - View e-mail, but do not send.</p> <p>I - View and send e-mail.</p> <p>The default is N.</p>
DEBUG_GORSRIN	<p>Debug the push process for testing. Valid values are:</p> <p>0 No log will be created.</p> <p>1 A log file with minimal detail will be created.</p> <p>2 A log file with more detail will be created.</p> <p>3 A log file with the most detail will be created.</p> <p>The default is 3.</p>
DELETE_HISTORY	<p>Delete history when Global Proxy Access is removed. Valid values are:</p> <p>Y History will be deleted when Global Proxy Access is removed.</p> <p>N History will not be deleted when Global Proxy Access is removed.</p> <p>The default is N.</p> <p>This option is only relevant with a System Code of PROXY_GLOBAL_ACCESS.</p>
ENABLE_DELETE_AFTER_DAYS	<p>Default number of days delete is enabled after proxy last views page.</p> <p>The default is 99999.</p>
ENABLE_DELETE_RELATIONSHIP	<p>Enable the ability to delete a proxy relationship in Self-Service Banner. Valid values are:</p> <p>Y - Delete Relationship functionality will be available.</p> <p>N - Delete Relationship functionality will not be available.</p> <p>The default is Y.</p>

Option Type Code	Description
ENABLE_PASSPHRASE	<p>Enable the passphrase functionality in Self-Service Banner. Valid values are:</p> <p>Y - Passphrase will be available and the Passphrase field and Send Passphrase button will be available.</p> <p>N - Passphrase will not be available.</p> <p>The default is Y.</p>
ENABLE_RESET_PIN	<p>Enable the reset pin functionality Self-Service Banner. Valid values are:</p> <p>Y - The ability to reset a pin is available and the Reset Pin button will be available.</p> <p>N - The ability to reset a pin will not be available.</p> <p>The default is Y.</p>
ENABLE_TAB_COMMUNICATION	<p>Display the Proxy Management Communication tab Self-Service Banner. Valid values are:</p> <p>Y - The Proxy Management Communication tab will be displayed.</p> <p>N - The Proxy Management Communication tab will not be displayed.</p> <p>The default is Y.</p>
ENABLE_TAB_HISTORY	<p>Display the Proxy Management History tab Self-Service Banner. Valid values are:</p> <p>Y - The Proxy Management History tab will be displayed.</p> <p>N - The Proxy Management History tab will not be displayed.</p> <p>The default is Y.</p>
MAX_INVALID_LOGINS	<p>The maximum number of invalid login attempts before the e-mail address will be disabled.</p> <p>The default is 3.</p>

Option Type Code	Description
PAGE_LEVEL_AUTHORIZATION	<p>Enable the Page Level Authorization checkbox. Valid values are:</p> <p>Y - The Page Level Authorization checkbox is available.</p> <p>N - The Page Level Authorization checkbox will not be available.</p> <p>The default is Y.</p> <p>For more on page level authorizations, please see "Display of pages" on page 46.</p>
PIN_LENGTH_MINIMUM	<p>Minimum PIN length for proxies if PIN_VALIDATION_VIA_GUAPPRF is set to N.</p> <p>The default is 8.</p>
PIN_LIFETIME_DAYS	<p>Default number of days until the PIN expires.</p> <p>The default is 365.</p>
PIN_VALIDATION_VIA_GUAPPRF	<p>Use GUAPPRF for Proxy Pins. Valid values are:</p> <p>Y - Rules for pin length, numeric required in pin, and character required in pin will be based on the rules established on the GUAPPRF form instead of only relying upon the PIN_LENGTH_MINIMUM option type code in GTVOTYP.</p> <p>N - The PIN_LENGTH_MINIMUM option type code in GTVOTYP will be used and no rules for numeric or character requirements will be used.</p> <p>The default is Y.</p>
PROXY_GIDM_PREFIX	<p>Single character to be used as a prefix to be used with the GIDM.</p> <p>The default is ? (question mark).</p>
VERIFY_CANCEL_EMAIL_ACTION	<p>Message to a previous e-mail address will contain a URL and action password that can be used to cancel an e-mail address change.</p> <p>Y - Enforce the use of an action password.</p> <p>The default is Y.</p>

Option Type Code	Description
VERIFY_NEW_EMAIL_ACTION	<p>Message to a new e-mail address will contain a URL and action password used to confirm an e-mail address change.</p> <p>Y - Enforce the use of an action password.</p> <p>The default is Y.</p>
VERIFY_NEW_PROXY_ACTION	<p>Message to a new proxy will contain a URL and action password used to update the proxy PIN value.</p> <p>Y - Enforce the use of an action password.</p> <p>The default is Y.</p>
VERIFY_PIN_RESET_ACTION	<p>Message to a proxy about a pin reset will contain a URL and action password used to update proxy PIN value.</p> <p>Y - Enforce the use of an action password.</p> <p>The default is Y.</p>

Web Tailor Configuration

The pages that a Banner person can authorize are controlled by configuration within Web Tailor. This configuration must be performed for each relationship type that your institution has decided upon. The naming standard for the menu(s), where the relationship type is defined on GTVRETP, are as follows:

`PROXY_ACCESS_RELATIONSHIPCODE_OptionalSortParameter`



Note: The PROXY_ACCESS and the RELATIONSHIPCODE (PARENT or ADVISOR) must be uppercase, however, the OptionalSortParameter has no case requirement. Application Server

For example:

- `PROXY_ACCESS_PARENT_Slist`
- `PROXY_ACCESS_PARENT_Glist`
- `PROXY_ACCESS_ADVISOR`

In the above example, the first two menus will both be available for proxies of type PARENT of the Banner person.

Any Web page can be set up as a Proxy Access page, as long as it calls the `twbkwbis.F_ValidUser` function to validate the user.



Note: This includes local pages as well as baseline pages.

For more information on setting up a menu, please see steps 6 and 7 in [“Global Proxy Access” on page 75](#).

Display of pages

Pages will be displayed to the Banner person in the order determined primarily by the menu description and secondarily by the sequence number within the menu. If a page is in multiple menus, it will only be displayed once in the list, in the first menu in which it is displayed.

One of the configuration options that should be set is whether to allow authorizations to be performed on individual pages or only at a menu level. You can force a menu of pages to be authorized as a unit if the `PAGE_LEVEL_AUTHORIZATION` option is set to N on GTVOTYP. Depending on this configuration, check boxes next to the list of pages may or may not be updated. The check boxes act as a toggle, whether at the menu level or at the individual page level, switching between authorized and not authorized.

Your institution may want to have multiple menus for a relationship type for the following reasons:

- To allow the Banner person to authorize/un-authorize a group of pages at a single time.
- To group similar pages together, both for the Banner person and for the proxy.

Please note the following:



Warning! *It is highly recommended that you do not make any Update pages available to proxies. Please limit proxy access to only Inquiry pages*

- If a new page is added to a menu through Web Tailor, it will appear in all the displays for the appropriate proxies, but it will be unauthorized. Banner persons wishing to authorize this page will need to use Self-Service Banner to perform the authorization, so this should be kept in mind when communicating changes to your users.
- If a menu is authorized, only those pages currently displayed will be authorized. Therefore, if a page is defined for two menus, it will only be included in the menu-level authorization for the first displayed menu.
- The check box at the menu will be checked if all the displayed pages are authorized. If a page is in the menu but is not displayed in the list because it was removed from the display list because it was duplicated, it will not matter if it is authorized or not when determining whether the whole group of pages has been authorized.
- If a page is removed from a menu through Web Tailor, it will disappear from that menu's list, but may appear in another menu. If so, any authorization will stay with the page.
- If a menu is removed through Web Tailor, the pages that had been under it may appear in other menus, with their authorizations. If a page from the removed menu does not appear in any other menu, it will not display and the Banner person will not be able to adjust the authorizations.

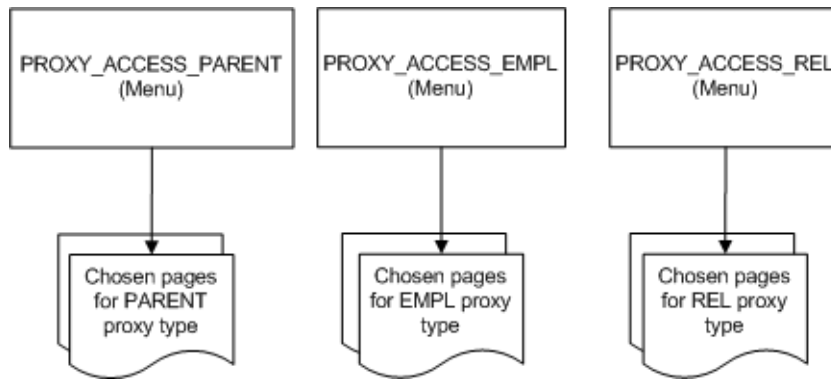


Note: Pages defined as Admin Secured in Web Tailor should not be proxied since these pages use FGAC (Fine Grained Access Control) and require an Oracle account which the proxy users will not have.

Examples

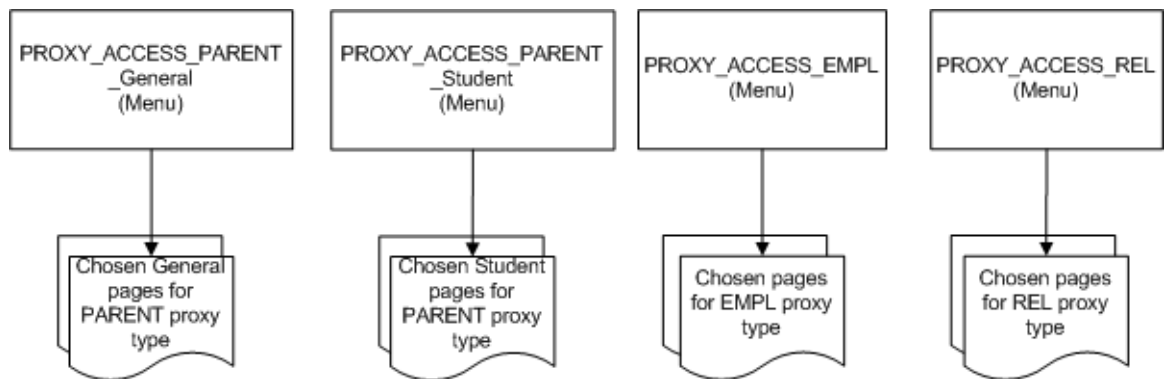
If an institution has the following relationships defined, a simple menu structure would be:

- PARENT - parent
- EMPL - employer
- REL - relative



In the example above, there is one menu for each relationship type and pages display strictly in sequence number order.

If the institution wanted to categorize pages within one, or more, of the menus, the menu structure might resemble the following:



In the above example, Banner persons authorizing PARENT proxies would get the list of pages for both PROXY_ACCESS_PARENT_General and PROXY_ACCESS_PARENT_Student to choose from.

Continuing with this example, the following pages are associated with these two menus:

- PROXY_ACCESS_PARENT_General has the following pages:
 - View holds
 - Display email
 - Display emergency contacts
- PROXY_ACCESS_PARENT_Student has the following pages:
 - Registration eligibility
 - Student schedule – concise
 - View holds

When the Banner person and the PARENT proxy see the list of eligible pages, the following pages will appear because View holds is a member of the General category:

- General
 - View holds
 - Display email
 - Display emergency contacts
- Student
 - Registration eligibility
 - Student schedule - concise



Note: There is no system limit on the number of menus that can be set up for a relationship type, nor for the number of pages within a menu.

In the example below, you can see that this institution set up the following four menus for this relationship type:

- Financial Aid
- General - the first group that includes Email Address
- General - the second group that includes Account Summary by Term
- Student

- Financial Aid Options**
 -
 - Status**
 - Award Messages**
 - Award History**
 - Award Package**
- General Options**
 -
 - Email Address**
 - Emergency Contacts**
 - Address and Phone**
 - Update Emergency Contacts**
 -
 - Account Summary by Term**
 - Account Summary Totals**
 - Tax Notification**
- Student Options**
 -
 - Academic Holds**
 - Academic Transcript**
 - Midterm Grades**
 - Final Grades**
 - Schedule by Day and Time**
 - Schedule with Course Detail**

Sample GORRSQL Rules

For sample GORRSQL rules, please refer the following sections of this appendix:



Note: Please See [“Proxy Access roles” on page 10](#) and [“Set SQL to implement rules” on page 15](#) for an overview of these roles. Typically these rules are updated by a DBA or technical resource with access to the GORRSQL form.



Note: Sample rules for these populations are not delivered as active, nor are they validated. Before the rules can be used at your institution, they must be analyzed, validated, and activated. Please ensure that you adapt these rules as necessary to conform to your institution’s policies.

To use these rules, you must ensure that the Web Tailor Parameter `ENABLE_GORRSQL_SSB_ROLES` is set to Y.

- [“Sample GORRSQL Rules to enable Proxy Access Processing” on page 51](#)
- [“Sample GORRSQL Rules to enable specific Proxy selections” on page 53](#)
- [“Sample GORRSQL Rules to enable Proxy Access via SSB Access” on page 55](#)
- [“Sample GORRSQL Rules to enable Global Proxy Access” on page 56](#)

Sample GORRSQL Rules to enable Proxy Access Processing

The following rules are provided as sample rules:

- Select SSB users who have signed off on FERPA as defined by a population selection
- Select SSB users who have the `WTAILORPROXYMGMT` role
- Select SSB users who have been coded within `TVRAUTH`
- Select SSB users who are members of a student cohort

These rules are defined on GORRSQL under the `SSB_ROLES` process and `SSB_ROLE_PROXYMGMT` rule.



Note: All rules must have a `SELECT` statement in the form:

```
SELECT CAST( 'TRUE' AS VARCHAR2(4) ) PROXYMGMT
```



Note: If multiple conditions exist one of the following rules, a person would need to only satisfy one of the conditions to be able to create a proxy.

Select SSB users who have signed off on FERPA as defined by a population selection

```
SELECT CAST('TRUE' AS VARCHAR2(4)) PROXYMGMT
FROM GLBEXTR
WHERE GLBEXTR_APPLICATION = 'GENERAL'
AND GLBEXTR_SELECTION = 'PROXY_ACCESS_FERPA'
AND GLBEXTR_CREATOR_ID = 'BASELINE'
AND GLBEXTR_USER_ID = 'BASELINE'
AND GLBEXTR_KEY=:PIDM
AND EXISTS (SELECT 1
            FROM TWGBPARM
            WHERE TWGBPARM_PARAM_VALUE = 'Y'
            AND TWGBPARM_PARAM_NAME = 'PROXYMGMT_ROLE_ENABLED')
AND EXISTS (SELECT 1
            FROM GOBTPAC
            WHERE GOBTPAC_PIN_DISABLED_IND != 'Y'
            AND GOBTPAC_PIDM = :PIDM)
```

Select SSB users who have the WTAILORPROXYMGMT role

This can be used to manually assign the PROXYMGMT role since PROXYMGMT is under system control, whereas WTAILORPROXYMGMT can be manually assigned.

```
SELECT CAST('TRUE' AS VARCHAR2(4)) PROXYMGMT
FROM TWGRROLE
WHERE TWGRROLE_ROLE = 'WTAILORPROXYMGMT'
AND TWGRROLE_PIDM = :PIDM
```

Select SSB users who have been coded within TVRAUTH

This example shows how you can query a Banner table, TVRAUTH for example, for a code that signals that the student has provided FERPA permission generically. The specific code to check for is stored in GTVSDAX.

```
SELECT CAST('TRUE' AS VARCHAR2(4)) PROXYMGMT
```

```

FROM TVRAUTH
WHERE TVRAUTH_TYPE_CODE IN (SELECT GTVSDAX_EXTERNAL_CODE
                             FROM GTVSDAX
                             WHERE GTVSDAX_INTERNAL_CODE_GROUP =
'PROXY_ACCESS'
                             AND GTVSDAX_INTERNAL_CODE = 'TVRAUTH')
AND TVRAUTH_START_DATE <= SYSDATE
AND TVRAUTH_END_DATE >= SYSDATE
AND TVRAUTH_PIDM = :PIDM
AND TVRAUTH_STATUS = :A'
AND EXISTS (SELECT 1
            FROM TWGBPARM
            WHERE TWGBPARM_PARAM_VALUE = 'Y'
              AND TWGBPARM_PARAM_NAME = 'PROXYMGMT_ROLE_ENABLED')
AND EXISTS (SELECT 1
            FROM GOBTPAC
            WHERE GOBTPAC_PIN_DISABLED_IND != 'Y'
              AND GOBTPAC_PIDM = :PIDM)

```

Select SSB users who are students

This example returns anyone who is a student.

```

SELECT CAST('TRUE' AS VARCHAR2(4)) PROXYMGMT
FROM GOVROLE
WHERE GOVROLE_STUDENT_IND = 'Y'
AND GOVROLE_PIDM = :PIDM

```

Sample GORRSQL Rules to enable specific Proxy selections

The following rules are provided as sample rules:

- SSB users who have an Advancement cross-reference to this person
- SSB users who are the primary advisor

These rules are defined on GORRSQL under the PROXY_ACCESS process and PROXYMGMT_ADD_LIST rule.



Note: Sample rules for these populations are not delivered as active, nor are they validated. Before the rules can be used at your institution, they must be analyzed, validated, and activated.

All rules must have a SELECT that returns a unique PIDM and e-mail address.

SSB users who have an Advancement cross-reference to this person

This rule will find for the person who is in Proxy Management all Advancement cross-references who are not already serving as a proxy for the person as long as the potential proxy has an active preferred e-mail address.

```
SELECT DISTINCT GOREMAL_PIDM PIDM,
               TRIM(LOWER(GOREMAL_EMAIL_ADDRESS)) EMAIL
FROM APRXREF,
     GOREMAL
WHERE NOT EXISTS (SELECT 1
                  FROM GPRXREF,
                       GPBPRXY
                  WHERE GPBPRXY_EMAIL_ADDRESS =
TRIM(LOWER(GOREMAL_EMAIL_ADDRESS))
                    AND GPBPRXY_PROXY_IDM      = GPRXREF_PROXY_IDM
                    AND GPRXREF_PERSON_PIDM     = :PIDM)
AND GOREMAL_STATUS_IND      = 'A'
AND GOREMAL_PREFERRED_IND   = 'Y'
AND GOREMAL_PIDM           = APRXREF_XREF_PIDM
AND APRXREF_PIDM           = :PIDM
```

SSB users who are the primary advisor

This rule will find for the person who is in Proxy Management all primary advisors of type 'A' who are not already serving as a proxy for the person

```
SELECT DISTINCT GOREMAL_PIDM PIDM,
               TRIM(LOWER(GOREMAL_EMAIL_ADDRESS)) EMAIL
FROM SGRADVR,
     GOREMAL
WHERE NOT EXISTS (SELECT 1
                  FROM GPRXREF,
                       GPBPRXY
                  WHERE GPBPRXY_EMAIL_ADDRESS =
TRIM(LOWER(GOREMAL_EMAIL_ADDRESS))
                    AND GPBPRXY_PROXY_IDM      = GPRXREF_PROXY_IDM
                    AND GPRXREF_PERSON_PIDM     = :PIDM)
AND GOREMAL_STATUS_IND      = 'A'
AND GOREMAL_PREFERRED_IND   = 'Y'
```

```

AND GOREMAL_PIDM                = SGRADVR_ADVR_PIDM
AND NVL( SGRADVR_ADVR_CODE , 'N' ) = 'A'
AND NVL( SGRADVR_PRIM_IND , 'N' ) = 'Y'
AND SGRADVR_PIDM                = :PIDM

```

Sample GORRSQL Rules to enable Proxy Access via SSB Access

The following rules are provided as sample rules:

- If a PIDM is part of a population selection
- SSB users who have WTAILORPROXYACCESS role (staff testing)
- SSB users who have an active proxy relationship

These rules are defined on GORRSQL under the SSB_ROLES process and SSB_ROLE_PROXYACCESS rule.



Note: Sample rules for these populations are not delivered as active, nor are they validated. Before the rules can be used at your institution, they must be analyzed, validated, and activated.

To use these rules, you must ensure that the Web Tailor Parameter ENABLE_GORRSQL_SSB_ROLES is set to Y.



Note: All rules must have a SELECT statement in the form:

```
SELECT CAST( 'TRUE' AS VARCHAR2(4) ) PROXYACCESS
```

If a PIDM is part of a population selection

This example assumes that students who have complete the FERPA requirements will be added to a population selection.

```

SELECT CAST( 'TRUE' AS VARCHAR2(4) ) PROXYACCESS
FROM GLBEXTR
WHERE GLBEXTR_APPLICATION = 'GENERAL'
AND GLBEXTR_SELECTION = 'PROXY_ACCESS_FERPA'
AND GLBEXTR_CREATOR_ID = 'BASELINE'
AND GLBEXTR_USER_ID = 'BASELINE'
AND GLBEXTR_KEY=:PIDM
AND EXISTS (SELECT 1
            FROM TWGBPARM

```

```

WHERE TWGBPARAM_PARAM_VALUE = 'Y'
      AND TWGBPARAM_PARAM_NAME = 'PROXYACCESS_ROLE_ENABLED')
AND EXISTS (SELECT 1
            FROM GOBTAC
            WHERE GOBTAC_PIN_DISABLED_IND != 'Y'
                  AND GOBTAC_PIDM = :PIDM)

```

SSB users who have WTAILORPROXYACCESS role

This rule will allow any SSB user with the WTAILORPROXYACCESS role to manage proxies.



Note: This would be useful for staff testing.

```

SELECT CAST('TRUE' AS VARCHAR2(4)) PROXYACCESS
FROM TWGRROLE
WHERE TWGRROLE_ROLE = 'WTAILORPROXYACCESS'
      AND TWGRROLE_PIDM = :PIDM

```

SSB users who have an active proxy relationship

This rule will allow any SSB user who is a proxy to use the proxy pages from within SSB and not force access through the special DAD.

```

SELECT CAST('TRUE' AS VARCHAR2(4)) PROXYACCESS
FROM GPBPRXY
WHERE EXISTS (SELECT 1 FROM GPRXREF WHERE TRUNC(SYSDATE) BETWEEN
TRUNC(GPRXREF_START_DATE) AND TRUNC(GPRXREF_STOP_DATE) AND
GPRXREF_PROXY_IDM = GPBPRXY_PROXY_IDM)
      AND GPBPRXY_PROXY_PIDM = :PIDM

```

Sample GORRSQL Rules to enable Global Proxy Access

The following rules are provided as sample rules:

- Requires that a PIDM has a PROXY_ACCESS_FERPA population record
- Requires that a PIDM has a STUDENT SSB role
- Any PIDM with an active GOBTAC record can be selected by a Global Proxy Access User

These rules are defined on GORRSQL under the SSB_ROLES process and SSB_ROLE_PROXYTARGET rule.



Note: Sample rules for these populations are not delivered as active, nor are they validated. Before the rules can be used at your institution, they must be analyzed, validated, and activated.

To use these rules, you must ensure that the Web Tailor Parameter ENABLE_GORRSQL_SSB_ROLES is set to Y.



Note: All rules must have a SELECT statement in the form:

```
SELECT CAST( 'TRUE' AS VARCHAR2(4) ) PROXYMGMT
```



Note: If multiple conditions exist one of the following rules, a person would need to only satisfy one of the conditions to be able to create a proxy.

Requires that a PIDM has a PROXY_ACCESS_FERPA population record

This example requires that a PIDM must have a FERPA population record to be proxied by a Global Proxy Access user.

```
SELECT CAST( 'TRUE' AS VARCHAR2(4) ) PROXYTARGET
FROM GLBEXTR
WHERE GLBEXTR_APPLICATION = 'GENERAL'
AND GLBEXTR_SELECTION = 'PROXY_ACCESS_FERPA'
AND GLBEXTR_CREATOR_ID = 'BASELINE'
AND GLBEXTR_USER_ID = 'BASELINE'
AND GLBEXTR_KEY=:PIDM
AND EXISTS (SELECT 1
            FROM TWGBPARM
            WHERE TWGBPARM_PARAM_VALUE = 'Y'
              AND TWGBPARM_PARAM_NAME = 'PROXYMGMT_ROLE_ENABLED')
AND EXISTS (SELECT 1
            FROM GOBT PAC
            WHERE GOBT PAC_PIN_DISABLED_IND != 'Y'
              AND GOBT PAC_PIDM = :PIDM)
```

Requires that a PIDM has a STUDENT SSB role

This example requires that a PIDM must have a STUDENT SSB role to be proxied by a Global Proxy Access user.

```
SELECT CAST('TRUE' AS VARCHAR2(4)) PROXYTARGET
FROM TWGRROLE
WHERE TWGRROLE_ROLE = 'STUDENT'
AND TWGRROLE_PIDM = :PIDM
```

Any PIDM with an active GOBPAC record can be selected by a Global Proxy Access User

This example allows any PIDM with an active GOBPAC record to be proxied by a Global Proxy Access user.

```
SELECT CAST('TRUE' AS VARCHAR2(4)) PROXYTARGET
FROM DUAL
WHERE EXISTS (SELECT 'Y' FROM GOBPAC
              WHERE GOBPAC_PIDM = :PIDM
                 AND GOBPAC_PIN_DISABLED_IND = 'N'
                 AND NVL(GOBTPAC_PIN_EXP_DATE,SYSDATE+1) >
TRUNC(SYSDATE))
```

Information Text in Web Tailor

The following Proxy Access Information Text may be customized in Web Tailor:

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkprxy.P_GlobalProxyAccess	1	NODATA	web_stop	Global proxy access requires you to have an active preferred e-mail address.
bwgkprxy.P_ManageProxy	1	BADEMAIL	web_stop	The "E-mail addresses must have at least 1 character in front of "@" and at least 1 character after "@" before.
bwgkprxy.P_ManageProxy	1	EMAILINUSE	web_stop	The e-mail address has already been used by a different proxy and therefore the proxy has not been added.
bwgkprxy.P_ManageProxy	1	GROUP_MENU		Check to Select or Deselect ALL items below.
bwgkprxy.P_ManageProxy	1	NOEMAILMATCH	web_stop	The "E-mail address" and "Verify E-mail address" must match to add a proxy.
bwgkprxy.P_ManageProxy	1	PROXYADDED	web_success	A new proxy has been successfully added.
bwgkprxy.P_ManageProxy	1	REQUIRED	web_success	To create a Proxy, you must specify an email address, first and last name.
bwgkprxy.P_ProxyAccess	1	NODATA	web_stop	Proxy access requires you to have an active preferred email address, first and last name.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkprxy.P_ProxyAccess	1	HEADER		<p style="font-size:15px">***You are viewing <VALUE1**>'s information***</p>
bwgkprxy.P_ProxyLogin	1	CANCEL_EMAIL	web_success	Your request to change e-mail address has been cancelled and your previous e-mail address has been validated.
bwgkprxy.P_ProxyLogin	1	DEFAULT	web_info	Enter the e-mail address that was registered as a Banner Web proxy. Then enter the PIN that you previously defined.
bwgkprxy.P_ProxyLogin	1	DISABLEDPIN	web_stop	Your PIN has been disabled; you should have an email with directions telling you how to re-enable your PIN.
bwgkprxy.P_ProxyLogin	1	EMAIL_DUPLICATE	web_caution	The new e-mail address that you used when you updated your proxy profile is already in use by another proxy. No action taken.
bwgkprxy.P_ProxyLogin	1	EXPIREDPIN	web_stop	Your PIN has expired. Use the "Forgot PIN" button to request a new one.
bwgkprxy.P_ProxyLogin	1	INVALIDPIN	web_redflag	Either the e-mail address or PIN you have entered is not valid. Please retype.
bwgkprxy.P_ProxyLogin	1	INVALIDPROXY	web_redflag	Either the e-mail address or PIN you have entered is not valid. Please retype.
bwgkprxy.P_ProxyLogin	1	NEW_EMAIL	web_success	Your updated email address is now in effect. Use your existing PIN credentials.
bwgkprxy.P_ProxyLogin	1	TIMEOUT	web_redflag	Your session has timed out due to more than <VALUE1**> minutes of inactivity.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkprxy.P_ProxyLogin	2	DEFAULT		<p>Banner Web users can register any e-mail address as a proxy and can then enable individual proxy access to selected Banner Web pages. All Banner Web pages are personal and confidential.</p> <p>The proxy PIN should never be shared. If you suspect that someone else may know your proxy credentials, enter your e-mail address and then reset your PIN using the Forgot PIN or Reset PIN button.</p>
bwgkpxya.P_PA_ActionVerify	1	DEFAULT	web_info	<p>The e-mail you received contained an Action Link (which you have used to get here) and an Action Password used to verify that you are the intended recipient.</p> <p>You will also use this value as the “Old Pin” on the following page when establishing your new pin.</p>
bwgkpxya.P_PA_ForgotPin	1	DEFAULT	web_info	<p>A web page link has been sent to your e-mail address. Use the link to reset your PIN.</p>
bwgkpxya.P_PA_GlobalProxyAccess	1	ADDED	web_success	<p>A new proxy has been added. The proxy is only active for one day. Please remember to delete when processing is complete.</p>

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxya.P_PA_GlobalProxyAccess	1	DEFAULT	web_info	<p>Use the Add tab to populate your proxy tabs. Select a named tab to enter PROXY MODE.</p> <p>You will then see a list of links for pages available for that user based on the relationship you selected.</p> <p>While in PROXY MODE the links and tabs above will be disabled. Select the Add tab (or close your browser) to exit proxy mode.</p> <p>When you activate a link, the focus will change to another browser window dedicated to proxy display. The window title and page content (including links) are only valid for the selected user.</p> <p>It is suggested that you remove your proxy relationships when finished by selecting the delete icon on each proxy tab.</p>
bwgkpxya.P_PA_GlobalProxyAccess	1	DELGLOBAL	web_success	The proxy delete was successful.
bwgkpxya.P_PA_GlobalProxyAccess	1	DISABLED	web_stop	Verify that <*<VALUE1*> are enabled before continuing.
bwgkpxya.P_PA_GlobalProxyAccess	1	NOPERSON	web_stop	You must enter a valid “Banner ID” before continuing
bwgkpxya.P_PA_GlobalProxyAccess	1	NORETP	web_stop	You must select a “Relationship” before continuing.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxya.P_PA_GlobalProxyAccess	1	RESETPROXY	web_stop	The operation you requested was not possible in Proxy mode. Proxy mode has been reset, please submit your request again.
bwgkpxya.P_PA_Login	1	INVALIDPIN	web_required	The password you submitted is not correct for that proxy. Please retype.
bwgkpxya.P_PA_Login	1	INVALIDPROXY	web_required	The e-mail address you submitted does not belong to a registered Banner Web proxy. Please retype.
bwgkpxya.P_PA_ProxyAccess	1	DEFAULT	web_info	<p>You will see a tab for each Banner Web user who has authorized pages for you to access. Select a named tab to enter PROXY MODE.</p> <p>You will then see a list of links for pages authorized by that user.</p> <p>While in PROXY MODE the links and tabs above will be disabled. Select the Profile tab (or close your browser) to exit proxy mode.</p> <p>When you activate a link, the focus will change to another browser window dedicated to proxy display. The window title and page content (including links) are only valid for the selected user.</p>
bwgkpxya.P_PA_ProxyAccess	1	EMAIL_DUPLICATE	web_caution	Changes have been saved except for the requested change of e-mail address. The new e-mail address is in use by another proxy account.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxya.P_PA_ProxyAccess	1	NEW_EMAIL	web_stop	<p>Changes have been saved -- including a request to change e-mail address. Two e-mail messages have been sent.</p> <p>The first message was sent to the old e-mail address allowing you to cancel the change. The second message was sent to the new e-mail address allowing you to validate the change.</p> <p>You will not be able to login to this proxy account until the link contained in one of the messages is executed.</p>
bwgkpxya.P_PA_ProxyAccess	1	NO_EMAIL_LETTERS	web_stop	No e-mail letters were defined for this process (**VALUE1**). Please contact the administration office for additional information.
bwgkpxya.P_PA_ProxyAccess	1	NO_STUDENT	web_stop	The STUDENT application has not been installed. This process cannot be completed. Please contact the administration office for additional information.
bwgkpxya.P_PA_ProxyAccess	1	REQUIRED	web_caution	Changes have been saved but some required data is missing.
bwgkpxya.P_PA_ProxyAccess	1	SAVED	web_success	Changes have been saved.
bwgkpxya.P_PA_ResetPin	1	DEFAULT	web_info	Enter your new PIN twice. A PIN can be a number, password or passphrase. For higher security, use a combination of uppercase letters, lowercase letters and numbers.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxya.P_PA_ResetPin	1	ERR_GUAPPRF	web_redflag	Failed Validation: < **VALUE1** >
bwgkpxya.P_PA_ResetPin	1	ERR_NOMATCH	web_redflag	The new PIN value and the validate PIN value must match. Please retype.
bwgkpxya.P_PA_ResetPin	1	ERR_TOOSHORT	web_redflag	The new PIN value you entered did not meet the minimum length requirements. Please retype.
bwgkpxya.P_PA_ResetPin	1	ERR_USER	web_redflag	Invalid e-mail or Old PIN. Please retype.
bwgkpxya.P_PA_ResetPin	1	GUAPPRF_MINMAX	web_info	Minimum PIN length: < **VALUE1** > Maximum PIN length: < **VALUE2** >.
bwgkpxya.P_PA_ResetPin	1	GUAPPRF_REQ_ALPHA	web_info	The PIN must contain at least one alphabetic character.
bwgkpxya.P_PA_ResetPin	1	GUAPPRF_REQ_NUM	web_info	The PIN must contain at least one numeric character.
bwgkpxya.P_PA_ResetPin	1	GUAPPRF_REQ_NUMALPHA	web_info	The PIN must contain at least one numeric character and at least one alphabetic character.
bwgkpxya.P_PA_ResetPin	1	NEW_PROXY	web_success	Welcome to the Banner Web proxy access system. Your e-mail address has been verified.
bwgkpxya.P_PA_ResetPin	1	PIN_LENGTH_MINIMUM	web_info	Minimum PIN length: < **VALUE1** >.
bwgkpxya.P_PA_ResetPin	2	NEW_PROXY		The next step is to save your security PIN for proxy access.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxya.P_PA_ShowAuth	1	DEFAULT	web_info	The following Banner Web page links have been specifically authorized for your use. All pages will display in a dedicated Proxy Access window. Use the EXIT link to close the Proxy Access window. There is no need to close the window until you have completed all proxy access.
bwgkpxya.P_PA_ShowAuth	1	NOAUTH	web_stop	No pages have been authorized.
bwgkpxya.P_PA_ShowAuth	1	PARENT		We appreciate your effort to be a good parent.
bwgkpxya.P_PA_ShowProfile	1	DEFAULT	web_info	Please keep your Banner Web proxy information up-to-date.
bwgkpxya.P_PA_ShowSelector	1	DEFAULT	web_info	Input Banner ID and relationship for person you would like to proxy for.
bwgkpxym.P_MP_Add	1	ACCESS_ADD		Or add a proxy from the list of existing Banner relationships below.
bwgkpxym.P_MP_Add	1	DEFAULT	web_info	Add a new proxy using the form below. Then edit their profile and authorization settings to enable appropriate access.
bwgkpxym.P_MP_CloneAuth	1	DEFAULT	web_success	Authorization settings have been copied. The display will refresh in a few seconds.
bwgkpxym.P_MP_EmailPassphrase	1	DEFAULT	web_success	E-mail message with passphrase has been sent to proxy.
bwgkpxym.P_MP_EmailPassphrase	1	NOTACTIVE	web_stop	A relationship must be selected and a passphrase entered.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxym.P_MP_EmailPassphrase	1	NOXREF	web_redflag	No relationship record was found. Contact the Help Desk.
bwgkpxym.P_MP_Expand	1	NOPROXY	web_redflag	Please notify the Help Desk that there is a database issue concerning your proxy access settings.
bwgkpxym.P_MP_GrantOne	1	DEFAULT	web_success	One time only access has been granted.
bwgkpxym.P_MP_GrantOne	1	NOTACTIVE	web_stop	You must update the proxy relationship and approve at least one page before granting one-time-access.
bwgkpxym.P_MP_List	1	DEFAULT	web_info	Expand a proxy to define relationship type, begin and end dates, and authorizations.
bwgkpxym.P_MP_List	1	EMPTY	web_redflag	Your proxy list is empty.
bwgkpxym.P_MP_ProxyInfo	1	NEWEMAIL	web_caution	This proxy account is disabled pending e-mail change verification.
bwgkpxym.P_MP_ProxyInfo	1	PINDISABLED	web_stop	The proxy PIN is disabled.
bwgkpxym.P_MP_ProxyInfo	1	PINRESET	web_caution	Your proxy has requested a PIN reset.
bwgkpxym.P_MP_ProxyInfo	1	UNVERIFIED	web_caution	Your proxy has not verified their email address.
bwgkpxym.P_MP_ResendEmail	1	DEFAULT	web_success	E-mail message has been resent to proxy.
bwgkpxym.P_MP_ResendEmail	1	NOTACTIVE	web_redflag	Your message was resent to a proxy whose profile or authorizations are not currently active.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxym.P_MP_ResetPin	1	DEFAULT	web_success	You have requested a PIN reset for this proxy; a reset pin message has been sent to the proxy.
bwgkpxym.P_MP_ResetPin	1	NOTACTIVE	web_stop	You must update the proxy relationship and approve at least one page before a PIN reset is allowed.
bwgkpxym.P_MP_SendAuthEmail	1	DEFAULT	web_success	An email message has been sent to the proxy with the current authorized page list.
bwgkpxym.P_MP_ShowAuth	1	DEFAULT		Select the information pages your proxy should be able to access. Once authorized, your proxy will be able to view and/or update these pages when they log in.
bwgkpxym.P_MP_ShowAuth	1	NOAUTH	web_caution	Authorization record(s) are missing or unavailable at this time. The most probable cause is that no pages have been enabled for the proxy relationship selected. Please contact the Help Desk.
bwgkpxym.P_MP_ShowAuth	1	PARENT		Special authorization tab information text dealing with parents.
bwgkpxym.P_MP_ShowComm	1	DEFAULT		Action date is when the proxy activated the URL within the message. Expiration date is when the URL within the message will last be active.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxym.P_MP_ShowComm	1	NOCOMM	web_caution	Communication record(s) are missing or unavailable at this time. The most probable cause is that you have not taken any action that would send an e-mail to this proxy.
bwgkpxym.P_MP_ShowComm	1	PARENT		Special communication tab information text dealing with parents.
bwgkpxym.P_MP_ShowHistory	1	DEFAULT		This list is the history of your authorizations for this proxy (newest to oldest).
bwgkpxym.P_MP_ShowHistory	1	NOHIST	web_caution	History record(s) are missing or unavailable at this time. The most probable cause is that you have not made any authorization changes for this proxy.
bwgkpxym.P_MP_ShowHistory	1	PARENT		Special history tab information text dealing with parents.

NAME	SEQUENCE	LABEL	IMAGE	TEXT
bwgkpxym.P_MP_ShowProfile	1	DEFAULT		<p>Please select your relationship with this proxy.</p> <p>The list of pages available to the proxy is based on relationship type.</p> <p>The description field is your personal note about this proxy (dad, mom, soccer coach, company name).</p> <p>The passphrase can be used to determine FERPA identity for phone calls or other off-line queries by this proxy.</p> <p>You must communicate the passphrase to your proxy. You can control the start and end dates for proxy access below.</p>
bwgkpxym.P_MP_ShowProfile	1	NOXREF	web_stop	The proxy relationship record is missing or unavailable at this time. Please contact the Help Desk.
bwgkpxym.P_MP_ShowProfile	1	PARENT		Special profile tab information text dealing with parents.

Push Processing

The batch and Internet Native Banner push process uses the data types identified on the GTVDTYP form and the information on the Data Load tab on the GERPRXY form to determine the data to be pushed.



Note: This is specified for a relationship type.

Code	Description	System Required	Ind	Create User	Create Date	User ID	Activity Date
PERSON	Banner General	<input type="checkbox"/>		BASELINE	14-SEP-2011	BASELINE	14-SEP-2011
	Processing Sequence: 1			Package.Function: GORSRIN.F_PROCESS_PERSON			
PROXY	Banner Web Proxy Access	<input checked="" type="checkbox"/>		BASELINE	14-SEP-2011	BASELINE	14-SEP-2011
	Processing Sequence: 2			Package.Function: GORSRIN.F_PROCESS_PROXY			
ADVANCEMENT	Banner Advancement	<input type="checkbox"/>		BASELINE	14-SEP-2011	BASELINE	14-SEP-2011
	Processing Sequence: 3			Package.Function: GORSRIN.F_PROCESS_ADVANCEMENT			
		<input type="checkbox"/>					
	Processing Sequence:			Package.Function:			
		<input type="checkbox"/>					
	Processing Sequence:			Package.Function:			
		<input type="checkbox"/>					
	Processing Sequence:			Package.Function:			
		<input type="checkbox"/>					
	Processing Sequence:			Package.Function:			



Note: Other systems using the Proxy Access functionality to load information from GENIDEN and GENBPSH should specify any data routines required for additional data to be loaded.

The following example shows that an institution that will be adding person and proxy information during the push process, but not adding Advancement data. Part of your analysis for enabling Proxy Access should be to determine what types of data to load for each relationship type. If the Proxy Access functionality is going to be used for other systems, a similar configuration should be done to control the data loaded during the push.

The screenshot shows the 'Proxy Access Data Option Rules' window. At the top, the 'System Code' is set to 'PROXY' and the description is 'Web for Proxy'. Below this, there are two tables.

Record Type	Description	Activity Date	User ID
ADVISOR	Academic Advisor	14-SEP-2011	BASELINE
COACH	Coach or NCAA Representative	14-SEP-2011	BASELINE
EMPLOYER	Employer or Hiring Agency	14-SEP-2011	BASELINE
PARENT	Parent or Legal Guardian	14-SEP-2011	BASELINE

Data Type	Load Activity Indicator	Description	Activity Date	User ID
ADVANCEMENT	N	Banner Advancement	05-OCT-2011	LVONHOLS
PERSON	Y	Banner General	14-SEP-2011	BASELINE
PROXY	Y	Banner Web Proxy Access	05-OCT-2011	LVONHOLS

On GERPRXY, the PARENT relationship within the PROXY system has three different types of data feeds that can be performed as part of the data push process. The PERSON and PROXY data types are set to Y to indicate that these data types would be loaded during the push process. The ADVANCEMENT data type is set to N indicating that even though it is an available option, it will not be loaded.

The first part of the push process, whether initiated from Internet Native Banner or via batch, is the common matching process. During this process, the data loaded is the data that is displayed on the GOAMTCH form which comes from Proxy Access.



Note: This data can be supplemented or overridden using the Internet Native Banner process.

Once the common matching process has loaded the data, the load process will continue checking the data type that needs to be processed.

The data will be processed in the order specified by the **Processing Sequence** on GTVDTYP and the process that actually loads the data is identified by the `package.function` in the **Package.Function** field on GTVDTYP.

When using the push process, the following rules must be followed:

- The `package.function` will be used as a user exit to perform specific logic to load data.
- The procedure must be designed to accept the following parameters:

```
GENBPSH_GIDM NUMBER(8),
GENBPSH_SYST_CODE VARCHAR2(30),
GENBPSH_RETP_CODE VARCHAR2(30),
GENBPSH_DTYP_CODE VARCHAR2(30)
```

and return a `VARCHAR2(500)` that will be NULL on a successful process or an error message if applicable.

The GORSRIN.F_PROCESS_PERSON will load the following data, or update the data if present and different from what has already been loaded:

- SPRIDEN
 - geniden_first_name
 - geniden_mi
 - geniden_last_name
 - geniden_surname_prefix
- SPBPERS
 - geniden_ssn
 - geniden_birth_date
 - geniden_sex
- GOREMAL
 - geniden_emal_code
 - geniden_email_address
- SPRADDR
 - geniden_house_number
 - geniden_street_line1
 - geniden_street_line2
 - geniden_street_line3
 - geniden_street_line4
 - geniden_city
 - geniden_stat_code
 - geniden_zip
 - geniden_natn_code
- SPRTELE
 - geniden_tele_code
 - geniden_phone_area
 - geniden_phone_number

The GORSRIN.F_PROCESS_PROXY will update gpbprxy _proxy_pidm with the PIDM of the user initiating the proxy.

The GORSRIN.F_PROCESS_ADVANCEMENT will make a dynamic call to GOKADVC.f_Ins_Advancement to create the apbcons and aprcatg records using ab_adv_individual.p_create.

In addition a call will be made to `apkldr.d.p_load_aprxref` to create the two way relationship between the proxy and the submitter.

Global Proxy Access

Global Proxy Access, if enabled, will allow authorized users to create a proxy for themselves for any current SPRIDEN ID.



Warning! *It is highly recommended that access be restricted to a controlled group of administrative users.*

Global Proxy Access setup

To setup Global Proxy Access, perform the following steps:

1. Access the GTVSYST form and create a new System type named `PROXY_GLOBAL_ACCESS`.
2. Access the GTVRETP form and create a new relationship type that will only be used by Global Proxy Access. For example, the new relationship type could be named `UNIV_ADMINISTRATION`.
3. Access the GTVOTYP form and select the `PROXY_GLOBAL_ACCESS` system code for the `DELETE_HISTORY` Option Type Code to indicated whether records related to Global Proxy Access will either be deleted or allowed to expire.

Global Proxy relationships will only display if the relationships are active, to improve usability, so the page will not become cluttered with all the proxies that may have been established over time. Once the global_proxy has made themselves a proxy, this will continue to display on the student's list of proxies forever as students are not able to remove proxies.

4. Access the GERPRXY form and select the `PROXY_GLOBAL_ACCESS` system code. On the next block, add the new relationship type that you created above to establish the relationship between `PROXY_GLOBAL_ACCESS` and the Relationship.

Typically there will be no data load or options associated with this relationship.

5. Access the Business Rules (GORRSQL) form, select the `SSB_ROLES` process and the `SSB_ROLE_PROXYTARGET` rule and click **Next Block**.

Determine what populations are eligible to be proxied by a Global Proxy Access user.



Note: Sample rules for these populations are delivered as inactive and are not validated. Before the rules can be used at your institution, they must be analyzed, validated, and activated.

To use these rules, you must ensure that the Web Tailor Parameter `ENABLE_GORRSQL_SSB_ROLES` is set to Y.

- (Optional) Access the Proxy Access Communication Rule (GERCOMM) form to configure the New Proxy and Delete Relationship communication settings for Global Proxy Access. For more information, please see [“Customize e-mail communications” on page 30.](#)



Note: By default, the **Send e-mail?** checkbox for the Person Letter Code is not selected for the Global Proxy Access System Code.

- In Web Tailor Administration, enable the following pages associated with Global Proxy Access using the Customize a Web Menu or Procedure page:

bwgkpxya.P_PA_DeleteRETP	Delete Global Proxy Access Relationship
bwgkpxya.P_PAShowSelector	Display Global Proxy Access Person Selector Form
bwgkpxya.P_GlobalProxyAccess	Global Proxy Access

- In Web Tailor Administration, enable the Proxy Global Access role for the users that require Global Proxy Access using the Update Users Roles page.

Update User Roles

Please select the roles you would like to give the user, then Submit.

NOTE: You may only select user defined roles - system defined roles are the override for twbkslib.P_FetchRoles (if defined). The "Enabled" colour the system managed roles.

You have selected: Les Holt

Role	Selectable	Enabled
Proxy Global Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Note: You may also assign this role using a GORRSQL rule.

- In Web Tailor Administration, establish the Web Tailor menus that are associated with the new relationship type using the Customize a Web Menu or Procedure page.

Customize a Web Menu or Procedure

Please update the information and Submit Changes.

* - indicates a required field.

Local	
Page Name: *	PROXY_ACCESS_UNIV_ADMINISTRATION
Description: *	Global Admin Access
Module: *	PROXY_ACCESS
Comments:	
Enabled Indicator:	<input checked="" type="checkbox"/>

- In Web Tailor Administration, establish the pages that are associated with the Web Tailor menu using the Reorder or Customize Menu Items page.

Reorder or Customize Menu Items

To update an individual menu item, select the associated URL.

Menu Items for: Global Admin Access

Sequence Number	Source	Link Text	URL	Enabled
1	Local	E-mail	bwgkogad.P_SelectEmailView	Y
2	Local	Emergency Contacts	bwgkoemr.P_ViewEmrgContacts	Y
3	Local	View Address	bwgkogad.P_SelectAtypView	Y

Customize the selected Menu Item

Enter your Web Menu or Procedure information and Submit Changes.

* - Indicates a required field.

Associated Web Page: Global Admin Access

Sequence Number: 1

URL:* bwgkogad.P_SelectEmailView

Link Text: E-mail

Link Description:

Status Bar Text:

Bullet Override Image: Select Preview Image

Menu Link Image: Select Preview Image

Enabled:

Database Procedure:

Submenu Indicator:

Once you have completed setting up the menu, the authorized user may now select the Global Proxy Access menu.

Proxy Access Menu

Proxy Management

This page allows you to add proxy access to selected Banner Web pages. Anyone with an e-mail address can be a proxy.

Proxy Access

This page enables access to any Banner Web user that has added you as a proxy and has authorized pages for you to view.

Global Proxy Access

This option allows you to define yourself as a proxy for another person.

11. Click **Global Proxy Access** to access the Global Proxy Access page.

Global Proxy Access

Use the Add tab to populate your proxy tabs. Select a named tab to enter PROXY MODE. You will then see a list of links for pages available for that user based on the relationship you selected. While in PROXY MODE the links and tabs above will be disabled. Select the Add tab (or close your browser) to exit proxy mode. When you activate a link, the focus will change to another browser window dedicated to proxy display. The window title and page content (including links) are only valid for the selected user. It is suggested that you remove your proxy relationships when finished by selecting the delete icon on each proxy tab.

Add

Proxy as another user

Input Banner ID and relationship for person you would like to proxy for.

* - indicates a required field.

Banner ID * VONTEST

Relationship * University Administration

Add

12. Enter the Banner ID, select the new relationship, and click **Add**.



Note: There is no lookup for the Banner ID, it must match an existing SPRIDEN record.

For each ID defined, a tab will be created that you can select and then access the appropriate pages for that user.



Note: The same rules are in effect for Global Proxy Access users that are in effect for standard proxy users, the proxy can only access pages that the proxied person has access to on their own. Once access for the proxied person is removed, then the access for the proxy will no longer exist. By default, Global Proxy Access is active for one day.

Global Proxy Access

Use the Add tab to populate your proxy tabs. Select a named tab to enter PROXY MODE. You will then see a list of links for pages available for that user based on the relationship you selected. While in PROXY MODE the links and tabs above will be disabled. Select the Add tab (or close your browser) to exit proxy mode. When you activate a link, the focus will change to another browser window dedicated to proxy display. The window title and page content (including links) are only valid for the selected user. It is suggested that you remove your proxy relationships when finished by selecting the delete icon on each proxy tab.

Proxy Authorizations
The following Banner Web page links have been specifically authorized for your use. All pages will display in a dedicated Proxy Access window. Use the EXIT link to close the Proxy Access window. There is no need to close the window until you have completed all proxy access.

Global Admin Access for Dixie Newname
e-mail
Emergency CContacts
View Address

In this example, when Dixie logs on, she will see that Les von Test has been established as a proxy. Additionally, the relationship of University Administration is protected may not be updated like other proxy relationships can. However, if the dates are changed, the administrator will no longer see that student in their Global Proxy list.

Proxy Management

Proxy List
Expand a proxy to define relationship type, begin & end dates, and authorizations.

Expand Dixie Newname les.vonholstein@yahoo.com 3 pages
Collapse Les von Holstein ssb_proxy1@yahoo.com

Proxy Profile
Please select your relationship with this proxy. The list of pages available to the proxy is based on relationship type proxy (dad, mom, soccer coach, company name). The passphrase can be used to determine FERPA identity for who communicate the passphrase to your proxy. You can control the start and end dates for proxy access below.

* - indicates a required field.

Relationship* University Administration
Description _____
Passphrase _____

Start Date (MM/DD/YYYY)* 10/09/2011 [SP]
Stop Date (MM/DD/YYYY)* 10/09/2011 [SP]

E-mail Passphrase Reset Pin Grant One Time Only Access

In this example, the student will not be able to change the access type, but the student can view the authorizations, history, and communications. If the user has changed the authorized pages, the administrator would not have access until the administrator changed the relationship, which would reset the access.

Multiple Global Proxy Access relationships

It is possible to setup multiple Global Proxy Access relationships and define which users at your institution have access to which relationships. GORRSQL rules are used to define which users have access to which relationships. To define multiple Global Proxy Access relationships, perform the following steps:

1. Using the GTVSQRU form, create a GORRSQL rule code with a name of PROXY_<relationship_code>, where relationship_code may be a maximum of 30 characters. For example, to create a rule for UNIV_FINAID the rule code would be PROXY_UNIV_FINAID.
2. On GORRSQL create a rule using PROXY_RELATIONSHIP_CHECK and the PROXY_<relationship_code> rule code that you created above.

This rule must return a Y if the user is eligible to access that specific relationship.



Note: All the other proxy rules are still in effect, however this rule will limit the types of relationships that may be selected.

3. If necessary, use the following bind variables:
 - PIDM - the PIDM of the user trying to create a relationship.
 - PROXY_SYSTEM - the SYSTEM code as defined on GTVSYST.
 - PROXY_RELATIONSHIP - the relationship code for which you are creating the rule, as defined on GTVRETP.
4. Ensure that the rules are current, for example the current date must lie between the specified Start Date and End Date, active, and validated.



Note: These rules can be applied to a standard PROXY, but are more useful with a GLOBAL_PROXY.

Multiple Global Proxy Access relationship examples

If you want to set up a Global Proxy Access Relationship for UNIV_PAYROLL, you may want to limit access to those users who are defined on PTRUSER as a Master Employee, Master Employee Class, or Master Organization.



Note: The following examples will need to be adapted and tested for your own specific requirements.

For example:

```
SELECT 'Y'
FROM ptruser, gobeacc
WHERE gobeacc_pidm = :PIDM
AND ptruser_code = gobeacc_username
AND (ptruser_master_ecls_ind = 'Y' OR
ptruser_master_empr_ind = 'Y' OR
ptruser_master_orgn_ind = 'Y');
```

If you want to set up a Global Proxy Access Relationship for a Student Administrator, you may want to ensure that they have an ADMINISTR role established on SOAROLE that is active for at least one currently active term. For example:

```
SELECT 'Y' FROM
  (SELECT MIN(stvterm_start_date) min_date, MAX(stvterm_end_date) max_date
   FROM stvterm, sobrole
   WHERE sobrole_pidm = :PIDM
        AND sobrole_role_code = 'ADMINISTR'
        AND stvterm_code = sobrole_term_code_eff)
 WHERE trunc(SYSDATE) BETWEEN trunc(min_date) AND trunc(max_date);
```