

Banner Faculty and Advisor Self-Service Release Guide

*Release 8.4
April 2010*



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Revision History Log

Publication Date	Summary
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April 2010	New version that supports Banner Faculty and Advisor Self-Service 8.4 software.
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Banner Faculty and Advisor Self-Service 8.4 Release Guide

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Introduction

This release guide documents Release 8.4 of Banner® Faculty and Advisor Self-Service. Release 8.4 includes enhancements and problem resolutions.

Enhancements for 8.4

This document describes the following enhancements, which are new for Release 8.4.

Study Paths in Self-Service Registration

Study paths can be enabled for use in Self-Service. You can make them optional or required for registration. You can allow students and faculty members to view or change study paths while adding or dropping courses. You can also use new rules on GTVSDAX to display term date ranges in the term pulldown lists in Banner Faculty and Advisor Self-Service.

Student Centric Periods

Student centric periods are made up of multiple terms or groups of terms that are used with enrollment or registration. A student centric period is assigned to a student using a cycle designator. Student centric cycles are inserted into the general student record during the admissions process. They can also be dynamically assigned during the registration process. Student centric periods use processing rules to determine time status, academic standing, and student type. Student centric periods are carried into academic history and are used for GPA calculations along with terms and student levels.

Miscellaneous Enhancement

This section includes a list of delivered objects that will be used with a future enhancement.



1 Study Paths in Self-Service Registration - Functional



Overview

This section discusses using study paths in Banner Faculty and Advisor Self-Service. Study paths can be optional or required for registration. You can allow students or faculty members to view or change study paths while adding or dropping courses. Additional Self-Service functionality is delivered that uses a new rule on GTVSDAX to display term date ranges in the Web page term pulldown lists.

Please see the *Banner Student 8.4 Release Guide* and the *Banner Student Self-Service 8.4 Release Guide* for more information.

Use study paths in Self-Service

Study paths can be used in Self-Service. When study paths are enabled in Banner Student (the **Enable Study Paths** checkbox is checked on SOACTRL), study path information will be displayed in Self-Service.

When you allow study paths to be updated (the **Change Study Path** checkbox is checked on SOATERM), the student or faculty member can change the study path after registering for a course using the Change Class Options page in Self-Service. When study paths cannot be updated (the **Change Study Path** checkbox is unchecked on SOATERM), the study path information on the Change Class Options page is display only.

When study paths are required (the **Study Path Required** checkbox is checked on SOATERM), the student or faculty member must select one to continue processing. When study paths are not required (the **Study Path Required** checkbox is unchecked on SOATERM), the student or faculty member may select *None* and continue.

When study paths are enabled and a term is selected, when the user chooses to add or drop courses, the new Select Study Paths pages are displayed. Once the study path is selected, processing continues to the Add or Drop Classes page for registration.

Set up study paths in baseline

Use these steps to set up study paths. Please refer to Appendix E “Study Path Processing” in the *Banner Student User Guide* for information on using study paths in baseline Banner Student.

1. Build study path status codes on STVSTSP.
2. Check the **Active and Allow Registration** indicator on STVSTSP for study path codes that permit registration.
3. Check the **Enable Study Paths** indicator for the curriculum rules on SOACTRL.
4. Define the study path naming convention in the Study Path Name Components Window on SOACTRL.
 - 4.1. Enter the sequence number for the column order in the study path name.
 - 4.2. Enter the columns from SOVSPNM that are used in the study path name.
 - 4.3. Enter separators for the column values in the study path name.
5. Check the **Study Path** indicator on SOACURR to enable study paths for the curriculum rule during admissions acceptance.
6. Check the **Study Path Required** indicator on SOATERM if you wish to require study paths on all registered courses.
7. Set up study path information for students in the Study Path window on SGASTDN.
 - 7.1. Enter status information in the Study Path Status block.

When study paths are created, the default status is *AS* (active study paths).
 - 7.2. Enter any pertinent student information in the Study Path Student Information block.
8. Use the **Study Path** field on SGASADD to include student cohorts in the study path.
9. Use the **Study Path** field on SGASADD to include student attributes in the study path.
10. Use the Enrollment Study Path block on SFAREGS to enter the enrollment study path status and allow study paths to be associated with courses during registration.

11. Set up study path information in the Study Path window on SFAREGS.
 - 11.1. Enter status information in the Study Path Status block.
 - 11.2. Enter student information in the Study Path Student Information block.
12. Check the **Roll and Apply Courses by Study Path** indicator on SHACTRL to include the study path code in the match between the learner and outcome curriculum records for the outcome record creation.
13. Use SHRROLL to roll grades to history with or without study paths.

Set up study paths in Self-Service

Use these steps to set up study paths in Banner Faculty and Advisor Self-Service.

1. Enable study paths on SOACTRL using the **Enable Study Paths** checkbox.
2. Check the **Study Path Required** checkbox on SOATERM to require study paths for registration.

When this indicator is unchecked, the use of study paths is optional. Students with study paths will still be prompted to selected a study path for registration.

3. Check the **Change Study Path** checkbox on SOATERM to allow students or faculty members to change the study path on the Add or Drop Classes page.

Display term date ranges in Self-Service

A new system-required rule is delivered on the Crosswalk Validation Form (GTVSDAX) for use with term selection in Banner Faculty and Advisor Self-Service. Use this rule to include term date ranges in the **Term** field pulldown lists. This helps the user determine which term to select without being dependent on term descriptions.

Set the *WEBTRMDTE* rule for group *FACWEB* to *Y* to display date ranges for terms in Banner Faculty and Advisor Self-Service pages where the term is selected. The date display format is controlled by the setting in Banner General.

Note

Displaying term start and end dates is not a requirement of using study paths in registration. ■

External Code	Internal Code	Internal Code Sequence Number	Internal Code Group	Description	Activity Date
N	WEBTRMDTE	N/A	FACWEB	Web Term Displays Dates	Sysdate

New Web pages

The following Web pages are new for this enhancement.

Select Study Paths (bwckcoms.P_StoreStudyPath) and (bwckcoms.P_StoreMultiStudyPath)

Two new pages have been added for use with study paths. The Select Study Path pages are used to select a study path when registering for a single term (bwckcoms.P_StoreStudyPath) and to select study paths for multiple terms (bwckcoms.P_StoreMultiStudyPath) when registering from the Look Up Classes page (bwckgens.p_sel_term_date) using a date range.

These pages are available when the **Enable Study Paths** checkbox is checked on SOACTRL. These pages are not available when study paths are optional (the **Study Path Required** checkbox is unchecked on SOATERM), when the student registering has no valid study paths.

When a term is selected and then the Add or Drop Classes page (bw1kfrad.P_FacAddDropCrsee) is accessed and a study path is required for registration, the Select Study Paths page (bwckcoms.P_StoreStudyPath) is displayed first. You can select a study path from the **Select a Study Path** field and press the **Submit** button. You are then returned to the Add or Drop Classes page (bw1kfrad.P_FacAddDropCrse).

When study paths are not enabled, the Select Study Paths pages (bwckcoms.P_StoreStudyPath) or (bwckcoms.P_StoreMultiStudyPath) are not displayed. You are taken directly to the Add or Drop Classes page (bw1kfrad.P_FacAddDropCrse).

When study paths are enabled but not required (the **Study Path Required** checkbox is unchecked on SOATERM), and the student being registered has no valid study paths for the selected term, processing takes the user directly to the Add or Drop Classes page (bw1kfrad.P_FacAddDropCrse). The Select Study Paths pages (bwckcoms.P_StoreStudyPath) or (bwckcoms.P_StoreMultiStudyPath) are not displayed.

When the **Study Path Required** checkbox is checked on SOATERM, study paths are required. You must select a study path to proceed, or an error is displayed. If no valid study path exists for registration, you cannot proceed. When the **Study Path Required** checkbox is unchecked on SOATERM, study paths are optional. You can choose a study path value or select *None* from the **Select a Study Path** field.

Only study paths with a curriculum that is active and current for the term and statuses that allow registration will be displayed in the study path list. An error is displayed if the student has no study paths that are eligible for registration. Only one study path can be selected at a time.

Web Page Fields

Item	Description/Source Information
Select a Study Path	Study path for the student's courses. Select a value from the list. When study paths are required, a value must be selected. When study paths are optional, <i>None</i> can be selected.

Setup Requirements

Item	Description
Term Control Form (SOATERM)	To enable study paths, check the Enable Study Paths checkbox on SOACTRL. To require study paths, check the Study Path Required checkbox on SOATERM. To allow changes to study paths, check the Change Study Path checkbox on SOATERM.

Updates to Banner

This page does not update information in the Banner database.

Links to Other Web Pages

This page does not have links to other pages.

Buttons/Icons on This Page

Button/Icon	Action
Submit	Goes to the Add or Drop Classes page (bwlkfrad.P_FacAddDropCrse)

Buttons/Icons on This Page

Button/Icon	Action
Register	Goes to the Add or Drop Classes page (bw1kfrad.P_FacAddDropCrse) when looking up classes by date range

Changed Web pages

The following Web pages have been modified for this enhancement.

Add or Drop Classes (bw1kfrad.P_FacAddDropCrse)

A new **Study Path** field has been added to the Current Schedule information. It displays the study path for the CRN. When the **Study Path Required** checkbox on SOATERM is checked, a study path must be entered in order to register for the class. When a study path has been selected, the detail of the selected study path is displayed in the Add Classes Worksheet section. When *None* is selected, the detail text informs the faculty member that courses entered for registration will not have a study path applied to them. When study paths are not in use (the **Enable Study Paths** checkbox is unchecked on SOACTRL), the **Study Path** field is not displayed.

A **Select Study Path** button has been added to this page. The button is used to open the Select Study Paths page (bwckcoms.P_StoreStudyPath) so you can select a value for the **Study Path** field or change the existing study path. You can then return to the Add or Drop Classes page (bw1kfrad.P_FacAddDropCrse) and complete adding or dropping classes.

When the Add or Drop Classes page (bw1kfrad.P_FacAddDropCrse) is selected from the main menu and a study path is required for registration, the Select Study Paths page (bwckcoms.P_StoreStudyPath) is displayed first. You can select a study path from the pulldown list and press the **Submit** button. Processing then takes the user to the Add or Drop Classes page (bw1kfrad.P_FacAddDropCrse).

Change Class Options (bw1kfrad.P_FacChangeCrseOpt)

A new **Study Path** field has been added to the page. It allows the faculty member to change the study path to which the course is assigned. This field is displayed in each section of information such as Instructional Methods and so on. You can select values from the pulldown list when multiple study paths exist that are eligible for the term.

- When the **Change Study Path** checkbox on SOATERM is checked, users are allowed to change the study path on this page.

- When the **Change Study Path** checkbox on SOATERM is not checked, the study path that was selected at the time of registration is displayed, but it cannot be changed.
- When the **Enable Study Paths** checkbox is unchecked on SOACTRL, this field is not displayed.

Look Up Classes (bwckgens.p_sel_term_date)

The **Select Study Paths** pages (bwckcoms.P_StoreStudyPath) or (bwckcoms.P_StoreMultiStudyPath) are displayed from this page with a list of study paths for all terms from which courses have been selected for registration.

When the Look Up Classes page is used to search for a course by term, the faculty member can select a study path to apply to the courses that will be returned by the search. When this page is used to search for courses using a date range that spans multiple terms, the faculty member can select CRNs for multiple terms and select a valid study path for each term. This allows the faculty member to choose different study paths for each term when multiple terms are selected.

Look-Up Classes Results (bwkffcs.P_FacGetCrse)

When study paths are enabled and a date range has been used for the course search, the **Register** button on this page is changed to read **Submit**. This indicates that the **Select Study Paths** page (bwckcoms.P_StoreStudyPath) will be displayed before registration occurs. When the **Submit** or **Register** button is pressed, the student's eligibility is checked, and the study path enrollment records (SFRENSP) and overall term enrollment records (SFBETRM) are created, if they do not already exist.

When the **Study Path Required** checkbox is checked on SOATERM, study paths are required during registration. You must select a study path to proceed, or an error is displayed. If no valid study path exists for registration, you cannot register for courses in that term. The CRNs will not be registered when the **Submit** button is pressed. When the **Study Path Required** checkbox is unchecked on SOATERM, study paths are optional. You can choose a study path value or select *None* from the **Select a Study Path** field.

Look up classes and search by date range

Do the following to look up classes and search by date range as a faculty member when you have already selected a student ID and PIN:

1. Select Look Up Classes from the main menu.

The process takes you to the **Select Term or Date Range** page (bwckgens.p_proc_term_date).

2. Enter dates in the **Search by Date Range From** and **To** fields in the specified date format.

3. Click the **Submit** button.

The process takes you to the Look Up Classes page (bwckgens.p_sel_term_date) where you can specify parameters for a CRN search.

4. Enter the CRN search parameters, including the **Subject** field, or set the parameters to *All*.

The **Subject** field is required. You can select multiple subjects using the Ctrl key.

5. Click the **Class Search** button.

The process returns the search results by term in the Sections Found information on the Look-Up Classes Results page (bwlkffcs.P_FacGetCrse).

Courses are sorted by term and subject. The **Select** checkbox is displayed next to courses that are not restricted by course data or student registration restrictions. You can choose one or more courses from multiple terms in which to register.

6. Check the **Select** checkbox for each CRN in which you wish to register, whether study paths are in use or are not in use.

- 6.1. When study paths are *not* in use, click the **Register** button.

The **Register** button is displayed when **Enable Study Paths** is unchecked on SOACTRL.

The process goes to the Add or Drop Classes page (bwlkfrad.P_FacAddDropCrse), and the courses are recorded.

- 6.2. Use the Add or Drop Classes page to drop courses you selected from the search results or to perform additional class searches.

OR

- 6.3. When study paths *are* in use, click the **Submit Changes** button.

The **Submit Changes** button is displayed when **Enable Study Paths** is checked on SOACTRL, and it takes the place of the **Register** button.

The process goes to the Select Study Paths page (bwckcoms.P_StoreMultiStudyPath) for study path selections.

- 6.4. Use the **Select a Study Path** field to choose a study path for each term in which courses have been selected for registration.

If study paths are required for the term associated with the selected CRN, you must choose a study path, or an error is displayed. If study paths are optional, you can choose a study path value or choose *None*.

The page displays information below each term description that indicates whether study paths are optional or required for each term.

- 6.5. After study paths have been selected, press the **Register** button to register for the courses.
- 6.6. The process goes to the Add or Drop Classes page (bwlkfrad.P_FacAddDropCrse), and the courses are recorded. You can drop courses you selected from the search results or perform additional class searches.

General Student Information (bwlkgstu.P_FacStuInfo)

A new **Study Path** field has been added to display the study path for the primary and secondary curriculum records. When the **Enable Study Paths** checkbox is unchecked on SOACTRL, this field is not displayed.

Registration History (bwskhreg.p_reg_hist)

A new **Study Path** field has been added to display the study path for the CRN in registration history. When the **Enable Study Paths** checkbox is unchecked on SOACTRL, this field is not displayed.

Also, the **Associated Term** field has been removed. The term information is now displayed above the group of CRNs with which it is associated.



2 Study Paths in Self-Service Registration - Technical



Changed packages

The following packages have been changed for this enhancement.

- BWCKCAPP
- BWCKCOMS
- BWCKCTLG
- BWCKFRMT
- BWCKGENS
- BWCKLIBS
- BWCKREGS
- BWCKSAMS
- BWCKSMDS
- BWLKFFCS
- BWLKFRAD
- BWLKOIDS
- BWLKOSTM



3 Student Centric Periods - Functional



Overview

This section discusses using student centric periods in Banner Faculty and Advisor Self-Service. A new Web page has been added to view the concise student schedule by student centric period. The Self-Service transcript has also been updated to display student centric period information. Refer to the baseline setup and processing information in the *Banner Student 8.4 Release Guide* before using this new functionality in Self-Service.

Please see the *Banner Student 8.4 Release Guide* and the *Banner Student Self-Service 8.4 Release Guide* for more information.

New Web page

The following Web page is new for this enhancement.

Student Schedule by Centric Period (bwlkfstu.P_FacStuSchd_Scp)

This page displays the details of all sections in which a student is currently enrolled for the selected term by student centric period. You must: select a term from the Select Term page (Select Term (bwlkostm.P_FacSelTerm), enter a student or faculty ID in the Student and Faculty Advisee Selection page (bwlkoids.P_AdvIDSel or bwlkoids.P_FacIDSel), and verify the student (advisee) on the Student Verification page (bwlkoids.P_FacVerifyID), before you can view the Student Schedule by Centric Period page (bwlkfstu.P_FacStuSchd_Scp) from the Student Information Menu.

The process checks the general student record for the term and retrieves the cycle designator if it exists. Then the process determines student centric period and selects the coursework for all the associated terms. Courses are sorted by most recent term, subject, course number, and section. If no cycle designator exists for the effective term on the general student record, a message is displayed when the page is accessed.

The display of registered courses on this page is controlled by the **Print On Schedule** checkbox on the Course Registration Status Code Validation Form (STVRSTS). Only

courses with statuses for which the **Print On Schedule** checkbox selected are included when the schedule is displayed. It is recommended that statuses for dropped courses should not have the **Print On Schedule** checkbox selected, as listing dropped courses on the schedule may cause confusion.

If your institution has implemented delivery of course material via WebCT when Campus Pipeline is not in use, the title of each section with WebCT delivery can be displayed as a link to your WebCT login page. The section title is displayed as a link only for sections flagged for WebCT content and/or delivery.

Web Page Fields

Item	Description/Source Information
Name	Student's name.
Classification	Student's classification (for example, Freshman, Year 3, and so on).
Level	Student's level.
College	Name of the college associated with the student.
Major and Department	Major and department associated with the primary curriculum.
Concentration	Concentration associated with the primary curriculum.
Minor	Minor associated with the primary curriculum.
CRN	Course reference number.
Course	Subject code and course number, concatenated.
Title	Base course title.
Campus	Campus associated with the class.
Credits	Credit hours for which the student is registered for the class.
Level	Level at which the student is registered for the class.
Start Date	First date on which the class meets for traditional classes or date selected as the start date for Open Learning classes.
End Date	Last date on which the class meets for traditional classes or date selected as the end date for Open Learning classes.
Days	Day(s) on which the class meets.

Web Page Fields

Item	Description/Source Information
Time	Class's meeting times.
Location	Location or room assignment where the class meets.
Instructor	Name of the instructor. The last name prefix is displayed, if applicable. If the primary instructor is associated with the session, this is the primary instructor's name; if not, this is the most recent instructor added to the session.

Setup Requirements

Item	Description
WebTailor parameters	<p>If your institution is using WebCT and you want class titles to be displayed as hyperlinks to the WebCT login page, take the following actions.</p> <ul style="list-style-type: none">• Set the WEBCTINUSE parameter to <i>Y</i>.• Set the CPINUSE parameter to <i>N</i>.• Set the WEBCTLOGIN parameter to the URL for the links' destination. The URL must be complete, including domain, destination, and port. For example: <code>http://university.edu:1234/webct/ticket/ticketLogin</code>
Crosswalk Validation Form (GTVSDAX) - for WebCT	<p>If your institution is using WebCT and you want to identify schedule types for WebCT content and/or delivery, create a row for each applicable schedule type as follows.</p> <ul style="list-style-type: none">• In the Internal Code field, enter <i>WEBCONTENT</i>.• In the Internal Group field, enter <i>INTCOMP</i>.• In the External Code field, enter the schedule type.• In the Translation Code field, enter <i>WEBCT</i>.

Setup Requirements

Item	Description
Crosswalk Validation Form (GTVSDAX) - for student centric periods	<p>Set the <i>PROCESSSCP</i> rule to <i>Y</i> to use student centric processing.</p> <p>Set the <i>AUTOASSIGN</i> rule to <i>Y</i> to automatically assign the cycle designator during admissions based on the data on SOASCPT, when a student is admitted and the initial general learner record is created.</p> <p>Set the <i>AUTOUPDATE</i> rule to <i>Y</i> to validate the cycle designator for the student's first enrollment record at registration.</p> <p>When the first enrollment term has a different cycle designator than the one assigned during admissions, a new general student record is created. When this rule is <i>N</i>, the cycle designator is not automatically updated when a student enrolls for the first term. The cycle designator assigned during admissions is not valid.</p>

Updates to Banner

This page does not update information in the Banner database.

Links to Other Web Pages

This Link	Action
Student's name	Goes to the View Student Addresses and Phones page (bwlkosad.P_FacSelectAtypView).
Student Detail Schedule	Goes to the Student Detail Schedule page (bwlkfstu.P_FacStuSchd).

Buttons/Icons on This Page

This page does not have buttons to other pages.

Web Menus With Links to This Page

Student Information Menu bmenu.P_FacStuMnu

Changed Web page

The following Web page has been modified for this enhancement.

Student Academic Transcript (bwlkftrn.P_ViewTran)

This page has been modified to display course history information and GPA totals by student centric period for students included in student centric periods when the **Student Centric Period Statistics** checkbox is checked on SHATPRT.

Changed menu

The Student Schedule by Centric Period option has been added to the Student Information Menu (bmenu.P_FacStuMnu).



4 Student Centric Periods - Technical



Changed packages

The following packages have been changed for this enhancement.

- BWCKCRSE
- BWCKOTR1
- BWLKCRSE
- BWLKFSTU
- BWLKFTRN



5 Miscellaneous Enhancement



Objects delivered for future use

This release provides foundational changes that support a future enhancement. This enhancement will allow DegreeWorks to be used for prerequisite checking during Banner registration. The final release date for this enhancement will be included in a future version of the product calendar.

The following objects have been modified and are delivered with this release.

- BWCKCTLG/BWCKCTL1
- BWCKSAM1
- BWCKSCHD/BWCKSCH1



6 Problem Resolutions



The following problem resolutions are delivered with this release.

 **Note**

For comprehensive and detailed problem, impact, and resolution information for all defects corrected in this release, refer to the supplemental problem resolutions file (facss80400resolutions.txt) delivered along with your release guide. The information in this text file is extracted directly from the Customer Support Center just prior to release of the product and may include additional defects that were resolved after this document was finalized. ■

Object	Number	Summary
BWCKSXML, BWCKSXM1	#1-8Y4UD7	As of Release 8.2, the Email Your Advisor link and the Email Student link were no longer displayed at the bottom of the Degree Evaluation page.
BWLCXCH1	#1-AVWS4D	There was a potential security risk in Self-Service Banner due to Oracle errors being displayed to end users.
BWLCXCH1	#1-912J7E	The Faculty Dashboard Channel only displayed the channel title. For some users this happened when the channel was initially rendered, and for others it happened when the More link was used.
BWLKGRD1	#1-46CGSV	After upgrading to 7.5.1, the new Advisee Grade Summary page (bwlkgrde.P_advfingrd) was listing advisees that had been assigned to a different advisor. The system did not appear to be correctly taking the effective term into account.
BWSCXCH1, BWSKWPR1, BWCKCOM1, BWCKSAM1	#1-AVWS3U	There was a potential security risk in Self-Service Banner due to Oracle errors being displayed to end users.

Object	Number	Summary
BWCKSXM1	#1-AV6ANO	The optional dropdown display did not auto submit to redraw the page.
sstvproci_080302.sql, ssorfacsi_080302.sql	#1-ASP21P	<p>After upgrading to 8.3, faculty members received an Oracle error when trying to choose a CRN:</p> <p>New security rules were created on SOAFACS for use in Faculty Self-Service. If system-required records were missing on STVPROC, then the SOAFACS records would not be created correctly during the upgrade process.</p> <p>The full list of system-required values is:</p> <ul style="list-style-type: none"> • COMPLIANCE • DISPLAYGRADES • DISPLAYHOLDS • DISPLAYSCHEDULE • DISPLAYTESTS • ENTERGRADES • TRANSCRIPT