

Banner Financial Aid Self-Service Release Guide

*Release 8.1
April 2008*



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Revision History Log**Publication Date Summary**

| | |
|---------------|---|
| Original Date | New version that supports Banner Financial Aid Self-Service 8.1 software. |
|---------------|---|

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Banner Financial Aid Self-Service 8.1 Release Guide

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Overview

This release guide addresses the changes necessary to remove the Financial Aid components from the Banner Student Self-Service product. The purpose is to create a Banner Financial Aid Self-Service product with release cycles independent of the Banner Student Self-Service delivery cycle. Future releases of the Financial Aid Self-Service product will provide enhancements and updates in a faster and more predictable time frame.

This release is primarily directed at performing architectural changes to create a separate and distinct product. There is now a separate Banner Financial Aid Self-Service menu. A new Financial Aid user role enables you to grant Banner Financial Aid Self-Service privileges to a student.

The Banner Financial Aid Self-Service 8.1 release is the initial release of the Banner Financial Aid Self-Service product. The sole purpose of this release is to create this new product. A new *Banner Financial Aid Self-Service 8.1 User Guide* for this new product is also available for download.

Banner Financial Aid Self-Service Product Separation

The following steps were performed to separate the Banner Financial Aid Self-Service product from the Banner Student Self-Service product.

New Financial Aid TWTVROLE Role

The WebTailor User Role Validation Table (TWTVROLE) lists the valid roles that can be granted to a user or assigned to a menu item.

A new role was added to the TWTVROLE table for Banner Financial Aid Self-Service. The *FINAID* role is for a financial aid user.

As long as a student has a RORSTAT record, the student has a *FINAID* role. No additional setup is required.



Note

SunGard Higher Education delivers Web roles as appropriate for baseline product functionality. You may create new roles and remove Web roles from certain Self-Service pages or add them to Self-Service pages as you deem appropriate. See the Web Roles section of the Technical Reference chapter of the *Banner WebTailor User Guide* for additional information. ■

Web Tailor Main Web Page Settings Table (TWGBWMNU)

This table contains the main definitions for all menus and menu items in the self-service applications.

- A new `TWGBWMNU_NAME=bmenu.P_FinaidMainMnu` Financial Aid Main Menu was created.
- The existing `TWGBWMNU_NAME=bmenu.P_StuMainMnu` Student Main Menu was updated accordingly.

New Column Added to GOVROLE View in Banner General

A new Financial Aid role indicator column was added to the User Roles View using an existing `f_finaid_applicant_ind` function. The `govrole.sql` script creates the new `GOVROLE_FINAID_IND` column.

Financial Aid Forms (bmenu.P_FAFormsMnu)

The selection of forms on the Financial Aid Forms Page is determined by your institution. The `bmenu.P_FAFormsMnu` page is a WebTailor menu that can be accessed using your WebTailor account. You can view how the sample data is set up as menu items and then use the same procedure to add your own menu items and customize the sample entries. All the forms listed on the page *must* be stored in the `resdocs` directory on the Web server. The sample PDF forms will already be stored in the `doc` directory under `resweb` in the database as part of the install (`$BANNER_HOME/resweb/doc`). If you add other forms to the menu, you must put the corresponding files into the `resdocs` directory on the webserver. Each link on the menu must point to the corresponding document in the format `/resdocs/[filename.ext]`. (Similarly, graphic files are stored in `$BANNER_HOME/resweb/gif` and as `resgifs` on the webserver.)

Warning



The Banner Financial Aid Self-Service `resdocs` directory replaces the directory that was once known as the `studocs` directory in Banner Student Self-Service. The `resdocs` directory now houses financial aid-related documents formerly stored in the `studocs` directory. If you have documents saved in the `studocs` directory that are accessed from the Financial Aid Forms page, you must copy them over to the `resdocs` directory and update the links on this page in WebTailor after the release has been installed. ■

Product Menus - Self-Service





Banner Financial Aid Self-Service

The following table illustrates the new appearance of the Banner Financial Aid Self-Service product menu.

| Financial Aid (bmenu.P_FinaidMainMnu) | | |
|---|--|---|
| Financial Aid Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan application. | Financial Aid Status View overall status, holds, academic progress, cost of attendance, financial aid awards, and messages. bwrksumm.P_Dispsumm | |
| | Eligibility Review Financial Aid Holds (which may prevent payment of awards) and document requirements; Display academic progress history. | Holds bwrkhold.P_Disphold |
| | | Student Requirements bwrktrkr.P_Disptrkreq |
| | | Academic Progress bwrksaph.P_Dispsap |
| | Award View account summary; Review awards; Accept award offers; Display award payment schedule; View loan applications; Review withdrawal information. | Account Summary By Term bwskoacc.P_Viewacct |

| Financial Aid (bmenu.P_FinAidMainMnu) | | |
|---------------------------------------|--|---|
| | | Award for Aid Year bwrkrhst.P_DispaWdAidYear |
| | | Accept Award Offer bwrkacpt.P_DispaAcptAwdAidYear |
| | | Award Payment Schedule bwrkpays.P_DispaPaySched |
| | | Award History bwrkrhst.P_DispaWdHst |
| | | Loan Application History bwrklhst.P_DispaLoanHst |
| | | Withdrawal Information bwrktivw.P_TitleIVWithdraw |
| | E-Mail SCT University Financial Aid Office | FinAidOffice@SCTUniv.edu |
| | General Financial Aid Financial Aid Application and Information Links |  Download Financial Aid Forms Access the forms you need in order to apply bmenu.P_FAFormsMnu |
| | |  Federal Aid Application or Renewal Application Complete the FAFSA On-Line http://www.fafsa.ed.gov/ |

Financial Aid (bmenu.P_FinaidMainMnu)

| | |
|--|--|
| |  <p>General Scholarship Search Tools Find other sources of scholarships http://www.fastweb.com</p> |
| |  <p>Government Services Access education and non-education related services http://www.students.gov/</p> |
| |  <p>General Financial Aid Information General information about student financial aid http://www.finaid.org/</p> |
| |  <p>National Student Loan Data System Review your student loan debt http://www.nslds.ed.gov/nslds_SA/</p> |

| | | |
|--|--|--|
| | |  <p>Federal Direct Lending Data</p> <p>Communicate with your Direct Lending servicer</p> <p>https://www.dlsonline.com/borrower/BorrowerWelcomePage.jsp</p> |
| | |  <p>Education Loan Management System</p> <p>Review the status of your current loans</p> <p>http://www.elmresources.com/</p> |
| | |  <p>Department of Education Information</p> <p>Find out about government education initiatives</p> <p>http://www.ed.gov/index.jhtml</p> |
| | |  <p>CSS PROFILE Registration</p> <p>Register for CSS PROFILE On-Line</p> <p>https://profileonline.collegeboard.com/index.jsp</p> |

Banner Student Self-Service

The following table illustrates the new appearance of the Banner Student Self-Service product menu.

| Student (bmenu.P_StuMainMnu) | |
|--|--|
| Student | Admissions |
| Apply for Admission, Register, and View your academic records. | Apply for Admission or Review Existing Applications bwska1og.P_DispChoicesStu |
| | Registration |
| | Check your registration status, class schedule and add or drop classes. |
| | Select Term |
| | bwskflib.P_SelDefTerm |
| | Add or Drop Classes |
| | bwskfreg.P_AltPin |
| | Look Up Classes |
| | bwskfcls.p_sel_crse_search |
| | Change Class Options |
| | bwskfreg.P_ChangeCrseOpt |
| | Week at a Glance |
| | bwskfshd.P_CrseSchd |
| | Student Detail Schedule |
| | bwskfshd.P_CrseSchdDet1 |
| | Registration Fee Assessment |
| | bwskffee.P_FeeAsses |
| | Registration Status |
| | bwskrsta.P_RegsStatusDisp |

Student (bmenu.P_StuMainMnu)

Update Student Term Data

bwskxmis.p_studenttermdata

Active Registration

bwskreg.p_active_regs

Registration History

bwskhreg.p_reg_hist

Student Records

View your holds, grades and transcripts.

View Holds

bwskoacc.P_ViewHold

Midterm Grades

bwskmgrp.p_write_term_selection

Final Grades

bwskogrd.P_ViewGrde

Grade Detail

bwsksmrk.p_write_term_selection

Academic Transcript

bwskotrn.P_ViewTermTran

Request Academic Transcript

bwskwtrr.p_disp_transcript_address

View Status of Transcript Requests

bwskwtrr.p_disp_order_requests

Degree Evaluation

bwckcapp.P_Dispcurrent

Student (bmenu.P_StuMainMnu)

Course Catalog

bwskfcls.p_disp_dyn_ctlg

View Student Information

bwskgstu.P_StuInfo

Class Schedule

bwskfcls.p_disp_dyn_sched

Request Enrollment Verification

bwskrqst.p_disp_term_type

**View Status of Enrollment
Verification Requests**

bwskrqst.p_disp_request_dates

Student Account

View your account summaries,
statement/payment history and
tax information.

Account Summary

bwskoacc.P_ViewAcctTotal

Account Summary by Term

bwskoacc.P_ViewAcct

Account Detail for Term

bwskoacc.P_ViewAcctTerm

Statement and Payment History

bwsksphs.P_ViewStatement

Select Tax Year

bwtktxys.p_get_tax_year

Tax Notification

bwtktxns.p_disp_tax_notification

View Holds

bwskoacc.P_ViewHold



Modified Packages/Procedures/Functions

TWBKSLIB Package (twbksli1.sql, twbkslib.sql)

The *p_fetchroles* procedure of TWBKSLIB Package to was modified to include the *FINAID* role.

TWBKFRMT Package (twbkfrm1.sql)

The TWBKFRMT package was modified to treat Financial Aid as a separate module.

Modified Views

User Roles View (govrole.sql)

A new Financial Aid role indicator column was created by modifying an existing *f_finaid_applicant_ind* function.

A Student role indicator column was modified to only use the *f_student_gen_students_ind* function.

Required Data

Web Tailor User Role Validation Table Script (TWTVROLE)

A FINAID record was inserted into the TWTVROLE table.

| TWTVROLE_CODE | TWTVROLE_DESC | TWTVROLE_ACTIVITY_DATE | TWTVROLE_USER_DEFINED_IND |
|---------------|--------------------|------------------------|---------------------------|
| FINAID | Financial Aid user | SYSDATE | N |

Web Tailor Module Validation Table Script (TWTVMODU)

The description of *STU* module was updated from *Student Services & Financial Aid* to *Student Services*.



Note

The *RES* module already existed in the TWTVMODU table. ■

| TWTVMODU_CODE | TWTVMODU_DESC |
|---------------|------------------|
| RES | Financial Aid |
| STU | Student Services |

Web Tailor Main Web Page Settings Table Script (TWGBWMNU)

A new Financial Aid Main Menu (TWGBWMNU_NAME=bmenu.P_FinaidMainMnu) was created.

The existing Student Main Menu (TWGBWMNU_NAME=bmenu.P_StuMainMnu) was modified accordingly.

| Column name | Student record | Financial Aid record |
|-------------------------|--------------------|-----------------------|
| TWGBWMNU_NAME | bmenu.P_StuMainMnu | bmenu.P_FinaidMainMnu |
| TWGBWMNU_DESC | Student | Financial Aid |
| TWGBWMNU_PAGE_TITLE | Student | Financial Aid |
| TWGBWMNU_HEADER | Student | Financial Aid |
| TWGBWMNU_HEADER_IMAGE | | |
| TWGBWMNU_SUBTITLE_IMAGE | | |

| Column name | Student record | Financial Aid record |
|-------------------------------|-----------------------|-----------------------------|
| TWGBWMNU_TOP_RIGHT_IMAGE | TopRightBanner2000 | TopRightBanner2000 |
| TWGBWMNU_TOP_LEFT_IMAGE | TopLeftBanner2000 | TopLeftBanner2000 |
| TWGBWMNU_BULLET_IMAGE | | |
| TWGBWMNU_SEP_IMAGE | | |
| TWGBWMNU_L_MARGIN_WIDTH | 30 | 30 |
| TWGBWMNU_MAIN_TEXT_WIDTH | | |
| TWGBWMNU_R_MARGIN_WIDTH | 40 | 40 |
| TWGBWMNU_HELP_URL | | |
| TWGBWMNU_HELP_LINK | | |
| TWGBWMNU_HELP_IMAGE | | |
| TWGBWMNU_BGCOLOR | | |
| TWGBWMNU_BG_IMAGE | | |
| TWGBWMNU_COMMENT | | |
| TWGBWMNU_TEXT_COLOR | | |
| TWGBWMNU_LINK_COLOR | | |
| TWGBWMNU_ALINK_COLOR | | |
| TWGBWMNU_VLINK_COLOR | | |
| TWGBWMNU_BACK_URL | bmenu.P_MainMnu | bmenu.P_MainMnu |
| TWGBWMNU_BACK_LINK | Return to Menu | Return to Menu |
| TWGBWMNU_BACK_IMAGE | | |
| TWGBWMNU_BACK_MENU_IND | Y | Y |
| TWGBWMNU_MODULE | STU | RES |
| TWGBWMNU_ENABLED_IND | Y | Y |
| TWGBWMNU_INSECURE_ALLOWED_IND | N | N |
| TWGBWMNU_ACTIVITY_DATE | SYSDATE | SYSDATE |

| Column name | Student record | Financial Aid record |
|-------------------------|--------------------------|--------------------------|
| TWGBWMNU_CSS_URL | /css/web_defaultmenu.css | /css/web_defaultmenu.css |
| TWGBWMNU_MAP_TITLE | | |
| TWGBWMNU_CACHE_OVERRIDE | S | S |
| TWGBWMNU_EXIT_IMAGE | | |
| TWGBWMNU_MENU_IMAGE | | |
| TWGBWMNU_SOURCE_IND | B | B |
| TWGBWMNU_HELP_CSS | | |
| TWGBWMNU_ADM_ACCESS_IND | N | N |

Web Tailor Repeating Menu Item Table Script (TWGRMENU)

The Main Menu (TWGRMENU_NAME = 'bmenu.P_MainMnu') was modified to separate Student and Financial Aid.

The Menu items are now listed in the following order:

| Sequence | URL Text | URL | Description |
|----------|----------------------|---------------------|---|
| 1 | Personal Information | bmenu.P_GenMnu | Update addresses, contact information or marital status; review name or social security number change information; Change your PIN; Customize your directory profile. |
| 2 | Alumni and Friends | bmenu.P_AlumMnu | Find classmates, communicate, career advisor, job posting, online giving, volunteer. |
| 3 | Advancement Officers | bmenu.P_Dev_Off_Mnu | Search, contact information, call reports, review profiles, and giving history. |
| 4 | Student | bmenu.P_StuMainMnu | Apply for Admission, Register, View your academic records. |

| Sequence | URL Text | URL | Description |
|----------|-------------------------------|-----------------------|--|
| 5 | Financial Aid | bmenu.P_FinAidMainMnu | Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan applications. |
| 6 | Faculty and Advisors | bmenu.P_FacMainMnu | Enter Grades and Registration Overrides, View Class Lists and Student Information |
| 7 | Employee | pmenu.P_MainMnu | Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms, W4 data. |
| 8 | WebTailor Administration | bmenu.P_WebTailorMnu | Customize the Web pages for your institution; Update user roles. |
| 9 | WebCT.com, The e-Learning Hub | http://www.webct.com/ | Find online help, research tools, discussions, and more! |
| 10 | Finance | bmenu.P_FinanceMnu | Create or review financial documents, budget information, approvals. |

The Role-based top navigation bar for standalone mode (TWGRMENU_NAME = 'standalone_role_nav_bar') was modified to separate Student and Financial Aid. The standalone mode items are now listed in the following order:

| Sequence | URL Text | URL |
|----------|--------------------------|----------------------|
| 1 | Personal Information | bmenu.P_GenMnu |
| 2 | Alumni and Friends | bmenu.P_AlumMnu |
| 3 | Advancement Officers | bmenu.P_Dev_Off_Mnu |
| 4 | Student | bmenu.P_StuMainMnu |
| 5 | Faculty Services | bmenu.P_FacMainMnu |
| 6 | Employee | pmenu.P_MainMnu |
| 7 | WebTailor Administration | bmenu.P_WebTailorMnu |

| Sequence | URL Text | URL |
|----------|---------------|-----------------------|
| 8 | Finance | bmenu.P_FinanceMnu |
| 9 | Financial Aid | bmenu.P_FinAidMainMnu |

The following records were deleted from TWGRMENU:

| TWGRMENU_NAME | TWGRMENU_URL_TEXT | TWGRMENU_URL |
|------------------------|------------------------------|--------------------------|
| bwskoacc.P_ViewAcct | Overall Financial Aid Status | bwrksumm.P_Dispsumm |
| bwskoacc.P_ViewHold | Financial Aid Holds | bwrkhold.P_DispsHold |
| bwskotrnr.P_ViewTran | OverallFinancialAidStatus | bwrksumm.P_Dispsumm |
| bwrkhold.P_DispsHold | Academic Holds | bwskoacc.P_ViewHold |
| bwrkhold.P_DispsHold | Academic Transcript | bwskotrnr.P_ViewTermTran |
| bwrksaph.P_DispsSAP | Academic Transcript | bwskotrnr.P_ViewTermTran |
| bwrktrkr.P_DispsTrkMsg | Academic Transcript | bwskotrnr.P_ViewTermTran |
| bwrktrkr.P_DispsTrkReq | Academic Transcript | bwskotrnr.P_ViewTermTran |

Web Tailor Menu Roles Table Script (TWGRWMRL)

All Financial Aid pages and menus now use the assigned Financial Aid role (TWGRWMRL_ROLE=FINAID).

| TWGRWMRL_NAME | TWGRWMRL_ROLE |
|-----------------------|---------------|
| bmenu.P_FAASecMnu | FINAID |
| bmenu.P_FAAUnsecMnu | FINAID |
| bmenu.P_FAAwdMnu | FINAID |
| bmenu.P_FACostMnu | FINAID |
| bmenu.P_FAFFormsMnu | FINAID |
| bmenu.P_FinAidMainMnu | FINAID |
| bmenu.P_MainMnu | FINAID |

| TWGRWMRL_NAME | TWGRWMRL_ROLE |
|-----------------------------------|---------------|
| bwrkacpt.P_DispatchAcptAwdAidYear | FINAID |
| bwrkacpt.P_WebProcessAwards | FINAID |
| bwrkamsg.P_FAAppMsg | FINAID |
| bwrkbudg.P_DispatchBudg | FINAID |
| bwrkhold.P_DispatchHold | FINAID |
| bwrklhst.P_DispatchLoanHst | FINAID |
| bwrkolib.P_SelDefAidy | FINAID |
| bwrkolib.P_StoreAidy | FINAID |
| bwrkpays.P_DispatchPaySched | FINAID |
| bwrkrhst.P_DispatchAwdAidYear | FINAID |
| bwrkrhst.P_DispatchAwdHst | FINAID |
| bwrkrhst.P_DispatchAwdMsg | FINAID |
| bwrksaph.P_DispatchSAP | FINAID |
| bwrksumm.P_DispatchSumm | FINAID |
| bwrktivw.P_TitleIVDetail | FINAID |
| bwrktivw.P_TitleIVWithdraw | FINAID |
| bwrktmsg.P_DispatchTrkMsg | FINAID |
| bwrktrkr.P_DispatchTrkReq | FINAID |

Modified User Interface – Self-Service Web page

The product name on the following pages was changed from *STUWEB* to *RESWEB*.

- BWRKACPT Package (bwrkacpt1.sql, bwrkacpt.sql)
- BWRKAMSG Package (bwrkams1.sql, bwrkamsg.sql)
- BWRKBUDG Package (bwrkbud1.sql, bwrkbudg.sql)

- BWRKHOLD Package (bwrkhol1.sql, bwrkhold.sql)
- BWRKLHST Package (bwrklhs1.sql, bwrklhst.sql)
- BWRKLIST Package (bwrklis1.sql, bwrklist.sql)
- BWRKOLIB Package (bwrkoli1.sql, bwrkolib.sql)
- BWRKPAYS Package (bwrkpay1.sql, bwrkpays.sql)
- BWRKRHST Package (bwrkrhs1.sql, bwrkrhst.sql)
- BWRKSAPH Package (bwrksap1.sql, bwrksaph.sql)
- BWRKSUMM Package (bwrksum1.sql, bwrksumm.sql)
- BWRKTIVW Package (bwrktiv1.sql, bwrktivw.sql)

The following message now displays when a student selects *Withdrawal Information* from the menu and there are no student records:

- *No terms are available for Registration processing. You are not being processed for withdrawal.*
- BWRKTMSG Package (bwrktms1.sql, bwrktmsg.sql)
- BWRKTRKR Package (bwrktrk1.sql, bwrktrkr.sql)