

Banner Web General Release Guide

*Release 8.3
December 2009*



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Introduction

This guide documents Release 8.3 of the Banner Web General System. Release 8.3 includes enhancements and problem resolutions.

This document describes the following enhancements.

UI Modernization

The Banner Web General System Release 8.3 is available in the modernized UI introduced with Web Tailor 8.3.

Ethnicity and Race

The Ethnicity and Race survey is a solution for presenting a survey for Banner Self-Service users.

Payment Processor Connection

The Payment Processor Connection is a new solution for entering payment card information in Banner Self-Service applications.



1 User Interface Modernization - Functional



Overview

Banner Web General 8.3 introduces a new user interface (UI) option. You can switch between the new UI and existing UI.

Refer to the following documents for more details on UI modernization:

- *Banner Web Tailor 8.3 Release Guide*
- *Banner Web Tailor 8.3 User Guide*
- *Banner Middle Tier Implementation Guide Release 8.3*

Switching a User Interface

To select a user interface, perform the following steps:

1. Access WebTailor Administration.
2. Click **WebTailor Parameters** → **UI_Theme** → **Parameter Value**.
3. Select one of the following user interfaces:
 - *cascade* - the new UI introduced with this release
 - *default* - the classic Banner Self-Service UI
4. Save your changes.



2 Ethnicity and Race Enhancement - Functional



With this release, you can now present a survey to the following Self-Service users to obtain ethnicity and race information:

- Employees
- Students
- Faculty members and advisors
- LDAP users

If the survey parameters have been established, when a user successfully logs on to Self-Service, the survey will be presented and the user will have the option to complete the survey immediately or to complete it later. Once the user has completed the survey, it will no longer be presented to that user.

New survey pages are delivered with this release. The survey is displayed when all of the following conditions are met:

- The survey page is modified by adding a “remaining characters” count underneath the free form comments input area. Now text will be limited to the maximum of 2000 characters.
- The current date is in the date range specified on GTVSDAX. When you set up a date range on the Crosswalk Validation Form (GTVSDAX), the survey will be presented during the specified range. The start date of the survey is required, but the end date is not. Thus, if there is no end date and the current date is equal to or greater than the start date specified on GTVSDAX, the survey will be presented. If you do not set up a date range, the survey will not be presented.
- The **Ethnicity and Race Confirmed** check box on the relevant identification form is unchecked.

In addition to the survey pages, links have been added to the Personal Information menu so that users can view or update ethnicity and race information.

Tasks

Set Up the Ethnicity and Race Survey

The internal codes shown in the following table have been added to the Crosswalk Validation Form (GTVSDAX) to control the dates between which the ethnicity and race survey is presented to Self-Service users. If you do not enter values in the **Reporting Date** field for the *RESTARTDAT* internal code, the survey will not be presented.

External Code	Internal Code	Internal Code Group	Description	Reporting Date
NOT USED	RESTARTDAT	SSMREDATE	Race/Ethn Survey Start Date	first date the survey is to be displayed on the web
NOT USED	REENDDATE	SSMREDATE	Race/Ethn Survey Start Date	last date the survey is to be displayed on the web

1. Access the Crosswalk Validation Form (GTVSDAX).
2. Perform a query on the *SSMREDATE* internal code group.
3. (required) Enter the first date the survey is to be presented in the **Reporting Date** field for internal code *RESTARTDAT*.
4. (optional) Enter the last date the survey is to be presented in the **Reporting Date** field for internal code *REENDDATE*.
5. Save your changes.

New Web Pages

Update Ethnicity and Race (bwgkomre.P_RaceSurvey)

This page is used to collect ethnicity and race information via the survey. If the survey is active, when a user successfully logs on to Self-Service, the survey will be presented as long as the **Ethnicity and Race Confirmed** check box on the relevant Identification form remains unchecked for the user.

Web Page Fields

Item	Description/Source Information
Ethnicity	User's ethnicity. Values are <i>Hispanic or Latino</i> and <i>Not Hispanic or Latino</i> . Only one value can be checked. If a user checks both check boxes, the system displays an error message. If ethnicity information is already stored on the system, the relevant check box is checked.
Race	User's race(s). Multiple values can be selected. The column labels are the category descriptions associated with regulatory codes that are marked as system required on the Regulatory Race Validation Form (GTVRRAC), which are delivered by SunGard Higher Education. Each column displays the races associated with the race code on the Race Rules Form (GORRACE). If race information is already stored on the system, the relevant check box is checked.

Buttons/Icons on This Page

Button/Icon	Action
Continue	If information has been entered on the page, goes to the View Ethnicity and Race page (bwgkomre.P_RaceSurveyConfirm). If no check boxes are checked, goes to the Ethnicity and Race page (bwgkomre.P_RaceSurveyConfirm).
Ask Me Later	You can complete the survey on your next login.

Setup Requirements

Item	Description
Race Rules Form (GORRACE)	Associate at least one race with each high-level grouping. If you do not have one or more races associated with a grouping, the column name for the grouping will be displayed but there will be no check boxes listed below it.

Setup Requirements

Item	Description
Crosswalk Validation Form (GTVSDAX)	<p>For the survey to be displayed, enter the start date in the Reporting Date field for internal code <i>RESTARTDAT</i>.</p> <p>If you want the survey to be displayed only for a fixed date range, also enter the end date in the Reporting Date field for internal code <i>REENDDATE</i>. If you enter a start date but not an end date, the survey will always be presented.</p>
Information Text	<p>You can add additional informational text in Web Tailor, using the DEFAULT setting for the page.</p> <p>In addition, the following information text items are delivered:</p> <ul style="list-style-type: none">• <i>What is your ethnicity?</i>• <i>Select one or more races to indicate what you consider yourself to be.</i> <p>Although you can change the text to be displayed on the page, it is strongly recommended that US institutions keep these two text items exactly as delivered.</p>

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.

Web Menus With Links to This Page

No menus have links to this page.

View Ethnicity and Race (bwgkomre.P_RaceSurveyConfirm)

This page allows the user to review the race and ethnicity selections made via the survey. It can be accessed only from the Update Ethnicity and Race page (bwgkomre.P_RaceSurvey)

Web Page Fields

Item	Description/Source Information
Ethnicity	User's ethnicity. Values are <i>Hispanic or Latino</i> and <i>Not Hispanic or Latino</i> . Display only.
Race	User's race(s). Multiple values are displayed if more than one race has been specified by the user. Display only.

Buttons/Icons on This Page

Button/Icon	Action
Edit	Goes to the Update Ethnicity and Race page (bwgkomre.P_RaceSurvey).
Done	Saves the values to Banner and goes to the page defined in Web Tailor to be the first page presented. Note: Any previously saved ethnicity and race information is cleared and the records entered by the user are saved. If the user's record previously had race information associated with regulatory race codes other than those that are marked as system required on the Regulatory Race Validation Form (GTVRRAC), that information will be overwritten with the new values selected when this button is clicked.
Ask Me Later	You can resurvey on you next login.

Setup Requirements

This page has no setup requirements.

Updates to Banner

Item	Description
Ethnicity	Stored in the SPBPERS table.
Race	Stored in the GORPRAC table.

Links to Other Web Pages

This page does not have links to other pages.

Web Menus With Links to This Page

No menus have links to this page.

View Ethnicity and Race (bwgkomre.P_ViewEthnicityRace)

This page displays the user's ethnicity and race details. It includes a link to access the Update Ethnicity and Race page (bwgkomre.P_SelectEthnicityRace) so that the user can change these details. This page is accessed from the Personal Information menu.

Web Page Fields

Item	Description/Source Information
Ethnicity	User's ethnicity. Values are <i>Hispanic or Latino</i> or <i>Not Hispanic or Latino</i> . If the user's ethnic category has not been specified, no value is displayed. Display only.
Race	User's race(s). Multiple values are selected if more than one race has been specified by the user. The column labels are the category descriptions associated with regulatory codes that are marked as system required on the Regulatory Race Validation Form (GTVRRAC), which are delivered by SunGard Higher Education. Each column displays the races associated with the race code on the Race Rules Form (GORRACE).

Buttons/Icons on This Page

This page does not have buttons to other pages.

Setup Requirements

Item	Description
Regulatory Race Validation Form (GTVRRAC)	Define the high-level groupings for your races.
Race Rules Form (GORRACE)	Associate at least one race with each high-level grouping. If you do not have one or more races associated with a grouping, the column name for the grouping will be displayed but there will be no check boxes listed below it.

Updates to Banner

This page does not update information in the Banner database.

Links to Other Web Pages

This Link	Action
Update Ethnicity and Race	Goes to the Update Ethnicity and Race page (bwgkomre.P_SelectEthnicityRace)

Web Menus With Links to This Page

Personal Information Menu bmenu.P_GenMnu

Update Ethnicity and Race (bwgkomre.P_SelectEthnicityRace)

This page is used to enter or change a user's ethnicity and race details. It includes a link to access the View Ethnicity and Race page (bwgkomre.P_ViewEthnicityRace) so that the user can review the details. This page is accessed from the Personal Information menu.

Web Page Fields

Item	Description/Source Information
Ethnicity	User's ethnic category. Values are <i>Hispanic or Latino</i> and <i>Not Hispanic or Latino</i> .
Race	User's race(s). Multiple values can be selected. The column labels are the category descriptions associated with regulatory codes that are marked as system required on the Regulatory Race Validation Form (GTVRRAC), which are delivered by SunGard Higher Education. Each column displays the races associated with the race code on the Race Rules Form (GORRACE). If race information is already stored on the system, the relevant check box is checked.

Buttons/Icons on This Page

Button/Icon	Action
Continue	Saves the values to Banner and returns the user to the Personal Information menu.

Setup Requirements

Item	Description
Regulatory Race Validation Form (GTVRRAC)	Define the high-level groupings for your races.
Race Rules Form (GORRACE)	Associate at least one race with each high-level grouping. If you do not have one or more races associated with a grouping, the column name for the grouping will be displayed but there will be no check boxes listed below it.

Updates to Banner

Item	Description
Ethnicity	Stored in the SPBPERS table.
Race	Stored in the GORPRAC table.

Links to Other Web Pages

This Link	Action
View Ethnicity and Race	Goes to the View Ethnicity and Race page (bwgkomre.P_ViewEthnicityRace)

Web Menus With Links to This Page

Personal Information Menu `bmenu.P_GenMnu`

Changed Web Page

User Login (twbkwbis.P_WWWLogin)

When a user signs on, the system now determines whether the user needs to complete the ethnicity and race survey, and if so, displays the Update Ethnicity and Race page (bwgkomre.P_RaceSurvey) instead of the page defined in Web Tailor to be the first page presented. The survey is presented after any user security pages have been completed.

Note

This page is delivered with Web Tailor 8.1.1. ■

Obsolete Web Page

Ethnicity and Race (bwgkomre.P_RaceSurveyConfirm)

This page provides options to users who did not enter any information on the survey.

Web Page Fields

Item	Description/Source Information
Survey Response (untitled)	Radio button group for the user to specify a response to the survey. Choices are Edit and Ask Me Later .
Last Date to Respond	Date on which the survey ends, if the end date is entered on the Crosswalk Validation Form (GTVSDAX). If no date has been entered, this field is not displayed.

Buttons/Icons on This Page

Button/Icon	Action
Continue	Takes one of the following actions, depending on which radio button the user selected. <ul style="list-style-type: none">• If the user selected the Edit radio button, the system goes to the Update Ethnicity and Race page (bwgkomre.P_RaceSurvey).• If the user selected the Ask Me Later radio button, the system goes to the page defined in Web Tailor to be the first page presented.

Setup Requirements

This page has no setup requirements.

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.

Web Menus With Links to This Page

No menus have links to this page.

Changed Menu

The following links have been added to the Personal Information menu:

- **View Ethnicity and Race**
- **Update Ethnicity and Race**

3 Payment Processor Connection - Technical



Overview

The Payment Processor Connection is a new solution for entering payment card information for Banner Self-Service applications.

Please refer to the following documents for more information:

- *Banner Web General 8.3 Readme file*
- *Banner Web Tailor 8.3 Readme file*
- *Banner General Web Services Handbook*

Changed Packages

The following packages have been modified for this enhancement.

BWGKCCRD/BWCKCCR1

The `p_validation_display`, `p_collect_credit_card_info`, and `p_verify_credit_card_info` procedures have been removed.

The `p_acknowledgement_page` procedure has been modified to no longer use credit card number and expiration date information.

Obsolete Packages

The following packages are no longer used:

- BWGKCPAY/BWGKCPA1 - Script to support credit card payments through Self-Service
- BWGKEPAY/BWGKEPA1 - EPOS payment server

- BWGKIPAY/BWGKIPA1 - Oracle payment server
- BWGKJPAY/BWGKJPA1 - Java process
- BWGKTPAY/BWGKTPA1 - TouchNet payment gateway

4 Ethnicity and Race Enhancement - Technical



New Packages

The following packages have been added:

- bwgkomre.sql/bwgkomr1.sql
- bwgkorac.sql/bwgkora1.sql

New Scripts

The following scripts are delivered with Web General:

- gtvsdaxi_70301.sql inserts the required start and end date setup entries for the race and ethnicity survey into the GTVSDAX table.
- gtvrracu_70301.sql updates the Regulatory Race Validation Table (GTVRRAC) with a new description of race code 4. The description, previously *Native Hawaiian and Other Pacific Islander*, is changed to *Native Hawaiian or Other Pacific Islander*.
- bwgtwgbwmnui70301.sql inserts new Web Tailor TWGBWMNU data from the TWGBWMNU_INSTALL table imported (bwgmen70301.dmp) during the upgrade.
- bwgtwgrinfoi70301.sql inserts new Web Tailor TWGRINFO data from the TWGRINFO_INSTALL table imported (bwgmen70301.dmp) during the upgrade.
- bwgtwgrmenui70301.sql inserts new Web Tailor TWGRMENU data from the TWGRMENU_INSTALL table imported (bwgmen70301.dmp) during the upgrade.
- bwgtwgrmenuu70301.sql updates the TWGRMENU table.
- bwatwgrwmrli.sql inserts role records into TWGRWMRL associated with Multiple Race and Ethnicity for clients who license the Advancement Self-Service product.
- bwltwgrwmrli.sql inserts role records into TWGRWMRL associated with Multiple Race and Ethnicity for clients who license the Faculty and Advisor Self-Service product.

- `bwptwgrwmrli.sql` inserts role records into TWGRWMRL associated with Multiple Race and Ethnicity for clients who license the Employee Self-Service product.
- `bwrtwgrwmrli.sql` inserts role records into TWGRWMRL associated with Multiple Race and Ethnicity for clients who license the Financial Aid Self-Service product.
- `bwstwgrwmrli.sql` inserts role records into TWGRWMRL associated with Multiple Race and Ethnicity for clients who license the Student Self-Service product.

Seed Data

The following Web Tailor seed data is delivered with this release.

Web Tailor Data (TWGBWMNU)

The following table describes the seed data added for TWGBWMNU.

TWGBWMNU_NAME	TWGBWMNU_PAGE_TITLE
bwgkomre.P_RaceSurvey	Update Ethnicity and Race
bwgkomre.P_RaceSurveyConfirm	
bwgkomre.P_RaceSurveyOptions	Ethnicity and Race
bwgkomre.P_RaceSurveyOptionsSave	
bwgkomre.P_RaceSurveySave	
bwgkomre.P_RaceSurveySelection	View Ethnicity and Race
bwgkomre.P_SelectEthnicityRace	Update Ethnicity and Race
bwgkomre.P_UpdateEthnicityRace	Update Ethnicity and Race
bwgkomre.P_ViewEthnicityRace	View Ethnicity and Race

Web Tailor Roles Data (TWGRWMRL)

The following roles are assigned to each new TWGBWMNU entry:

- EMPLOYEE
- FACULTY
- FINAID
- STUDENT

Web Tailor Info Text Data (TWGRINFO)

Information and Help text are delivered for the new pages in the TWGRINFO table, as listed below.

Web Page	Type	Image
bwgkomre.P_RaceSurveyOptions	DEFAULT	web_info
bwgkomre.P_RaceSurveySelection	DEFAULT	web_info
bwgkomre.P_ViewEthnicityRace	DEFAULT	web_info
bwgkomre.P_RaceSurvey	HELP	
bwgkomre.P_RaceSurveyOptions	HELP	
bwgkomre.P_RaceSurveySelection	HELP	
bwgkomre.P_SelectEthnicityRace	HELP	
bwgkomre.P_ViewEthnicityRace	HELP	
bwgkomre.P_RaceSurvey	MRE_SURVEY1	web_info
bwgkomre.P_RaceSurvey	MRE_SURVEY2	web_info

Web Tailor Sub Menu Data (TWGRMENU)

Two new pages, **View Ethnicity and Race** and **Update Ethnicity and Race**, contain links to each other. In addition, the existing Personal Menu (bmenu.P_GenMnu) has been updated to include links to the same two new pages.

Web Page	Sequence Number	URL	New or Update
bwgkomre.P_ViewEthnicityRace	1	bwgkomre.P_SelectEthnicityRace	NEW
bwgkomre.P_SelectEthnicityRace	1	bwgkomre.P_ViewEthnicityRace	NEW
bmenu.P_GenMnu	10	bwgkomre.P_ViewEthnicityRace	NEW
bmenu.P_GenMnu	11	bwgkomre.P_SelectEthnicityRace	NEW



5 Problem Resolutions



This section lists a summary of the problem resolutions included in Release 8.3. For details about a problem resolution, refer to the *genweb80300resolutions.txt* file that accompanies this release.

Process/Object	Defect Number	Summary
bwgkccr1.sql	1-5ELE8U	Receipt page displays two \$ in front of gift amount in the bottom section of the receipt.
bwgkccrd.sql, bwgkccr1.sql,gokpven and gokpurl web tailor menu/info text	1-639ES5	PCI Compliance
bwgkoad1.sql	1-2YFWSI	Self-Service allows only a space character to be entered for the City field.
bwgkoprl.sql	1-50WOYW	Directory Profile page does not display confirmation message for changes.

