XE Student Self-Service Configuration Methods

Amanda Bland, Beth McCarter
University of Illinois
April 19, 2016
37510
Session rules of etiquette

• Please turn off your cell phone/pager

• If you must leave the session early, please do so as discreetly as possible

• Please avoid side conversation during the session

Thank you for your cooperation!
Introduction

Using Ellucian delivered methods we will walk you through how to tailor the XE Student self-service applications for your institution.

• Web Tailor options
• XE Configuration Files
• Information Text Editor (GUAINFO)
• Overall Page and Field Configuration (SOAWSCR)
Agenda

1. University of Illinois Overview
2. Security Configuration
3. XE Faculty Grade Entry Configuration
4. XE Student Advising Profile Configuration
5. XE Registration Configuration
University of Illinois Overview
University of Illinois

• Three campuses (Urbana-Champaign, Chicago, Springfield) www.uillinois.edu

  • Urbana-Champaign
    o 44K Students, 11K Employees

  • Chicago
    o 28K Students, 10K Employees

  • Springfield
    o 5K Students, 2K Employees
University of Illinois Banner Environment

• Live with Banner since 2001
• Production Banner database 1.6 TB
• 5.8 million SPRIDEN records
• Licensed for all modules except Alumni
• Multi-Campus VPD/MEP for Financial Aid, Academic History, Web Tailor, Course Catalog and Schedule
• FGAC used throughout Student and HR to segregate data by campus, college, department, etc..
AITS (Administrative Technology Services)

• Delivers **enterprise-wide IT solutions and services** in support of the mission critical functions of the University of Illinois. These functions include student services and financial aid, human resources and payroll, facilities, advancement, research administration, and finance.

• Has a presence at **all three campuses** and is the University-wide resource for computing, applications support, applications development, and data management in support of University business processes.

AITS

Save Time • Improve Ease of Use • Improve Speed to Service
Deliver Targeted and Pervasive Information • Collaborate
Banner XE timeline

June 2012
DBEU

September 2014
Faculty Grade Entry 9.2

November 2012
Catalog/Schedule 9.1

May 2015
Advising Profile 9.0
Events Mgmt 9.3

October 2015
Registration 9.2
Advising Profile 9.1
Student API 9.1.1
Catalog/Schedule 9.3
Student Overall 9.3

April 2016
Registration 9.3
Advising Profile 9.2
Fac Grade Entry 9.4.2
Student Overall 9.4
Student API 9.4
Academic History 9.1
Catalog/Schedule 9.4
Student SSB 9.2
Banner XE timeline

June 2012
DBEU

September 2014
Faculty Grade Entry 9.2

November 2012
Catalog/Schedule 9.1

May 2015
Advising Profile 9.0
Events Mgmt 9.3

October 2015
Registration 9.2
Advising Profile 9.1
Student API 9.1.1
Catalog/Schedule 9.3
Student Overall 9.3

April 2016
Registration 9.3
Advising Profile 9.2
Fac Grade Entry 9.4.2
Student Overall 9.4
Student API 9.4
Academic History 9.1
Catalog/Schedule 9.4
Student SSB 9.2
Security XE Application Configuration
Security Configuration

• We used security configuration to control how information displays to our students, faculty and advisors

  • Fine-Grained Access Control (FGAC)

  • Multi-Entity Processing (MEP)
Fine Grain Access Control Security

Fine-Grained Access Control (FGAC) is an Oracle feature that can be used to provide row-level security for Oracle tables. Banner® offers two optional data security features that take advantage of the capabilities of Oracle FGAC. These features are:

- Value-Based Security (VBS)
- Security for Personally Identifiable Information (PII)

More detailed information in Banner General Data Security Handbook
XE and Fine Grain Access Control

We used FGAC to limit term drop down lists in our XE Self-Service applications.
XE and Fine Grain Access Control
XE and Fine Grain Access Control
Multi-Entity Processing

- Multi-Entity Processing (MEP) allows multiple campuses or locations to share one single database to create a fully integrated multi-entity solution.
- In Banner, to implement MEP, the database is partitioned for the various campuses. On every table in BANNER is a security column (<table_name>_VPDI_CODE) in which the various campuses' IDs can be entered, based on your Institution's security demands.

More detailed information in Multi-Entity Processing Implementation Guide
XE and Multi-Entity Processing

- All of our XE applications are MEP enabled
- We have separate URLs for each MEP code Self-Service application
- We choose a MEP code when logging into XE Admin Pages
- We have MEP enabled the Web Tailor tables, GURINFO, SORWSDP and SORWSCR
# XE and Multi-Entity Processing

Select the MEP data you want to view:

<table>
<thead>
<tr>
<th>MEP Code</th>
<th>Description</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>1UUC</td>
<td>Univ of Ill at Urbana-Champaign</td>
<td></td>
</tr>
<tr>
<td>2UIC</td>
<td>Univ of Ill at Chicago</td>
<td></td>
</tr>
<tr>
<td>4UIS</td>
<td>Univ of Ill at Springfield</td>
<td></td>
</tr>
</tbody>
</table>
XE and Multi-Entity Processing
## XE and Multi-Entity Processing

<table>
<thead>
<tr>
<th>GURINFO_PAGE_NAME</th>
<th>GURINFO_LABEL</th>
<th>GURINFO_SEQUENCE_NUMBER</th>
<th>GURINFO_ROLE_CODE</th>
<th>GURINFO_TEXT</th>
<th>GURINFO_VPD1_CODE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVISEE_LISTING</td>
<td>advisee.listing.text</td>
<td>1</td>
<td>FACULTY</td>
<td>The Advisee List page contains overview information.</td>
<td>UIUC</td>
</tr>
<tr>
<td>ADVISEE_LISTING</td>
<td>advisee.listing.text</td>
<td>1</td>
<td>FACULTY</td>
<td>The Advisee List page contains overview information.</td>
<td>2UIC</td>
</tr>
<tr>
<td>ADVISEE_LISTING</td>
<td>advisee.listing.text</td>
<td>1</td>
<td>FACULTY</td>
<td>The Advisee List page contains overview information.</td>
<td>4UIS</td>
</tr>
</tbody>
</table>
Security Configurations Summary

• Using existing Banner Security methods, you can customize the display of XE applications

  • FGAC
  • MEP
XE Faculty Grade Entry Configuration
XE Faculty Grade Entry Configuration

• Implemented 9.2 version in September 2014
• Implementing 9.4.2 version in April 2016
• Configuration Items
  • Web Tailor
  • Configuration Files
  • CSS Files
  • SOAFACS
XE FGE: Web Tailor

The Info Text is contained in three labels for the Web Tailor procedure **FGE9**:
- GettingStartedTitle
- GettingStartedBody
- GettingStartedFooter

The Info text utilizes Markdown Language.
## XE FGE: Web Tailor

### Information text for: FGE9 (Infotext for Banner 9.0 Faculty Grade Entry)

<table>
<thead>
<tr>
<th>Copy Seq</th>
<th>Label</th>
<th>Source</th>
<th>Information Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GettingStartedBody</td>
<td>Baseline</td>
<td>Use this page to enter grades for the students in your courses. Only your courses which are open for grading are displayed. Monitor your grading progress by section using the status indicator bars. View your course and student details. Sort your Course List or Roster by clicking on column headers. Export and Import grades using the Tools Menu. More information about specific grade codes can be found on <a href="http://Registrar.Illinois.edu/Explanation-of-Grades">Explanation of Grades</a>. Tips for the new Faculty Grade Entry. Ensure you are on the correct tab for Midterm or Final Grade entry. Select each section/CNIN for which you intend to enter grades. The roster of students will appear at the bottom of the page and you can change the number of students displayed per page. NOTE: You may need to use the scrollbar to see all students. To enter grades, select a grade code from the pull-down list in the appropriate Grade column or use the Import Grades option located in the Tools menu (upper right hand corner). Use the Save button to submit the grades entered on the page. Monitor your grading progress by section/CNIN shown in the Grading Status Column (left most column in the list of sections/CNINs). Important Last Attend Date and hours attended info. The Last Attend Date and hours attended fields are required for students to whom you assign a Final Grade of F or U. Failure to enter Last Attend Date for an F or U grade will prevent that grade from being saved. The Course Dates are found in the Course Details tab once a section/CNIN has been selected. If a student has no history of attendance, enter the first day of the course in Last Attend Date and 0 (zero) in Hours Attended.</td>
</tr>
<tr>
<td>2</td>
<td>GettingStartedBody</td>
<td>Local</td>
<td>Student Confidential. If the <strong>Confidential</strong> message appears in the Student Details window, no/ her personal information is to be kept confidential. For more information on student confidentiality, please contact the Office of the Registrar.</td>
</tr>
</tbody>
</table>

### Reorder or Customize Information Text

- Select the associated label to update individual information text entry.

**Copy All Baseline entries to local**

**Add a New Information Text Entry**

**Customize the Associated Web Menu or Procedure**

**Select another set of Information Text to customize**
Markdown Language

- Markdown is a text-to-HTML conversion tool for web writers. Markdown allows you to write using an easy-to-read, easy-to-write plain text format, then convert it to structurally valid valid HTML.

Source: https://daringfireball.net/
Markdown Language

- All XE Self-Service applications use Markdown language
- Ellucian release guides and handbooks provide Markdown commands and syntax
- A Markdown limitation is the inability to open a hyperlink in a new window or tab
XE FGE: Configuration Files

- There are 2 Configuration Files
  - StudentFacultyGradeEntry_configuration
  - messages.properties

- The Configuration Files control field displays, certain section displays and messages
XE FGE: Configuration Files
XE FGE: CSS Files

- We did campus branding
- We hid items in FGE 9.2 version, but can now use extensibility
XE FGE: SOAFACS

- DISPLAYPROFILE controls whether a faculty member can access a student’s profile page
FGE Configuration Summary

• Configuration Items
  • Web Tailor
  • Configuration Files
  • CSS Files
  • SOAFACS
XE Student Advising Profile Configuration
Configuration/Security Methods

- Implemented 9.0 version in May 2015
- Implemented 9.1 version in October 2015
- Implementing 9.2 version in April 2016
- Configuration Items
  - GUAINFO
  - Configuration Files
  - CSS Files
XE SAP: GUAINFO

• Configurable items for XE SAP are found where Page Name is ADVISEELISTING, ADVISEESEARCH, or STUDENTPROFILE

• The text utilizes Markdown Language

• There are different types message. Each text message is categorized under one of the following message types:
  • N - Notifications
  • T - Tool tip
  • P - Panel
## XE SAP: GUAINFO

### Informational Messages

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Message Label</th>
<th>Source Indicator</th>
<th>Audience</th>
<th>Locale</th>
<th>Sequence Number</th>
<th>Text Type</th>
<th>Message</th>
<th>Start Date</th>
<th>End Date</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.head</td>
<td>Baseline</td>
<td>FACULTY</td>
<td>pt</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>&lt;STRONG&gt;Recherche de</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.head</td>
<td>Baseline</td>
<td>FACULTY</td>
<td>pt</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>&lt;STRONG&gt;Procurar</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.head</td>
<td>Local</td>
<td>FACULTY</td>
<td>en_US</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>&lt;STRONG&gt;Deve ser preenchida por</td>
<td>04/01/2015</td>
<td></td>
</tr>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.text</td>
<td>Baseline</td>
<td>FACULTY</td>
<td>ar</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>**************</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.text</td>
<td>Baseline</td>
<td>FACULTY</td>
<td>en_AU</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>Use the Advisee Search</td>
<td></td>
<td>descriptive help text</td>
</tr>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.text</td>
<td>Baseline</td>
<td>FACULTY</td>
<td>en_GB</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>Use the Advisee Search</td>
<td></td>
<td>descriptive help text</td>
</tr>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.text</td>
<td>Baseline</td>
<td>FACULTY</td>
<td>en_IE</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>Use the Advisee Search</td>
<td></td>
<td>descriptive help text</td>
</tr>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.text</td>
<td>Baseline</td>
<td>FACULTY</td>
<td>en_IN</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>Use the Advisee Search</td>
<td></td>
<td>descriptive help text</td>
</tr>
<tr>
<td>ADVISESEARCH</td>
<td>advise.search.text</td>
<td>Baseline</td>
<td>FACULTY</td>
<td>en_US</td>
<td>FACulty</td>
<td>1</td>
<td>Panel</td>
<td>Use the Advisee Search page to select the term for which you would like to search for a specific advisee to view their student profile information. You may also click View My Advisees Listing to see all advisees assigned to you in the selected term.</td>
<td></td>
<td>descriptive help text</td>
</tr>
</tbody>
</table>
XE SAP: Configuration Files

- Configuration Files
  - `bannerStudentAdvisorUI_configuration.properties`
  - 2 `messages.properties` files
  - `banner_configuration.groovy`

- Control items by role and by MEP code
XE SAP: Configuration Files

```
# Roster View Grid Column Names
student.advisor.column.name.student.name = Name and ID
student.advisor.column.name.student.status = Student Status
student.advisor.column.name.student.type = Student Type
student.advisor.column.name.student.advisor.primary = Primary Advisor
student.advisor.column.name.student.advisor.type = Advisor Type
student.advisor.column.name.student.program = Program
student.advisor.column.name.student.primary.major = Primary Major
student.advisor.column.name.student.class = Class
student.advisor.column.name.student.registered = Registered for Term

student.advisor.column.name.student.standing = Academic Standing
student.advisor.column.name.student.campus = Campus
student.advisor.column.name.student.study.level = Student Level

# To disable the display of an individual element, please place a # at the start of that
# individual element’s .view line to comment it out.
#
all.registeredcourses.maxHours.view=Profile
all.registeredcourses.minHours.roles=Advisor, AdvisorOverride, FacultyAdvisor, Student
```

XE SAP: Configuration Files
XE SAP: CSS Files

• We did campus branding
• We hid Menu and Home button
• We hid items/links on the left-hand side
XE SAP Configuration Summary

• Configuration Items
  • GUAINFO
  • Configuration Files
  • CSS Files
XE Registration Configuration
Configuration Methods

- Implemented 9.2 version in October 2015
- Implementing 9.3.0.2 version in April 2016
- Configuration Items
  - GUAINFO
  - SOAWSCR
  - Configuration Files
  - CSS Files
XE REG: GUAINFO

- Our GUAINFO is VPD/MEP
- Only 1 item to configure for Registration XE
<table>
<thead>
<tr>
<th>Display Number</th>
<th>Field Code</th>
<th>Field Name</th>
<th>Displayed</th>
<th>Baseline Display Text</th>
<th>Custom Display Text</th>
<th>Required</th>
<th>System Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>KEYWORDLIKE</td>
<td>Keyword (Partial Words)</td>
<td></td>
<td>Keyword</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>ATTRIBUTE</td>
<td>Attributes</td>
<td></td>
<td>Attribute</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>PARTOFTERM</td>
<td>Part Of Term</td>
<td></td>
<td>Part Of Term</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>COURSENUMBERRANGE</td>
<td>Course Number Range</td>
<td></td>
<td>Course Number Range</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>CREDITHOURRANGE</td>
<td>Credit Hour Range</td>
<td></td>
<td>Credit Hour Range</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>MEETINGDAYS</td>
<td>Meeting Days</td>
<td></td>
<td>Meeting Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>STARTTIME</td>
<td>Start Time</td>
<td></td>
<td>Start Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>ENDTIME</td>
<td>End Time</td>
<td></td>
<td>End Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>OPESECTIONS</td>
<td>Open Sections Only</td>
<td></td>
<td>Open Sections Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>KEYWORDDATA</td>
<td>Keyword (With All Words)</td>
<td></td>
<td>Keyword (With All Words)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>KEYWORDDANY</td>
<td>Keyword (With Any Words)</td>
<td></td>
<td>Keyword (With Any Words)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>KEYWORDEXACT</td>
<td>Keyword (Exact Phrase)</td>
<td></td>
<td>Keyword (Exact Phrase)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>KEYWORDWITHOUT</td>
<td>Keyword (Without The Word)</td>
<td></td>
<td>Keyword (Without The Word)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>LEVEL</td>
<td>Course Levels</td>
<td></td>
<td>Level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SCHEDULETYPE</td>
<td>Schedule Types</td>
<td></td>
<td>Schedule Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SESSION</td>
<td>Sessions</td>
<td></td>
<td>Sessions</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
XE REG: SOAWSCR
XE REG: SOAWSCR

• Configure items by persona, page and term
• Our SOAWSCR is VPD/MEP
• Copy functionality is handy
• We initially loaded this table into production via script
• The configuration allowed is similar to the configuration files but SOAWSCR provides a GUI interface
• Does not contain every single field displayed on a page
XE REG: Configuration Files

- We updated the text underneath the links on the Landing Page
- Can update other items that are not configurable in SOAWSCR
- Cannot hide fields
XE REG: Configuration Files

```properties
# - ------------------------------------------
#  +++ UI Labels +++
# - ------------------------------------------

browseClasses.bodyTitle=Browse Classes
registration.pageTitle=Registration
plan.pageTitle=Plan
selectPlan.pageTitle=Select Plan
registration.bodyTitle=Registration
registration.term.dropdown.selectOne=Select One...
registration.dropDown.selectAll=All

registration.whatLikeDo=What would you like to do?
registration.registerForClasses=Register for Classes
registration.registerForClasses.text=Search and register for your classes. You can also view and manage your schedule.
registration.worksheetPlanner=Plan Ahead
registration.worksheetPlanner.text=Give yourself a head start by building plans. When you're ready to register, you'll be able to load these plans.
registration.curriculumInfo=Details
registration.curriculumInfo.text=Stay on track for graduation by reviewing your degree requirements.
registration.classSearch=Browse Classes
registration.classSearch.text=Looking for classes? In this section you can browse classes that meet your degree requirements.
registration.registrationHistory=View Registration Information
registration.registrationHistory.text=View your past schedules and your ungraded classes.
registration.courseSearch=Browse Course Catalog
registration.courseSearch.text=Look up basic course information like subject, course and description.
registration.preRegActivities=text=View registration status, update student term data, and complete pre-registration requirements.
```
XE REG: Configuration Files

REGISTRATION

What would you like to do?

Prepare for Registration
View registration status, update student term data, and complete pre-registration requirements.

Register for Classes
Search and register for your classes. You can also view and manage your schedule.

Browse Classes
Looking for classes? In this section you can browse classes that meet your degree requirements.

View Registration Information
View your past schedules and your ungraded classes.
XE REG: CSS Files

• We did campus branding

• We hid Menu and Home button
XE REG: Configuration Summary

- Configuration Items
  - GUAINFO
  - SOAWSCR
  - Configuration Files
  - CSS Files
## Presentation Summary

<table>
<thead>
<tr>
<th>Field Labels</th>
<th>Text</th>
<th>Overall Display Items</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Grade Entry</td>
<td>Config Files</td>
<td>Web Tailor</td>
<td>CSS File</td>
</tr>
<tr>
<td>Student Advising Profile</td>
<td>Config Files</td>
<td>GUAINFO</td>
<td>CSS File</td>
</tr>
<tr>
<td>Registration</td>
<td>SOAWSCR, Config Files</td>
<td>GUAINFO</td>
<td>CSS File</td>
</tr>
</tbody>
</table>
Questions & Answers
Thank you!

Amanda Bland, amwood@uillinois.edu
Beth McCarter, emason@uillinois.edu

Please complete the online session evaluation form.
Session ID 37510
We need your help

Feedback Survey

Access session surveys by using the survey widget on the mobile app or by logging into your session schedule builder at

http://tinyurl.com/elive2016surveys

Amanda Bland, Beth McCarter

Session ID 37510