

**SUNGARD** HIGHER EDUCATION

# **BANNER WEB GENERAL USER GUIDE**

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December 2010

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# Contents

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<b>Chapter 1</b>	<b>Web General Overview</b> .....	<b>1-1</b>
	<b>Functions</b> . . . . .	<b>1-1</b>
	<b>Accessing Web General</b> . . . . .	<b>1-2</b>
<b>Chapter 2</b>	<b>Using Web General</b> .....	<b>2-1</b>
	<b>Surveys</b> . . . . .	<b>2-2</b>
	Answer a Survey . . . . .	2-2
	<b>Security</b> . . . . .	<b>2-2</b>
	Security Questions and Answers . . . . .	2-2
	Resetting Your PIN . . . . .	2-3
	Changing Your PIN . . . . .	2-4
	<b>Ethnicity and Race Survey</b> . . . . .	<b>2-5</b>
	Update Ethnicity and Race (Logon). . . . .	2-5
	View Ethnicity and Race (Logon) . . . . .	2-5
	Ethnicity and Race Options (Logon) . . . . .	2-5
	View Ethnicity and Race (Menu) . . . . .	2-6
	Update Ethnicity and Race (Menu) . . . . .	2-6
	<b>Personal Information</b> . . . . .	<b>2-7</b>
	View Addresses and Phones . . . . .	2-7
	Update Addresses and Phones . . . . .	2-7
	View E-mail Addresses. . . . .	2-9
	Update E-mail Addresses . . . . .	2-9
	Directory Profile . . . . .	2-10
	View Emergency Contacts . . . . .	2-11
	Update Emergency Contacts . . . . .	2-11

Update Marital Status . . . . .	2-12
Name Change Information . . . . .	2-13
Social Security Number Change Information . . . . .	2-13
Veteran Classifications . . . . .	2-14

**Chapter 3 Technical Reference.....3-1**

<b>Interaction with VBS . . . . .</b>	<b>3-1</b>
---------------------------------------	------------

<b>Showing or Hiding “International” Fields. . . . .</b>	<b>3-2</b>
--	------------

<b>Web Login Pages . . . . .</b>	<b>3-2</b>
----------------------------------	------------

User Login (twbkwbis.P_WWWLogin) . . . . .	3-3
Login Verification (twbkwbis.P_ValLogin) . . . . .	3-4
Terms of Usage (twbkwbis.P_UsagePage) . . . . .	3-8

<b>Personal Information Pages. . . . .</b>	<b>3-10</b>
--	-------------

Answer A Survey (bwgksrvy.P_ShowSurveys) . . . . .	3-11
Change Security Question (twbkwbis.P_SecurityQuestion) . . . . .	3-11
View Addresses and Phones (bwgkograd.P_SelectAtypView) . . . . .	3-12
Update Addresses and Phones - Select Address (bwgkograd.P_SelectAtypUpdate) . . . . .	3-15
Update Addresses and Phones - Update/Insert (bwgkograd.P_DisppAddrUpdate) . . . . .	3-18
View E-mail Addresses (bwgkograd.P_SelectEmailView) . . . . .	3-23
Update E-mail Addresses - Select Address (bwgkograd.P_SelectEmailUpdate) . . . . .	3-24
Update E-mail Addresses - Update/Insert (bwgkograd.P_DisppEmailUpdate) . . . . .	3-26
Directory Profile (bwgkoprf.P_ShowDiroltems) . . . . .	3-28
View Emergency Contacts (bwgkoemr.P_ViewEmrgContacts) . . . . .	3-33
Update Emergency Contacts - Select Contact (bwgkoemr.P_SelectEmrgContacts) . . . . .	3-33
Update Emergency Contacts (bwgkoemr.P_UpdateEmrgContacts) . . . . .	3-34
Update Marital Status (bwgkograd.P_SelectMtypUpdate) . . . . .	3-38
Name Change Information (bwgkoinf.P_DisppUpdName) . . . . .	3-39
Social Security Number Change Information (bwgkoinf.P_DisppUpdSSN) . . . . .	3-40
Change PIN (twbkwbis.P_ChangePin) . . . . .	3-42
Veteran Classifications (bwgkvets.P_DisppClass) . . . . .	3-43
User Logout (twbkwbis.P_Logout) . . . . .	3-45



- Ethnicity and Race Survey Pages . . . . . 3-45**
- Set Up the Ethnicity and Race Survey . . . . . 3-46
- Update Ethnicity and Race (bwgkomre.P\_RaceSurvey) . . . . . 3-47
- View Ethnicity and Race (bwgkomre.P\_RaceSurveyConfirm). . . . . 3-49
- Ethnicity and Race (bwgkomre.P\_RaceSurveyConfirm) . . . . . 3-50
- View Ethnicity and Race (bwgkomre.P\_ViewEthnicityRace). . . . . 3-51
- Update Ethnicity and Race (bwgkomre.P\_SelectEthnicityRace) . . . . . 3-52

- Chapter 4 Web General Packages . . . . . 4-1**
- Packages . . . . . 4-1**
- Credit Card Payment Processing. . . . . 4-1**
- Integration with Banner APIs . . . . . 4-2**
- Luminis Channels for Banner. . . . . 4-2**
- Index . . . . . I-1**



# 1 Web General Overview

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This chapter provides a summary of the functions of Banner Web General, and specifies how users access the system.

## Functions

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Banner Web General gives your users access to their personal information via the Internet. This allows them to maintain this information themselves, reducing the administrative work institution personnel have to do.

You can view and modify the following using Web General:

- Surveys (see page [2-2](#))
- Ethnicity and race information (see page [2-5](#))
- Addresses (see page [2-7](#))
- Telephone numbers (see page [2-7](#))
- E-mail addresses (see page [2-9](#))
- Directory profile (see page [2-10](#))
- Emergency contact information (see page [2-11](#))
- Marital status information (see page [2-12](#))
- Veterans Classification (see page [2-14](#))

Web General allows users to respond to surveys and determine the information that will be included in the campus directory.

Users cannot change their names or social security numbers directly through Web General, but Web General provides helpful information and a link to the Social Security Administration's web site.

Each of the features of Web General is described in detail in Chapter 2, "Using Web General."

# Accessing Web General

The Banner Self-Service applications provide two types of Web access, *non-secured* and *secured*. Users can access non-secured areas without needing to enter a user ID and PIN. Web General has secured access only - you must log on with an ID and PIN to access it.

To access Web General, select **Secure Area** from the home page.



- Enter Secure Area
- Prospective Students
- Apply for Admission
- General Financial Aid
- Campus Directory
- Class Schedule
- Course Catalog
- Alumni and Friends

The logon page appears, prompting you to enter your ID and PIN.

## Note

The PIN is case-sensitive. Depending on your institution's settings, the user ID may also be case-sensitive.



Please enter your User Identification Number (ID) and your Personal Identification Number (PIN). When finished, select Login.

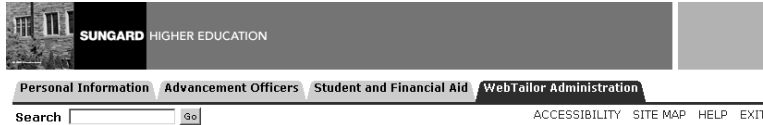
Please Note: ID is Case Sensitive

To protect your privacy, please Exit and close your browser when you are finished.

User ID:

PIN:

If they are valid, the Main Menu appears:



## Main Menu

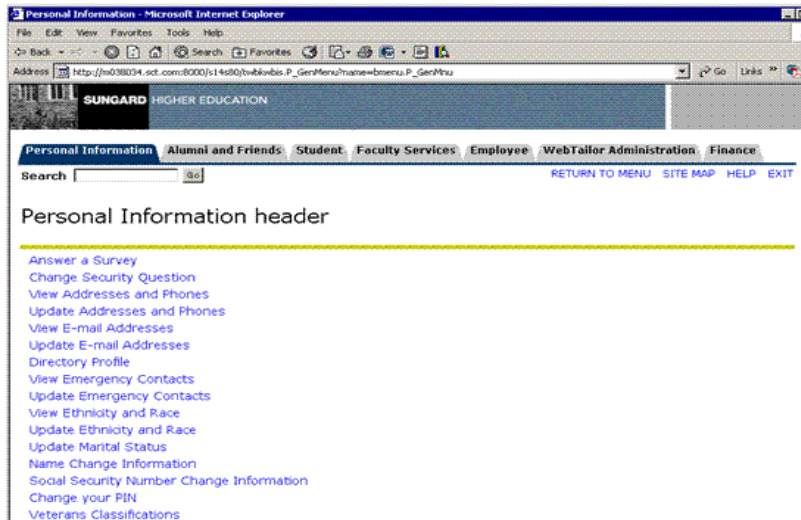
**Personal Information**  
Update addresses, contact information or marital status; review name or social security number change information; Change your PIN; Customize your directory profile.

**Advancement Officers**  
Search, contact information, call reports, review profiles, and giving history.

**Student and Financial Aid**  
Apply for Admission, Register, View your academic records and Financial Aid

WebCT.com, The e-Learning Hub  
Find online help, research tools, discussions, and more!

Select **Personal Information** from the menu or from the links at the top of the page. The Personal Information Menu page appears:



All of the Web General features are accessible through this page.



# 2 Using Web General

---



Web General is a SunGard® application that lets users maintain personal information. It also allows users to manage passwords and security questions, and to answer surveys that have been created in Banner General on the Survey Definitions Form (GUASVRY).

The **Personal Information** menu in Banner Self-Service provides access to Web General's features. See "Accessing Web General" in Chapter 1 for instructions on logging in and navigating to the Personal Information menu.

This chapter includes the following Web General pages and topics:

- ["Answer a Survey" on page 2-2](#)
- ["Security Questions and Answers" on page 2-2](#)
- ["Resetting Your PIN" on page 2-3](#)
- ["Changing Your PIN" on page 2-4](#)
- ["Ethnicity and Race Survey" on page 2-5](#)
- ["View Addresses and Phones" on page 2-7](#)
- ["Update Addresses and Phones" on page 2-7](#)
- ["View E-mail Addresses" on page 2-9](#)
- ["Update E-mail Addresses" on page 2-9](#)
- ["Directory Profile" on page 2-10](#)
- ["View Emergency Contacts" on page 2-11](#)
- ["Update Emergency Contacts" on page 2-11](#)
- ["Update Marital Status" on page 2-12](#)
- ["Name Change Information" on page 2-13](#)
- ["Social Security Number Change Information" on page 2-13](#)
- ["Veteran Classifications" on page 2-14](#)



# Surveys

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## Answer a Survey

This page lists all the surveys that have been sent to the user.

Select the survey you want to answer. The questions are listed, one after the other. The following buttons always appear while you are in the survey:

- **Next Question** - skips over the question and displays the next.
- **Finish Later** - saves all the answers you have provided and takes you out of the survey. This survey will still appear on your list of surveys that appears when you select Answer a Survey from the Web General Main Menu.
- **Survey Complete** - saves all the answers you have provided and removes the survey from your list of surveys. You cannot access the survey again or change any of the answers.
- **Remove Survey from List** - takes you out of the survey and removes it from your list of surveys. You cannot access it again.

As you go through the survey, you can enter text in the fields and select check boxes and radio buttons as appropriate.

When you reach the last question on the survey, the **Return to Beginning of Survey** button appears in place of the **Next Question** button. If you select it, the first survey question appears again and you can move through all the questions again, in order.

Surveys are saved whenever you select **Survey Complete** or **Finish Later**.

# Security

---

## Security Questions and Answers

The Banner Self-Service products use security questions and answers to help users who forget their passwords.

If you forget your Self-Service password, you can enter your ID and click **Forgot PIN?** to see and answer security questions that you previously set up. If you answer the questions correctly, your PIN will be reset and you will be able to access Self-Service.

You must set up security questions and answers:

- on your very first Self-Service login
- on your first login after your institution's security question policies change.

 **Note**

Users who access Self-Service through single sign-on (SSO) from Luminis® will not be required to set up security questions and answers and will not use Self-Service security questions to retrieve a lost PIN. ■

You can also choose to change your security questions by clicking the **Change Security Questions** link in Web General.

In any case, the process is the same. Even if you set up security questions previously, you start with a blank slate each time.

To set up security questions and answers:

1. Enter your PIN.
2. Select a pre-defined security question from the drop-down menu, or type your own question.

Depending on your institution's settings, you might not have the option to type your own question. In that case, just select one of the pre-defined security questions.

3. Type your answer to the question.
4. Repeat the process for the remaining security questions.

The number of questions is based on your institution's settings. You might have only one question to answer, or there might be several.

5. Click OK.

## Resetting Your PIN

If you forget your PIN, follow these steps to reset your PIN.

1. On the login page, enter your **User ID**.
2. Click **I Forgot My PIN**. A question and answer page displays, showing one or more of your previously saved security questions.

3. Type the answer to each of the questions, and click **OK**.

 **Note**

Your answers must exactly match the answers that you previously saved, except that case (upper case or lower case) does not matter, and white space (such as spaces between words) is ignored. ■

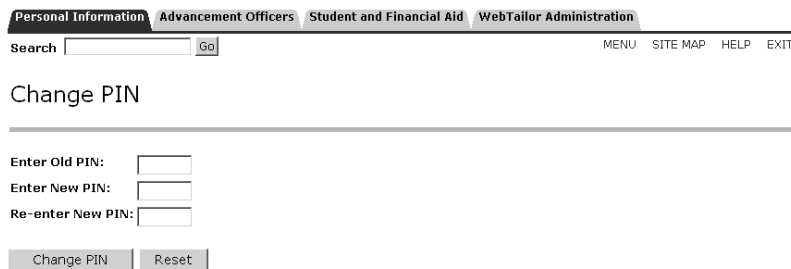
A PIN Reset page displays.

4. Type your new PIN, and type it again in the Confirm PIN field.
5. Click **OK**.

## Changing Your PIN

You can change your PIN in Web General, if you can remember the old PIN. If you cannot, you will need to contact your system administrator, who can reset your PIN in Banner using the Third Party Access Form (GOATPAC) or the Third Party Access Audit Form (GOATPAD).

To access this page, select **Change your PIN** from the Personal Information Menu.



Enter your old PIN, the new PIN, and the new PIN for a second time. Select **Change PIN**. Your PIN will be changed if all the following are true:

- The **Old PIN** you entered is your correct current PIN.
- Both instances of the new PIN are identical.
- The new PIN is a valid PIN, following the rules established for your institution.

# Ethnicity and Race Survey

---

You can present a survey to certain Self-Service users to obtain ethnicity and race information. The survey will be presented after the user's logon. For details on who will see the survey, see ["Ethnicity and Race Survey Pages" on page 3-45](#).

Normally, the ethnicity and race survey is presented during a limited time period, and each user must complete the survey only once during that period.

The user can also access the ethnicity and race survey from the Personal Information menu. The survey questions and options are the same regardless of whether it is presented at logon or accessed through the menu, but the user's navigational options are slightly different in the two versions of the survey.

## Update Ethnicity and Race (Logon)

This page asks the user to identify an ethnicity category (*Hispanic or Latino or Not Hispanic or Latino*) and one or more race categories from the options listed. The specific race categories are set up by the institution.

When finished the user can click the **Review** button to navigate to the View Ethnicity and Race page.

See below under "Update Ethnicity and Race (Menu)" for an example of the survey. The two versions of the survey page are similar to each other, except that the logon version has a **Review** button while the menu-accessed version has a link to navigate to *View Ethnicity and Race*.

## View Ethnicity and Race (Logon)

This page is presented after the user completes the race and ethnicity survey. The user can review selections made via the survey and choose to save them or to return to the Update Ethnicity and Race page to make changes.

## Ethnicity and Race Options (Logon)

This page is shown to a user who did not enter any information on the survey. The choices are **Edit**, which returns the user to the survey page, or **Ask Me Later**, which closes the survey so the user can proceed to the regular Self-Service menus.

## View Ethnicity and Race (Menu)

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

## Update Ethnicity and Race (Menu)

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

The specific race categories are set up by the institution, so your survey page will look different from this example.

Personal Information Alumni and Friends Financial Aid

Search  Go RETURN TO MENU SITE MAP HELP EXIT

### Update Ethnicity and Race

What is your ethnicity?

Hispanic or Latino  
 Not Hispanic or Latino

Select one or more races to indicate what you consider yourself to be.

American Indian or Alaska Native	Asian	Black or African American	Native Hawaiian or Other Pacific Islander	White
<input type="checkbox"/> *American Indian or Alaska Native	<input type="checkbox"/> Asian	<input type="checkbox"/> Black	<input type="checkbox"/> Hawaiian	<input type="checkbox"/> White
<input type="checkbox"/> Alaskan Native	<input type="checkbox"/> Asian Chinese	<input type="checkbox"/> Haitian	<input type="checkbox"/> Pacific Islander	<input type="checkbox"/> Caucasian
<input type="checkbox"/> Apache	<input type="checkbox"/> Asian Indian		<input type="checkbox"/> Polynesian	<input type="checkbox"/> European
<input type="checkbox"/> Blackfoot	<input type="checkbox"/> Asian Korean			<input type="checkbox"/> Scandinavian
<input type="checkbox"/> Cheyenne, Northern	<input type="checkbox"/> Asian Laos			
<input type="checkbox"/> Chippewa, Red Cliff	<input type="checkbox"/> Asian Thai			
<input type="checkbox"/> Choctaw				
<input type="checkbox"/> Crow				
<input type="checkbox"/> Delaware				
<input type="checkbox"/> Eskimo				
<input type="checkbox"/> Shawnee				

Submit

[ View Ethnicity and Race ]

# Personal Information

---

This section discusses the personal information details.

## View Addresses and Phones

This page allows users to view the telephone and address information that is on file for them in the Banner database. To access this page, select **View Addresses and Phones** from the Web General Main Menu.

Personal Information | Advancement Officers | Student and Financial Aid | WebTailor Administration

Search   RETURN TO MENU SITE MAP HELP EXIT

### View Addresses and Phones

Your active addresses are sorted by address type.

**Addresses and Phones**

Billing	Phones
Current: 11/01/2004 - (No end date) 123 Main Street Malvern, Pennsylvania 19355	Primary: 610-5551234

Business	Phones
Current: 11/01/2004 - (No end date) 123 Main Street Malvern, Pennsylvania 19355	Primary: 610-5551234

[ Update Addresses and Phones ]

The information is sorted by type. No inactive addresses or telephone numbers are displayed.

## Update Addresses and Phones

This page gives users the opportunity to add and change the address information stored in the Banner database.

To change address and telephone information:

1. Select **Update Addresses and Phones** from the Personal Information Menu or select the **Update Addresses and Phones** link at the bottom of the View Addresses and Phones page. The Update Addresses and Phones - Select Address page appears.
2. Select the link next to the address or phone number you want to change.
3. Enter your changes and select **Submit**.
4. If you want to add a new telephone number or address, select the type from the pull-down menu. Enter the new information and select **Submit**.

You can have only one active address for each type at one time. If you have one address become active while there is another of the same type that is active, the effective dates are automatically modified to make the first one inactive.

Additionally, any telephone number that you enter on this page is automatically associated with the specified address in Banner. If you make the address inactive in Banner at some point, the telephone number will also be automatically inactivated.


For more information on active and inactive addresses and telephone numbers, refer to the *Banner General User Guide*.

[Personal Information](#) | [Alumni and Friends](#) | [Financial Aid](#)

Search  

[RETURN TO MENU](#) | [SITE MAP](#) | [HELP](#) | [EXIT](#)

### Update Addresses and Phones - Update/Insert

 Required fields on address update or insert are Valid From This Date, Address Line 1, City, State or Province, and ZIP or Postal Code; all other fields are optional. If Nation is entered, only Address Line 1 and City are required. When updating an address you do not need to change the Valid From This Date value.

**Permanent**

Valid From This Date:MM/DD/YYYY   
 Until This Date:MM/DD/YYYY   
 House Number:   
 Address Line 1:   
 Address Line 2:   
 Address Line 3:   
 Address Line 4:   
 City:   
 State or Province:   
 ZIP or Postal Code:   
 County:   
 Nation:   
 Delete this Address:

**Primary Phone Number For This Address:**

Country Code	Area Code	Phone Number	Extension	Unlisted
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Phone Type	Country Code	Area Code	Phone Number	Ext.	Unlisted	Delete
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

---

[ View Addresses and Phones ]

Based on your institution's settings, certain fields on this page might be hidden. See ["Showing or Hiding "International" Fields" on page 3-2](#).

This page, as delivered, includes a link that, if clicked, opens the United States Post Office web site in a new browser window. You can select it to download change-of-address forms. For information on removing links, please refer to the *Banner Web Tailor User Guide*.

## View E-mail Addresses

This page allows users to view the e-mail information about them that is stored in the Banner database. To access this page, select **View E-mail Addresses** from the Personal Information Menu.

E-mail addresses are sorted alphabetically within each address type, with the preferred address appearing first. Each address that appears on the web will have the **Display on Web** check box selected on the E-mail Address Form (GOAEMAL) in Banner General.

**Personal Information** | Advancement Officers | Student and Financial Aid | WebTailor Administration

Search   RETURN TO MENU SITE MAP HELP EXIT

### View E-mail Addresses

Your active e-mail addresses are sorted by address type.

**E-mail Addresses**

<b>Home</b>	element121@yahoo.com	<b>Preferred</b>
<b>School</b>	marinad@westc.edu	

[ Update E-mail Addresses ]

## Update E-mail Addresses

This page allows users to maintain the e-mail information about them that is stored in the Banner database. To access this page, select **Update E-mail Addresses** from the Personal Information Menu.

**Personal Information** | Advancement Officers | Student and Financial Aid | WebTailor Administration

Search   RETURN TO MENU SITE MAP HELP EXIT

### Update E-mail Addresses - Update/Insert

E-mail must be entered for an e-mail address update or insert; all other fields are optional. You may specify only one preferred e-mail address.

**Home**

E-mail:

Comment:

Delete this address:

**Preferred Home**

element121@yahoo.com

Select a Different E-mail Address to Update

[ View E-mail Addresses ]

You can choose which types of addresses are displayed in the **Type of E-mail to Insert** pull-down menu by selecting **Web Ind** on the E-Mail Address Type Validation Form (GTVEMAL) in Banner General. For details, refer to the *Banner General User Guide*.

## Directory Profile

Users can specify the personal information that will appear in their campus directory profile.

Select **Directory Profile** from the Personal Information Menu.

Directory Item	Current Listing	Display in Directory
Name :	Marin Adley	Yes
Permanent Address :	Not Reported	<input checked="" type="checkbox"/>
Permanent Telephone :	Not Reported	<input checked="" type="checkbox"/>
Campus Address :	Not Reported	<input checked="" type="checkbox"/>
Campus Telephone :	Not Reported	<input checked="" type="checkbox"/>
Fax Number :	Not Reported	<input checked="" type="checkbox"/>
College Affiliation :	College of Arts & Sciences	<input checked="" type="checkbox"/>
E-mail Type and Address :	PREFERRED Home - element121@yahoo.com	<input checked="" type="checkbox"/>
Maiden Name :	Not Reported	<input checked="" type="checkbox"/>
Home Address :	Not Reported	<input checked="" type="checkbox"/>
Home Telephone :	Not Reported	<input checked="" type="checkbox"/>
Business Address :	123 Main Street Malvern, PA 19355	<input checked="" type="checkbox"/>
Business Telephone :	610-5551234	<input checked="" type="checkbox"/>
Class Year :	Not Reported	<input type="checkbox"/>
Preferred College :	Not Reported	<input type="checkbox"/>

[ Update Addresses and Phones | Name Change Information | Update E-mail Addresses ]

Select **Display in Directory** for all the pieces of information that should be included in your Directory Profile.

### Note

Administrators can refer to Chapter 7, “Campus Directory,” of the *Banner Employee Self-Service User Guide* for information on how to set up the Campus Directory. ■

## View Emergency Contacts

This page lets you view information about your emergency contacts, the people who should be notified in the event of an emergency. To access this page, select **View Emergency Contacts** from the Personal Information Menu. You can select the **Update Emergency Contacts** link to change the information or add another emergency contact.

Personal Information   Advancement Officers   Student and Financial Aid   WebTailor Administration

Search  Go   RETURN TO MENU   SITE MAP   HELP   EXIT

### View Emergency Contacts

---

*Emergency Contacts*

Order Name	Address and Phone	Relationship
1	Denny Adley 123 Main Street Malvern, PA 19355 610-5551234	Father

---

[ Update Emergency Contacts ]

## Update Emergency Contacts

This page lets you update the emergency contact information in the Banner database. To access this page, select **Update Emergency Contacts** from the Personal Information Menu.

Your contacts are listed. Select the name of the contact to be updated, or select **New Contact** to add a contact. Enter or change the information about the contact. To change the order in which the contacts are listed, modify the number in the **Order** field.

When you have finished, select **Submit** to save your changes.

## Update Emergency Contacts

Complete your emergency contact information update and Submit Changes.

Remove Contact:

Order:

Relationship:

First Name:

Middle Name:

Last Name Prefix:

Last Name:

House Number:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

City:

State or Province:

ZIP or Postal Code:

Country:

Telephone: 

Country Code	Area Code	Phone Number	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[ [View Emergency Contacts](#) ]

Based on your institution's settings, certain fields on this page might be hidden. See ["Showing or Hiding "International" Fields" on page 3-2.](#)

## Update Marital Status

To modify your marital status information, select Update Marital Status from the Personal Information Menu.

## Update Marital Status

Update your marital status from the pull-down list and Submit Changes.

Marital Status:

### Note

The statuses on the pull-down menu come from the Marital Status Code Validation Form (STVMRTL) in Banner. ■

Make your changes, then select **Update Marital Status**. If you select **Reset**, your change will not be saved.

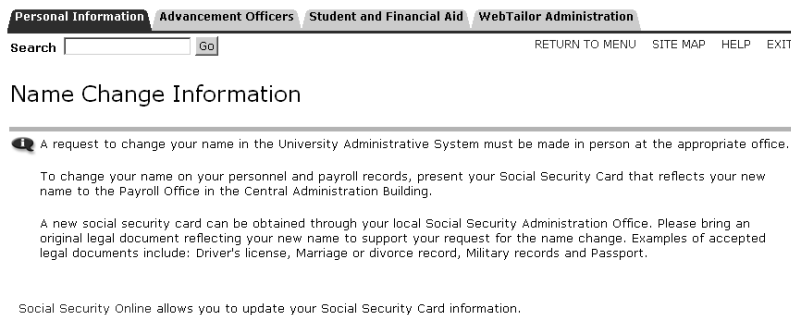
## Name Change Information




This page, as delivered, is designed for institutions in the United States. ■

You cannot change your name using Web General. You must make your request in person, and at the appropriate office. You can, however, find information about how to change your name by selecting **Name Change Information** from the Personal Information Menu.

This page includes a link that, if clicked, opens the Social Security Administration's web site in a new browser window.



The screenshot shows a navigation menu with the following items: Personal Information, Advancement Officers, Student and Financial Aid, and WebTailor Administration. Below the menu is a search bar with a 'Go' button and links for RETURN TO MENU, SITE MAP, HELP, and EXIT. The main content area is titled 'Name Change Information' and contains the following text:

 A request to change your name in the University Administrative System must be made in person at the appropriate office.

To change your name on your personnel and payroll records, present your Social Security Card that reflects your new name to the Payroll Office in the Central Administration Building.

A new social security card can be obtained through your local Social Security Administration Office. Please bring an original legal document reflecting your new name to support your request for the name change. Examples of accepted legal documents include: Driver's license, Marriage or divorce record, Military records and Passport.

[Social Security Online allows you to update your Social Security Card information.](#)

## Social Security Number Change Information



This page, as delivered, is designed for institutions in the United States. ■

You cannot change your social security number using Web General. You must make your request in person, and at the appropriate office. You can, however, find information about changing your social security number by selecting **Social Security Number Change Information** from the Personal Information Menu.

This page includes a link that, if clicked, opens the Social Security Administration's web site in a new browser window.

## Social Security Number Change Information

**i** A request to change your social security number in the University Administrative System must be made in person at the appropriate office.

In order to change either your name or social security number on your personnel and payroll records, you must present your Social Security Card that reflects your new name to the Payroll Office in the Central Administration Building.

Apply for a new Social Security Card through your local Social Security Administration Office. Please bring an original legal document that reflects your correct social security number to the Payroll Office in the Central Administration Building. Examples of accepted legal documents include: Driver's license, Marriage or divorce record, Military records and Passport.

Social Security Online allows you to update Social Security Card information.

## Veteran Classifications

The Veteran Classifications page is used to report the following Veteran information:

- Veteran Separation Date
- Disabled Veteran
- Veteran of the Vietnam Era
- Armed Forces Service Medal Veteran
- Other Protected Veteran

This page allows you to enter the Military Separation Date and select any of the Veteran Classification options which apply to you. Use the following steps to report Veteran Classifications:

1. Enter the military separation date in the **Military Separation Date** field. (required)
2. Select the desired veterans classifications check boxes that are applicable to you.
3. Click **Submit**.

# 3 Technical Reference

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This chapter presents technical information about the Web pages in Banner Web General. The following topics are included:

- [“Interaction with VBS” on page 3-1](#)
- [“Showing or Hiding “International” Fields” on page 3-2](#)
- [“Web Login Pages” on page 3-2](#)
- [“Personal Information Pages” on page 3-10](#)
- [“Ethnicity and Race Survey Pages” on page 3-45](#)

Each page’s description includes:

- A brief functional overview
- The source(s) of the information on the page
- The implications of updates to Banner made via the page
- The links to and from other pages and menus in Banner Web
- The diagnostic messages which may be generated from users’ actions
- A list of any SunGard®-delivered information text that will need to be carefully reviewed by the institution during implementation

## Note

Diagnostic message or Info Text information does not appear for any pages that do not generate a diagnostic message or require a review of Info Text. ■

The delivered page header information and Info Text in Web General have been written to be generic for all of the Banner Self-Service products. If you have not licensed all of them, be sure to review the page header information and Info Text and tailor them to reflect the products at your institution.

## Interaction with VBS

---

The Value-Based Security (VBS) and Personally Identifiable Information (PII) feature uses Oracle’s Fine-Grained Access Control (FGAC) tool. This feature enables you to restrict user access to institutional data and personal information according to your institution’s business rules and the scope of user job requirements.

VBS allows you to restrict access to what users can see and update on various Web pages. You must set up the restrictions in Banner General. For more information, please refer to the *Banner Data Security Handbook*.

## Showing or Hiding “International” Fields

---

Four person information fields were added with Web General 8.2 in support of international formats for names, telephones, and addresses:

- **House Number** (\_HOUSE\_NUMBER)
- **Street Line 4** (\_STREET\_LINE\_4)
- **Telephone Country Code** (\_CTRY\_CODE\_PHONE)
- **Last Name Prefix** (\_SURNAME\_PREFIX)

Because most Banner customers were expected to choose not to use these four fields, masking rules were delivered to hide these fields by default. You can show or hide these fields by doing either of the following:

- Running the gssmask.sql script.
- Changing the masking rules for these fields in the Data Display Mask Rules form (GORDMSK). A special object named \*\*SSB\_MASKING is used for the purpose of applying GORDMSK masking rules to these four fields in Self-Service (and also the **International Access Telephone** field).

For detailed instructions, see “Masking International Person Information Fields” in Chapter 4 of the *Banner General Data Security Handbook*.

## Web Login Pages

---

This section includes the following topics:

- [“User Login \(twbkwbis.P WWWLogin\)” on page 3-3](#)
- [“Login Verification \(twbkwbis.P ValLogin\)” on page 3-4](#)
- [“Terms of Usage \(twbkwbis.P UsagePage\)” on page 3-8](#)

The information stored in the Banner database and presented to the users in Web General is highly confidential. Therefore, users must log into the Secure Area to view and update it.

The programming logic that controls user IDs and PINs for all the Banner Self-Service products exists in Banner General and Banner Web General.

 **Note**

Institutional preferences for PINs and Security Questions and Answers are set on Banner General's GUAPPRF form. See Banner Online Help for details of the settings that can be made in GUAPPRF. ■

All the user IDs and PINs are stored in the GOBT PAC table in Banner General and can be maintained using the Third Party Access Form (GOATPAC) or the Third Party Access Audit Form (GOATPAD). Web General uses this information to authenticate web users.

The very first time a user successfully logs into the Secure Area, the system presents a Security Question/Answer page. The user must define one or more security question for which only they have the answer. These questions and answers can help the user to re-establish his PIN without bothering your institution's web master, so your administration needs fewer people involved with PIN maintenance, resulting in better overall PIN security. See ["Change Security Question \(twbkwbis.P\\_SecurityQuestion\)" on page 3-11](#).

If the institution has set up the ethnicity and race survey feature and if an active survey is in progress, a user may be presented with an ethnicity and race survey after logon. When a user logs on, the system 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). The survey is presented after any user security pages have been completed. See ["Ethnicity and Race Survey Pages" on page 3-45](#).

## User Login (twbkwbis.P\_WWWLogin)

A user enters his Banner ID and current PIN. As the PIN is entered, the Web page displays asterisks (\*\*\*\*\*) to protect the privacy of the information.

### Web Page Fields

Item	Description/Source Information
ID	The user's current or any previous ID that is displayed in the Identification Form (SPAIDEN).
PIN	<b>PIN</b> field on the GOATPAC or GOATPAD form in Banner General.
Disabled Indicator	<b>Disabled Indicator</b> on the GOATPAC or GOATPAD form. If this is selected ( <i>Yes</i> in the database), the user is not allowed to login to the Web. To allow Web access, the check box should be cleared.

## Web Page Fields

Item	Description/Source Information
Login Attempts	How many times the user has entered an invalid ID and PIN combination. The <code>twgbwrul_login_attempts</code> column of the Web Rules Table (TWGBWRUL) holds the maximum number of unsuccessful login attempts before the PIN is disabled. To enter this maximum, select <b>Web Rules</b> from the Web Tailor Menu.
PIN Expiration	<b>PIN Expirations</b> are an optional Web feature. If implemented, PIN expiration dates can use an auto-expiration feature for all users. PIN expiration dates for specific users can be entered in the <b>Expiration Date</b> field on the Third Party Access Form (GOATPAC). To auto-expire PINs for all user accounts with PIN Expiration Dates, enter a value in <b>PIN Expiration Days</b> on the Web Rules page in Web Tailor.

## Buttons/Icons on This Page

Button/Icon	Action
Login	Goes to the Main Menu ( <code>twbkwbis.P_GenMenu</code> ).
Forgot PIN?	Goes to the Security Answer page ( <code>twbkwbis.P_ValLogin</code> ).

## Login Verification (`twbkwbis.P_ValLogin`)

This page is displayed if the user ID and/or password you entered on the User Login (`twbkwbis.P_WWLogin`) page was incorrect.

## Web Page Fields

Item	Description/Source Information
ID	The user's current or any previous ID that is displayed in the Identification Form (SPAIDEN).
PIN	<b>PIN</b> field on the GOATPAC or GOATPAD form in Banner General.

## Web Page Fields

<b>Item</b>	<b>Description/Source Information</b>
Disabled Indicator	<b>Disabled Indicator</b> on the GOATPAC or GOATPAD form. If this is selected ( <i>Yes</i> in the database), the user is not allowed to login to the Web. To allow Web access, the check box should be cleared.
Login Attempts	How many times the user has entered an invalid ID and PIN combination. The <code>twgbwrul_login_attempts</code> column of the Web Rules Table (TWGBWRUL) holds the maximum number of unsuccessful login attempts before the PIN is disabled. To enter this maximum, select <b>Web Rules</b> from the Web Tailor Menu.
PIN Expiration	<b>PIN Expirations</b> are an optional Web feature. If implemented, PIN expiration dates can use an auto-expiration feature for all users. PIN expiration dates for specific users can be entered in the <b>Expiration Date</b> field on the GOATPAC or GOATPAD form. To auto-expire PINs for all user accounts with PIN Expiration Dates, enter a value in <b>PIN Expiration Days</b> on the Web Rules page in Web Tailor.

## Updates to Banner

<b>Item</b>	<b>Description</b>
Last Web Access	From the <b>Last Web Access</b> field on the GOATPAC or GOATPAD form. This field displays the Last Web Access date and time display on the Login Verification page after the user enters a valid ID and PIN.

## Buttons/Icons on This Page

<b>Button/Icon</b>	<b>Action</b>
Login	Goes to the Main Menu ( <code>twbkwbis.P_GenMenu</code> ).
Forgot PIN?	Goes to the Security Answer page ( <code>twbkwbis.P_ValLogin</code> ).

## Web Page Fatal/Warning Error Messages

**Message:** *PIN must be <value> digits long.*

**Source:** twbkwb11.sql  
Procedure twbkwbis.P\_ValidateChangePin  
(referenced function is twbkglib.F\_PinLength)

**Action:** End user or administrative action required. User did not enter the required number of digits in the PIN field.

---

**Message:** *Your PIN has expired. Please change it now.*

**Source:** twbkwb11.sql  
Procedure twbkwbis.P\_ValLogin

**Action:** End user or administrative action required. PIN Expiration Date specified on GOATPAC and GOATPAD for the end user has been reached. End user must enter a new PIN which is different from the previous PIN; or an authorized administrative user can make the expiration date null or change it to a future date.

---

**Message:** *Your PIN will expire in <value> day(s). You may change it now, or enter your PIN in the Re-enter Old PIN field and select Login.*

**Source:** twbkwb11.sql  
Procedure twbkwbis.P\_ValLogin

**Action:** End user or administrative action required. PIN Expiration Date specified on GOATPAC and GOATPAD for the end user occurs in the number of days specified. End user may change PIN now or continue with current PIN.

---

**Message:** *New PIN must be different from existing PIN!*

**Source:** twbklib1.sql  
referenced by twbkwbis.P\_ValidateChangePin

**Action:** End user or administrative action required. End user attempted to change his PIN by specifying the current PIN as the new PIN. This is not permitted. End user must enter a PIN that is different from the current PIN.

---

**Message:** *Authorization Failure - Invalid User ID or PIN.*

**Source:** twbkwb11.sql  
Procedure twbkwbis.P\_ValLogin

**Action:** End user or administrative action required. End user entered an invalid ID and PIN combination. Additional attempts to enter a valid ID and PIN combination will be permitted until the number of Login Attempts specified on the Web Rules Form is reached (equal to the value of Login Attempts).

---

**Message:** *You are not authorized to login. If you are an employee please contact the Human Resources Department. Students should contact the Student Records Department.*

**Source:** twbkwb11.sql  
Procedure twbkwbis.P\_ValLogin  
Information Text for Label: *DEAD, Sequence 1*

**Action:** End user or administrative action required. ID and PIN combination is valid, but the person is marked *Deceased* on the General Person Form (SPAPERS). Administrative investigation and review should be undertaken as appropriate.

---

**Message:** *Your Web Access has been disabled. Please contact the Computing and Information Services Office for information about your account.*

**Source:** twbkwb11.sql  
Procedure twbkwbis.P\_ValLogin  
Information Text for Label: *DISABLE, Sequence 1*

**Action:** End user or administrative action required. End user's Web access has been disabled due to reaching the number of invalid login attempts specified on the Web Rules page in Web Tailor.

---

**Message:** *You are not authorized to use the Web Information Systems. Please contact the Student Records Office for more information.*

**Source:** twbkwb11.sql  
Procedure twbkwbis.P\_ValLogin  
Information Text for Label: *NOTAUTH, Sequence 1*

**Action:** End user or administrative action required. End user does not have a valid Self-Service user role (such as EMPLOYEE, FACULTY, STUDENT, for example). Administrative investigation and review should be undertaken as appropriate.

---

## Information and Help Text

	Description
twbkwbis.P_ValLogin Label: DEAD Sequence: 1	Text includes reference to Human Resources Department and Student Records Department.
twbkwbis.P_ValLogin Label: DISABLE Sequence: 1	Text includes reference to Computing and Information Services Office.
twbkwbis.P_ValLogin Label: NOTAUTH Sequence: 1	Text includes reference to Student Records Office.

## Terms of Usage (twbkwbis.P\_UsagePage)

The Terms of Usage page appears after the first Web login *only* if the **Usage Accepted Indicator** is cleared (set to *No*) on the Third Party Access Audit Form (GOATPAD) in Banner General, and the **Display Usage Page Indicator** is selected (set to *Yes*) on the Web Rules page in the Web Tailor table (TWGBWRUL) table. The end user must select either **Exit** or **Continue**:

- Selecting **Exit** will display the User Logout page, stopping further access to information on the Web.
- Selecting **Continue** will display the Main Menu.

The page is intended to communicate institution-specific policies regarding secured access to Banner Self-Service information, and the end user's responsibilities for updates made to that information.

If institutional policies change, or if new information needs to be communicated through this page, change the associated Info Text and perform a global update to set the

gobtpac\_usage\_accept\_ind to *N* in the database. The Terms of Usage page will reappear the next time the user logs on.

## Web Page Fields

Item	Description/Source Information
Display Usage Page Indicator	From the Web Rules page in the Web Tailor. If this is selected (set to <i>Yes</i> ), the Terms of Usage will display the first time all users log on to the Web.
Usage Accepted Indicator	From the Third Party Access Audit Form (GOATPAD) in Banner General. All new records created on this form default this indicator to cleared (set to <i>No</i> ), which will cause the Terms of Usage page to appear the first time the user logs on.

## Updates to Banner

Item	Description
Usage Accepted Indicator	If the user clicks on the <b>Continue</b> button, the <b>Usage Accepted Indicator</b> in GOATPAD will be updated to selected (set to <i>Yes</i> ).

## Buttons/Icons on This Page

Button/Icon	Action
Exit	Displays the User Logout page.
Continue	Returns to the Main menu.

## Information and Help Text

twbkwbis.P_UsagePage Label: DEFAULT Sequences 1 and 2	Review all text and edit to reflect institution-specific policies and user responsibilities regarding use of the Banner Self-Service information system.
---	--

# Personal Information Pages

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This section includes the following topics:

- [“Answer A Survey \(bwgksrvy.P ShowSurveys\)” on page 3-11](#)
- [“Change Security Question \(twbkwbis.P SecurityQuestion\)” on page 3-11](#)
- [“View Addresses and Phones \(bwgkogad.P SelectAtypView\)” on page 3-12](#)
- [“Update Addresses and Phones - Select Address \(bwgkogad.P SelectAtypUpdate\)” on page 3-15](#)
- [“Update Addresses and Phones - Update/Insert \(bwgkogad.P DispAddrUpdate\)” on page 3-18](#)
- [“View E-mail Addresses \(bwgkogad.P SelectEmalView\)” on page 3-23](#)
- [“Update E-mail Addresses - Select Address \(bwgkogad.P SelectEmalUpdate\)” on page 3-24](#)
- [“Update E-mail Addresses - Update/Insert \(bwgkogad.P DispEmailUpdate\)” on page 3-26](#)
- [“Directory Profile \(bwgkoprf.P ShowDiroItems\)” on page 3-28](#)
- [“View Emergency Contacts \(bwgkoemr.P ViewEmrgContacts\)” on page 3-33](#)
- [“Update Emergency Contacts - Select Contact \(bwgkoemr.P SelectEmrgContacts\)” on page 3-33](#)
- [“Update Emergency Contacts \(bwgkoemr.P UpdateEmrgContacts\)” on page 3-34](#)
- [“Update Marital Status \(bwgkogad.P SelectMtypUpdate\)” on page 3-38](#)
- [“Name Change Information \(bwgkoinf.P DispUpdName\)” on page 3-39](#)
- [“Social Security Number Change Information \(bwgkoinf.P DispUpdSSN\)” on page 3-40](#)
- [“Change PIN \(twbkwbis.P ChangePin\)” on page 3-42](#)
- [“Veteran Classifications \(bwgkvets.P DispClass\)” on page 3-43](#)
- [“User Logout \(twbkwbis.P Logout\)” on page 3-45](#)

Banner Web General delivers the functionality that supports the items on the Personal Information Menu that appears on every Self-Service application’s main menu. This section describes the implementation of the basic requirements for those pages, regardless of application.

## Answer A Survey (bwgksrvy.P\_ShowSurveys)

This page is available from the Personal Information Menu.

### Web Page Fields

Item	Description/Source Information
Existing Surveys	Surveys that have not be completed will be available for update.

### Updates to Banner

Item	Description
Responses from users are stored in the GORSRVR table.	The Survey Responses Repeating Table (GORSRVR) contains the individual responses.
Header information for the survey responses are stored in the GOBSRVR table.	The Survey Response Header Table (GOBSRVR) contains one row for each person who responds to the survey.

### Web Menus With Links to This Page

`bmenu.P_GenMnu`      Personal Information Menu

## Change Security Question (twbkwbis.P\_SecurityQuestion)

This page is available from the Personal Information Menu.

The very first time a user logs in to the Secured Access area with a valid User ID and PIN, the system presents a Security Question/Answer page. The user must define a security question for which only he or she has the answer. The questions and answers on this page can be used as a way for the user to re-establish the PIN if necessary. This allows users to find PINs they may have forgotten without bothering your institution's web master, so your institution needs fewer people involved with PIN maintenance, resulting in better overall PIN security.

The Question/Answer page appears automatically when the PIN Hint Question and PIN Hint Response are not present on the Third Party Access Audit Form (GOATPAD) in Banner General.

## Web Page Fields

<b>Item</b>	<b>Description/Source Information</b>
Old Question	The question that the user supplied the first time he or she logged in to the Secure Access area.
Old Answer	The answer that the user supplied for this question.
New Question	The new question that the user wants to use.
New Answer	The answer that the user supplied for this question.

## Buttons/Icons on This Page

<b>Button/Icon</b>	<b>Action</b>
Submit	Saves your changes.
Reset	Clears the contents of the New Question and New Answer fields.

## View Addresses and Phones (bwgkogad.P\_SelectAtypView)

This page displays address and telephone information. It displays all of the user's current and future addresses, and the associated telephone information. The addresses are grouped by address type.

### **Address Type Inclusion**

If the following criteria are met, the address type is included:

1. At least one rule must exist for the address type on the Address Role Privileges Form (GOAADRL) in Banner General for the Web role(s) associated for the user.
2. The privilege indicator for the address type must be *U* (update) or *D* (display).
3. An active address for any current, or future date exists in the database for the Type of Address.

A user may have multiple Self-Service roles. If more than one address role rule exists with a different privilege for the same address type for the user, the rule with the highest privilege will be effective for the Address and Phone options available on the Web.

For example, suppose a user has four roles and the following rules exist in GOADDRL:

Address Type	Role	Privilege
MA(iling)	EMPLOYEE	U(pdate)
MA(iling)	FACULTY	D(isplay only)
MA(iling)	STUDENT	N(o access)
MA(iling)	ALUMNI	U(pdate)

The user will be permitted to access View the Mailing Address and Phones, even though the STUDENT role does not allow access to, or display of, Mailing address type information. *Update* is considered a higher privilege than *Display only*, and *Display only* is considered a higher privilege than *No access*.

 **Note**

If an address type role does not exist for a specific address type and Web role, that combination is treated as *No access*. ■

**Inactive Addresses**

Inactive addresses will never be displayed, even if the Address Role Privileges Form (GOAADRL) in Banner General includes a rule to allow display or update for the specified address type for the user's Self-Service role. Addresses with past or future effective dates can be viewed.

The date's format is determined by the date format specified on the Web Rules page of Web Tailor.

For example, the Mailing address type is enabled for Self-Service access, and the user has the following mailing address records:

Mailing address one:  
Effective from January 1, 1996 to December 31, 2000, marked Inactive

Mailing address two:  
Effective from January 1, 2001 to December 31, 2001

Mailing address three:  
Effective from January 1, 2002 through December 31, 2005

Mailing address four:  
Effective from January 1, 2006 (no end date currently specified)

If today's date is June 1, 2005, when this user selects View Address Information, the address and phone information for address three and address four will be displayed. They will be grouped under the Mailing Addresses heading. Address three will have *Current* next to the address. Address four will have *Future* next to the address.

The Self-Service system allows address records to be viewed with the following combinations of from and to dates:

If there is any telephone information associated with the address type, it is displayed.

	From	To
1	specific date	no date
2	specific date	specific date

## Web Page Fields

Item	Description/Source Information
Address Type	The address type, e.g., <i>Permanent</i> or <i>Mailing</i> . See “Address Type Inclusion,” below.
Current/Future Indicator	If SYSDATE falls within the effective dates for the address, <i>Current</i> will be displayed next to the address. If the effective dates for the address are later than SYSDATE, <i>Future</i> will be displayed next to the address.
Existing Address and Phones Information	Address and phones information is retrieved from the Banner database. See “Inactive Addresses,” below.

## Links to Other Web Pages

This Link	Action
Update Addresses and Phones	Goes to the Update Addresses and Phones - Select Address page (bwgkogad.P_SelectAtypUpdate).

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Other Web Pages With Links to This Page

Update Addresses and Phones -Select Address	bwgkogad.P_SelectAtypUpdate
Update Addresses and Phones - Update/Insert	bwgkogad.P_DisppAddrUpdate

## Web Page Fatal/Warning Error Messages

**Message:** *There are no addresses available for you to view.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_SelectAtypView

**Action:** End user or administrative action required. The end user has no active addresses available. The end user must go to the Update Addresses and Phones - Select Address page and insert a new address with effective dates on or after the SYSDATE.

---

## Update Addresses and Phones - Select Address (bwgkogad.P\_SelectAtypUpdate)

Two pages are involved in updating address and phone information.

The Update Addresses and Phones - Select Address page displays all of the user's current and future addresses, along with the associated phones information. The addresses are grouped by address type.

Each address has a link to the Update Addresses and Phones - Update/Insert page, which allows the user to update the address and phone information for that address. The user can also choose to insert a new address by selecting an address type from the pull-down list and choosing Type of Address to Insert. This takes the user to the Update Addresses and Phones - Update/Insert page where he can insert new address and telephone information.

## Web Page Fields

Item	Description/Source Information
Type of Address	The Type of Address heading displays all available address types. See the "Address Type Inclusion" topic in the description of the "View Addresses and Phones" web page.

## Web Page Fields

<b>Item</b>	<b>Description/Source Information</b>
Current/Future link	<p>The Current/Future Link is visible if the address is a current address or a future address. If SYSDATE falls within the effective dates for the address, <i>Current</i> will appear next to the address. If the effective dates for the address are later than SYSDATE, <i>Future</i> will appear next to the address.</p> <p>When the user clicks on the link, he will be taken to the Update Addresses and Phones - Update/Insert page. He can now change existing address and telephone information for the associated address.</p>
Existing Address and Phones Information	<p>Address and telephone information that appears is retrieved from the Banner database. See the “Inactive Addresses” topic in the description of the “View Addresses and Phones” web page.</p>
Type of Address Pull-down List	<p>The Type of Address pull-down list displays all address types available for viewing. See the “Address Type Inclusion” topic in the description of the “View Addresses and Phones” web page.</p>

## Links to Other Web Pages

<b>This Link</b>	<b>Action</b>
Change of address link	Opens the designated URL in a new window.
Current	Goes to the Update Addresses and Phones - Update/Insert page (bwgkogad.P_DispatchUpdate).
Primary	Goes to the Update Addresses and Phones - Update/Insert page (bwgkogad.P_DispatchUpdate).
View Addresses and Phones	Goes to the View Addresses and Phones page (bwgkogad.P_SelectAtypView).

## Buttons/Icons on This Page

<b>Button/Icon</b>	<b>Action</b>
Submit	Goes to the Update Addresses and Phones - Update/Insert page (bwgkogad.P_DispatchUpdate).

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Other Web Pages With Links to This Page

View Addresses and Phones	bwgkoad.P_SelectAtypView
---------------------------	--------------------------

Directory Profile	bwgkoprf.P_ShowDiroItems
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## Web Page Fatal/Warning Error Messages

**Message:** *There are no addresses available for you to update.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_SelectAtypUpdate

**Action:** End user or administrative action required. The end user has no active addresses available. The end user must insert a new address with effective dates on or after the SYSDATE to update it.

---

**Message:** *Errors occurred. Please try again. Invalid address type.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_ValidateAtyp

**Action:** End user or administrative action required.  
In this example, the end user did not select a valid address type from the pull-down list. The last sentence can vary, depending on which field had invalid data.

---

## Update Addresses and Phones - Update/Insert (bwgkogad.P\_DispatchUpdate)

Two Self-Service pages are involved in updating address and telephone information

The user will either choose to update an existing address or to insert a new address on the Update Addresses and Phones - Select Address page.

If he chooses to update an address, he can go to the Update Addresses and Phones - Update/Insert page, which displays the address and associated telephone information. If he chooses to insert a new address, he can go to the Update Addresses and Phones - Update/Insert page to enter the new address and telephone information.

Information text on this page includes a link to the United States Postal Service web site. Associated with this Info Text is an icon for the United States Postal Service. This image is inserted into the TWGBIMAG table.

### ***Address Update Logic***

When updating an address, the dates entered in the **Valid From This Date** and **Until This Date** fields cannot overlap with the dates of any active addresses of the same address type. If they do, the system will return an error.

Changing address and telephone information makes the current address record inactive, and creates one or more new ones. The number of new records created depends on whether changes are made to address and/or telephone information, and whether the **Valid From This Date** and **Until This Date** fields are also changed.

### ***Address Insert Logic***

When inserting a new address, the dates entered in the **Valid From This Date** and **Until This Date** fields cannot overlap with the dates of more than one active address of the same address type. If the dates overlap with more than one active address, the system will return an overlapping date error.

If the new address overlaps with an existing address, the existing address is inactivated. A new address record(s) with the old address information is created with **Valid From This Date** and **Until This Date** fields, changed so that the old address does not overlap with the new address. A new address record is created for the address being inserted with **Valid From This Date** and **Until This Date** fields unchanged.

For example, the Mailing address type is Web-enabled, and the user has the following mailing address record:

Mailing Address 1:  
01/01/03 -- 12/31/03  
123 Market St.  
Rochester, NY 12345

The user inserts the following Mailing address:

10/10/03 -- 10/20/03  
456 Main St.  
San Diego, CA 54321

Mailing Address 1 will become inactive, and the following will become the new address information.

Mailing Address 1:  
01/01/03 -- 10/09/03  
123 Market St.  
Rochester, NY 12345

Mailing Address 2:  
10/10/03 -- 10/20/03  
456 Main St.  
San Diego, CA 54321

Mailing Address 3:  
10/21/03 -- 12/31/03  
123 Market St.  
Rochester, NY 12345

## Deleting the United States Postal Service Link

Users can delete this link by performing the following steps.

1. Log on to the Banner Self-Service with a Web Tailor Administrator role.
2. From the Main Menu, select **Web Tailor Administrator**.
3. From the Web Tailor menu, select **Information Text**.
4. From the Select Information Text to Customize page, select `bwgkogad.P_SelectAtypUpdate`. Select **Customize Information Text**.
5. From the Reorder or Customize Information Text page, select the label of the item with sequence number 2.
6. On the Customize the Selected Information Text Entry page, verify that the correct Information Text is displayed, as follows:

*Change of address information and USPS forms are available through <A HREF="https://moversguide.usps.com/?referral=USPS" target="\_blank">this link</A>.*

7. Select **Delete this Entry**.

## Web Page Fields

Item	Description/Source Information
Type of Address	The address type of the address being updated or inserted. Display only.  See the “Address Type Inclusion” topic in the description of the “View Addresses and Phones” web page.
Delete This Address Checkbox	Select to make the current address inactive.
Existing Address and Phones Information	Address and telephone information from the Banner database; however, inactive addresses will never appear, even if the Address Role Privileges Form (GOAADRL) includes a rule to allow display or update for the specified address type for the user’s Self-Service role. Any addresses with future effective dates will be available for update. The date’s format is determined on the Web Rules page in Web Tailor.
Address and/or phones record(s)	A phone entered in the address information area will be designated as the primary phone for the address, and will check the Primary Indicator (set to Y), and associate the address type and sequence number with that phone number.  If the <b>Delete Address</b> check box is selected, the address will be made inactive in the database. If the <b>Delete</b> check box next to an additional phone number is selected, the phone will be made inactive.  The system does not allow for active addresses with the same address type to have overlapping dates. To allow the user the maximum amount of freedom, the logic to insert an address is different from the logic to update one. The following explains the differences.  See “Address Update Logic” and “Address Insert Logic” above.

## Updates to Banner

<b>Item</b>	<b>Description</b>
Address and/or phones record(s)	See “Address Update Logic” and “Address Insert Logic” above.  <b>Note:</b> Address and primary phone changes and additions appear on the Address and Telephone windows of the Identification Forms (e.g., SPAIDEN, FOAIDEN, etc.). Telephone changes and additions appear on the Telephone window of the Identification Forms (e.g., SPAIDEN, FOAIDEN, etc.).

## Links to Other Web Pages

<b>This Link</b>	<b>Action</b>
View Addresses and Phones	Goes to the View Addresses and Phones page (bwgkogad.P_SelectAtypView).

## Buttons/Icons on This Page

<b>Button/Icon</b>	<b>Action</b>
Submit	Saves your changes and goes to the Update Addresses and Phones page.
Reset	Deletes the choices the user has made and returns to the default settings.
Select a Different Address to Update	Goes to the Update Addresses and Phones - Select Address page (bwgkogad.P_SelectAtypUpdate)

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Other Web Pages With Links to This Page

Update Addresses and Phones - Select Address	bwgkogad.P_SelectAtypUpdate
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## Web Page Fatal/Warning Error Messages

**Message:** *Errors occurred. Please try again...*

*One or more of the following messages may be displayed, depending on the information entered by the user:*

- Form item From date must be entered*
- Address Line 1 must be entered*
- City must be entered*
- State or Province and ZIP, or Postal Code, or Nation must be entered*
- Phone number is required when other phone information has been entered*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_ValAddrUpdate

**Action:** End user or administrative action required.  
The data entered by the end user did not meet the minimum Banner database requirements to create either an address or telephone record.

---

**Message:** *Errors occurred. Please try again.*  
*Form item <date field> has invalid format/values.*  
*<date field> can be either "From date" or "Until date"*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_ValidateAtyp

**Action:** End user or administrative action required. The end user did not enter a correct date format or values.

---

**Message:** *A Mailing address exists with future effective dates beginning on...*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_DispatchAddrUpdate

**Action:** End user or administrative action optional. If the end user enters a blank Until date, a future address may be made inactive inadvertently. This is merely a warning to the user.

---

**Message:** *Errors occurred. Please try again.*  
*From / Until date combination overlaps existing address which is effective from <date> to <date>*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_ValAddrUpdate

**Action:** End user or administrative action required. The end user entered a From / Until date combination that overlaps one or more existing addresses of the same address type. The end user needs to re-enter the From / Until dates.

---

## View E-mail Addresses (bwgkogad.P\_SelectEmailView)

This page displays all active e-mail addresses, grouped by e-mail type. The preferred e-mail address will have *Preferred* next to it. Any comments for a particular address immediately follow it.

### Setup Requirements

Item	Description
Update E-mail Addresses	You must set up e-mail addresses on the Update E-mail Addresses - Select Address page (bwgkogad.P_SelectEmailUpdate) or else none will appear on this page.

### Links to Other Web Pages

This Link	Action
Update E-mail Addresses	Goes to the Update E-mail Addresses - Select Address page (bwgkogad.P_SelectEmailUpdate).

### Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Messages

**Message:** *There are no e-mail addresses available for you to view.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_SelectEmailView

**Action:** End user or administrative action required.  
The end user has no active e-mail addresses available. The end user must go to the Update E-mail Addresses - Select Address page and insert a new address. The end users may have a type of e-mail that has not been set to be viewed on the web. The administrator uses the E-mail Address Type Validation Form (GTVEMAL) in Banner General to specify which address types will be displayed.

---

## Update E-mail Addresses - Select Address (bwgkogad.P\_SelectEmailUpdate)

Two Self-Service pages are involved in updating e-mail address information.

This page will display all active e-mail addresses, grouped by e-mail type. The preferred e-mail address will have *Preferred* next to it. Any comments for a particular address will be printed directly below the e-mail address.

To update an existing e-mail address, the user will select the address link to go to the Update E-mail Address -Update/Insert page to update the e-mail address information. To insert a new e-mail address, the user will select the e-mail address type from the pull-down list. The Update E-mail Address - Update/Insert page appears, and the user can insert the new e-mail address.

## Web Page Fields

Item	Description/Source Information
Type of E-mail Address Heading	The e-mail address types. At least one active e-mail address must exist for the user for the e-mail address type to be included in the page.
E-mail Address Information	E-mail address information shown is retrieved from the Banner database; however, inactive addresses will never be displayed.
E-mail Addresses Comment	Comment on this e-mail address is retrieved from the Banner database

## Web Page Fields

Item	Description/Source Information
Type of E-mail Address Pull-down	Displays all e-mail address types that have been defined in Banner on the E-mail Address Type Validation Form (GTVEMAL).

## Links to Other Web Pages

This Link	Action
E-mail address	Goes to the Update E-mail Addresses - Update/Insert page (bwgkogad.P_DispatchEmailUpdate).
View E-mail Addresses	Goes to the View E-mail Addresses page (bwgkoemr.P_SelectEmailView).

## Buttons/Icons on This Page

Button/Icon	Action
Submit	Goes to the Update E-mail Addresses - Update/Insert page (bwgkogad.P_DispatchEmailUpdate).

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Other Web Pages With Links to This Page

View E-mail Addresses	bwgkogad.P_SelectEmailView
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## Web Page Fatal/Warning Error Messages

**Message:** *There are no e-mail addresses for you to update.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_SelectEmailUpdate

**Action:** End user or administrative action required.  
The end user has no active e-mail addresses available. The end user must go to the Update E-mail Addresses - Select Address page and insert a new address. The end users may have a type of e-mail that has not been set to be viewed on

the web. The administrator uses the E-mail Address Type Validation Form (GTVEMAL) in Banner General to specify which address types will be displayed.

---

**Message:** *Errors occurred. Please try again. Invalid e-mail type.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_ValidateEmail

**Action:** End user or administrative action required.  
The end user did not select a valid e-mail address type from the pull-down list.

---

## Update E-mail Addresses - Update/Insert (bwgkogad.P\_DispatchEmailUpdate)

Two Self-Service pages are involved in updating e-mail address information.

The user will either choose to update an existing e-mail address or to insert a new e-mail address on the Update E-mail Addresses - Select Address page. After a user selects to update an e-mail address, he can go to the Update E-mail Address - Update/Insert page, which displays the e-mail address, comments associated with the address, a preferred check box and a delete check box. If the user chooses to insert a new e-mail address, he can go to the Update E-mail Address - Update/Insert page to enter the new e-mail address and associated information.

### Web Page Fields

Item	Description/Source Information
Type of E-mail Address Heading	The e-mail address type.
E-mail Address Information	E-mail address information displayed is retrieved from the Banner database; however, inactive addresses will never be displayed.
Preferred Address	The address type and the e-mail address of the preferred e-mail address. Only one e-mail address can be a preferred address.
Delete this Address	Check the check box to make the current address inactive.

## Updates to Banner

Item	Description
E-mail record(s)	<p>Updates to existing e-mail addresses can include changing the address or comment information, inactivating the address or designating the address as preferred. Only one e-mail address may be designated as the preferred address. These changes will update the existing record appropriately. Existing e-mail addresses can never be deleted on the web, but they can be made inactive. Any new e-mail address records will be added to the database, and displayed on the GOAEMAL form and the E-mail window of the Identification forms (e.g., SPAIDEN).</p> <p><b>Note:</b> Updates and additions will be displayed on the E-mail Address Form (GOAEMAL) and the E-mail window of the Identification forms (e.g., SPAIDEN)</p> <p><b>Note:</b> If a user enters an e-mail type and address is identical to an existing one that is inactive, the record will become active again.</p>
User ID	<p>E-mail address records updated or added via the Web will record the Oracle Web Server Agent as the User ID associated with the changes.</p>

## Links to Other Web Pages

This Link	Action
View E-mail Addresses	Goes to the View E-mail Addresses page (bwgkogad.P_SelectEmailView).

## Buttons/Icons on This Page

Button/Icon	Action
Submit	Saves your changes and goes to the bwgkogad.P_ProcEmailUpdate page.
Reset	Deletes the choices the user has made and returns to the default settings.
Select a Different E-mail Address to Update	Goes to the Update E-mail Addresses - Select Address page (bwgkogad.P_SelectEmailUpdate)

## Web Page Fatal/Warning Error Messages

**Message:** *Errors occurred. Please try again.  
E-mail must be entered.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_ValEmailUpdate

**Action:** End user or administrative action required.  
The end user has not entered an e-mail address. The data entered by the end user did not meet the minimum Banner database requirements to create an e-mail address record.

---

**Message:** *Errors occurred. Please try again.  
Only one preferred e-mail address may be specified.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_ValEmailUpdate

**Action:** End user or administrative action required.  
There is already an active e-mail address that is preferred.

---

**Message:** *Errors occurred. Please try again.  
This E-mail address already exists for this address type. Please enter another address.*

**Source:** bwgkoad1.sql  
Procedure bwgkoadr.P\_ValEmailUpdate

**Action:** End user or administrative action required.  
There is already a record in the database with the same e-mail address and the same address type. To update this address, the end user goes back to the Update E-mail Addresses - Select Address page. He then selects the link for the e-mail address to update it.

---

## Directory Profile (bwgkoprf.P\_ShowDirItems)

A list of directory items is displayed for the user. Items with check boxes allow the user to include that piece of information in the campus directory. Items without check boxes are automatically included in the campus directory, except for unlisted telephone numbers. Any phones designated as *unlisted* will not be published.

Some of the directory profile items are specific to the STUDENT role, the EMPLOYEE role, the ALUMNI role, or another Self-Service role. If *Not Reported* appears next to a specific item, the item is not available for the user's role, or it is not found in the Banner database. Rules on the Directory Options Rule Form (GOADIRO) determine the hierarchy of address types and telephone types that should be searched for reporting that information.

 **Note**

A directory profile for a user does *not* exist until the user has accessed this page and performed an update. Campus directory information can still be created for that person. ■

The rules established on the Directory Options Rule Form (GOADIRO) in Banner General control the items that are included in the Directory Profile, depending on the user's Self-Service roles. GOADIRO also controls which directory items will automatically be the default when the campus directory is created, even if a directory profile record has not been created on the Web. In addition, rules in GOADIRO control which items the user can choose to include in the directory profile.

## Web Page Fields

Item	Description/Source Information
Address and Telephone Display	Directory profile items identified as either an Address or Telephone Item Type must have search hierarchies defined on GOADIRO. This hierarchy determines which address and telephone types will be searched in what order to find a currently active address or telephone information from the Banner database. The first address and telephone found in the specified hierarchy is displayed on the page. If an address or telephone cannot be found among the types specified in the hierarchy, <i>Not Reported</i> appears on the page.
E-mail Addresses Display	The directory profile will display all active e-mail addresses that exist for the user. The e-mail address type for each e-mail address appears in parentheses.
College Affiliation	A College Affiliation is displayed for users with the STUDENT Self-Service role only. It is the description of the college designated as <i>Primary</i> from the most recent general student record as reported on the General Student Form (SGASTDN).

## Web Page Fields

Item	Description/Source Information
Expected Graduation Year	An Expected Graduation Year is displayed for users with the STUDENT Self-Service role only. It is the expected graduation date from the most recent general student record as reported on the General Student Form (SGASTDN). If no date exists, <i>Not Reported</i> will appear.
Employee Position Title Employee Department	<b>Employee Position Title</b> is displayed for users with the EMPLOYEE Self-Service role only. It is the position title description for the currently active jobs reported in the <b>Title</b> field on the Employee Jobs Form (NBAJOBS). <b>Employee Department</b> appears in parentheses next to the position title description.
Maiden Name	Displayed for users with the ALUMNI Self-Service role only. It is the <b>Birth Name</b> field on the Constituent/Organization Form (APANAME).
Class Year	Displayed for users with the ALUMNI Self-Service role only. It is the <b>Preferred Class Year</b> field on the Constituent Information Form (APACONS).
Preferred College	Displayed for users with the ALUMNI Self-Service role only. It is the <b>Preferred College</b> field on the Constituent Information Form (APACONS).

## Setup Requirements

Item	Description
Directory Options Rule Form (GOADIRO)	<p data-bbox="732 327 1373 394">For each Directory Item, enter values for the following fields:</p> <p data-bbox="732 422 1373 590"><b>Display Sequence (number)</b>--Designates the order in which the directory profile items appear on the page. Items with a lower number will appear before items with a higher number. Gaps between numbers will not cause blank spaces to appear on the page.</p> <p data-bbox="732 617 1373 747"><b>Display in Directory</b>--Allows the institution to specify whether the particular directory item should be included in the Student directory, the Employee directory, the Alumni directory, or all directories.</p> <p data-bbox="732 774 1373 905"><b>Display in Directory</b>--Allows the institution to specify whether the particular directory item should be included in the Student directory, the Employee directory, the Alumni directory, or all directories.</p> <p data-bbox="732 932 1373 1142"><b>Update in Profile</b>--If selected, the user can to control whether the directory item is included for publication in the campus directory by checking and clearing the item on the Directory Profile page. If the indicator is cleared, the user cannot prevent the item from being included in the campus directory.</p> <p data-bbox="732 1169 1373 1268"><b>Display in Profile</b>--If selected, the directory item should be displayed on the Directory Profile page and included in the campus directory.</p> <p data-bbox="732 1295 1373 1392"><b>Default to Directory</b>--If selected, the item will automatically be included in the campus directory, even if a user does not create a directory profile on the page.</p>

## Updates to Banner

<b>Item</b>	<b>Description</b>
Directory Profile Record	A directory profile record will not be created in the Banner database until the user submits an update on the Directory Profile page. Once the directory profile record is created, additional updates will modify the existing record. The User ID is the Oracle Web Server Agent for all changes made on the page, and the Activity Date identifies the date of the most recent change.

## Links to Other Web Pages

<b>This Link</b>	<b>Action</b>
E-mail address	If the e-mail address is displayed as a hyperlink, launches the user's e-mail program with the person's e-mail address.
Update Addresses and Phones	Goes to the Update Addresses - Select Type page (bwgkogad.P_SelectAtypUpdate).
Name Change Information	Goes to the Name Change Information page (bwgkoinf.P_DisUpdName).
Update E-mail Addresses	Goes to the Update E-mail Addresses - Select Type page (bwgkogad.P_SelectEmailUpdate).

## Buttons/Icons on This Page

<b>Button/Icon</b>	<b>Action</b>
Submit Changes	Goes to the Personal Information Menu (bmenu.P_GenMnu).
Reset	Deletes the choices the user has made and returns to the default settings.

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## View Emergency Contacts (bwgkoemr.P\_ViewEmrgContacts)

All existing emergency contact information for the user will appear in ascending priority order. If no emergency contacts exist, the message *No Emergency Contact Information found* is shown.

### Web Page Fields

Item	Description/Source Information
Existing emergency contact information	Emergency contact information from the Emergency Contact Form (SPAEMRG) or the Emergency Contact window of the Identification forms (e.g., SPAIDEN).

### Links to Other Web Pages

This Link	Action
Update Emergency Contacts	Goes to the Update Emergency Contacts - Select Contact page (bwgkoemr.P_SelectEmrgContacts).

### Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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### Other Web Pages With Links to This Page

Update Emergency Contacts - Select Contact	bwgkoemr.P_SelectEmrgContacts
Update Emergency Contacts	bwgkoemr.P_DisEmrgForm

## Update Emergency Contacts - Select Contact (bwgkoemr.P\_SelectEmrgContacts)

Two Self-Service pages are involved in updating emergency contact information.

A user can update an existing emergency contact by selecting the name link displayed, or they can enter a new contact by selecting the **New Contact** link. After selecting a new or existing contact, the user goes to the Update Emergency Contacts page.

## Web Page Fields

<b>Item</b>	<b>Description/Source Information</b>
Emergency contact information	Existing emergency contact information from the Emergency Contact Form (SPAEMRG) or the Emergency Contact window of the Identification forms (e.g., SPAIDEN).

## Links to Other Web Pages

<b>This Link</b>	<b>Action</b>
Name	Goes to the Update Emergency Contacts page (bwgkoemr.P_Dis pEmrgFormPidm) with the fields filled in with the values for the selected contact.
Access Emergency Contacts	Goes to the Emergency Contacts page (bwgkoemr.P_ViewEmrgContacts).

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Other Web Pages With Links to This Page

View Emergency Contacts	bwgkoemr.P_ViewEmrgContacts
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## Update Emergency Contacts (bwgkoemr.P\_UpdateEmrgContacts)

Two Self-Service pages are involved in updating emergency contact information.

A user indicates whether they want to update an existing emergency contact or create a new one on the Update Emergency Contacts - Select Contact page.

The Update Emergency Contacts page displays the information for an existing contact. If a new contact was chosen, the user can enter the new information on the page. If the user chose to update an existing one, they can change the contact information itself or its priority number, or they can delete it. Minimum Banner database requirements will be enforced for entering information for a new contact.

## Contact Priority Numbers

If a contact is deleted, the priority numbers for the remaining contacts are updated automatically.

The priority number for a contact can be changed, but not to a value greater than the maximum value for existing contacts. When the priority number of an existing contact is changed, and a contact already exists with that priority number, the existing contact priority numbers will be reordered. This reordering will preserve the existing order - contacts with a “higher” priority (lower priority number) than other contacts will still have a “higher” priority after the reordering.

For example, existing contact priority numbers are:

- 1 - Contact A
- 2 - Contact B
- 3 - Contact C

The user changes the contact with priority 3 to priority 1. The contact numbers are reordered as follows:

- 1 - Contact C
- 2 - Contact A
- 3 - Contact B

If the user deletes an emergency contact, any existing contacts with a “lower” priority (higher priority number) will be reordered to use the deleted contact’s number.

For example, existing contact priority numbers are:

- 1 - Contact W
- 2 - Contact X
- 3 - Contact Y
- 4 - Contact Z

The user deletes the contact with priority 2. The contact priority numbers are reordered as follows:

- 1 - Contact W
- 2 - Contact Y
- 3 - Contact Z

When a user enters a new contact, its priority will automatically be assigned by adding 1 to the lowest priority contact (highest number).

## Web Page Fields

<b>Item</b>	<b>Description/Source Information</b>
Emergency contact information	Existing emergency contact information from the Emergency Contact Form (SPAEMRG) or the Emergency Contact window of the Identification forms (e.g., SPAIDEN).

## Updates to Banner

<b>Item</b>	<b>Description</b>
Emergency contact records.	<p>Minimum Banner database requirements for emergency contact information are a priority number and a name. Relationship, address and phone information are optional.</p> <p><b>Note:</b> Changes and additions will be displayed on the Emergency Contact Form (SPAEMRG) and the Emergency contact window of the Identification Forms (e.g., SPAIDEN).</p> <p>See “Contact Priority Numbers,” above.</p>

## Links to Other Web Pages

<b>This Link</b>	<b>Action</b>
View Emergency Contacts	Goes to the View Emergency Contacts page (bwgkoemr.P_ViewEmrgContacts).

## Buttons/Icons on This Page

<b>Button/Icon</b>	<b>Action</b>
Submit Changes	Goes to the Update Emergency Contacts page (bwgkoemr.P_SelectEmrgContacts).
Reset	Deletes the choices the user has made and returns to the default settings.
Select An Emergency Contact to Update	Goes to the Update Emergency Contacts page (bwgkoemr.P_SelectEmrgContacts). This button appears only when an error has occurred during an update.

## Web Menus With Links to This Page

Personal Information Menu      bmenu.P\_GenMnu

## Other Web Pages With Links to This Page

View Emergency Contacts      bwgkoemr.P\_ViewEmrgContacts

## Web Page Fatal/Warning Error Messages

**Message:** *Contact order must be between 1 and <max existing contact priority>. You entered <value>.*

**Source:**    bwgkoem1.sql  
             Procedure bwgkoemr.P\_UpdateEmrgContacts

**Action:**    End user or administrative action required. The end user tried to change the contact priority for an existing contact to a number that is greater than the highest number for an existing emergency contact. The end user is permitted only to specify a new number within the range of existing contacts, which will reorder them as described in the Updates in Banner section above.

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**Message:** *Contact order must be a number. You entered <value>.*

**Source:**    bwgkoem1.sql  
             Procedure bwgkoemr.P\_UpdateEmrgContacts

**Action:**    The end user entered a value other than one through eight for the contact priority. Although the database can accommodate nine emergency contact records, the page does not permit the end user to specify nine because of the method and logic used to reorder contacts.

---

**Message:** *Errors occurred. Please try again.*

*One or more of the following messages may be displayed, depending on the information entered by the end user:*

- \* Address line 1 must be entered
- \* City must be entered
- \* State and ZIP code, or country must be entered

**Source:** bwgkoem1.sql  
**Procedure** bwgkoemr.P\_UpdateEmrgContacts

**Action:** End user or administrative action required. The data entered by the end user did not meet the minimum Banner database requirements to create the address portion of an emergency contact record.

---

## Update Marital Status (bwgkogad.P\_SelectMtypUpdate)

The user's current marital status will be visible in the pull-down list. The appropriate change can be selected for the marital status descriptions that are available when the user displays the complete list. After changing their marital status, the user will be returned to the menu and the message “Your marital status has been successfully changed” appears.

### Web Page Fields

Item	Description/Source Information
Marital Status	All marital status descriptions that have been defined in the Marital Status Code Validation Form (STVMRTL) will display in the pull-down list presented to the user.

### Updates to Banner

Item	Description
Marital Status	The <b>Marital Status</b> field on the General Person Form (SPAPERS) will be updated with the change made by the user.
Activity Date	The <b>Activity Date</b> field in SPAPERS will be updated with the current date when a user updates their marital status.

## Buttons/Icons on This Page

Button/Icon	Action
Update Marital Status	Goes to the Personal Information Menu (bmenu.P_GenMnu).
Reset	Deletes the choices the user has made and returns to the default settings.

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Name Change Information (bwgkoinf.P\_DispUpdName)

This page presents the user with the institution's policies and procedures for requesting a name change. The content of the page is composed solely of Info Text.

Information Text includes a link to Social Security Online, a service of the Social Security Administration, and its icon. This image is inserted into the TWGBIMAG table.

From the Name Change Information page, users can use a link to access Social Security Online directly. There users can download a form (Form SS-5) to fill out when they need to replace a lost Social Security card, request a new card, or change the name that appears on the card.

### Note

The **Social Security Online** link and image are applicable only within the United States. ■

You can delete this link and its associated Info Text by performing the following steps:

### Note

Before making changes to Information Text, you must first have copied the *Baseline* Information Text records to *Local*. See “Baseline and Local Records” in Chapter 5 of the *Banner Web Tailor User Guide* for more information. ■

1. Logon to the Web with a Web Tailor Administrator role.
2. From the Main Menu, select **Web Tailor Administrator**.
3. From the Web Tailor menu, select **Information Text**.

4. From the Selection Information Text, select `bwgkoinf.P_DisUpdName` to customize the page. Select **Customize Information Text**.
5. From the Reorder or Customize Information Text page, select sequence number 5. (Select the label for this Info Text entry.)
6. On the Customize the Selected Information Text Entry page, verify that the correct Info Text is displayed. The Info Text for the displayed entry appears as follows:
 

```
<A HREF="http://www.ssa.gov/replace_sscard.html" target="_blank"> Social Security Online </A> allows you to update your Social Security Card information.
```
7. Select **Delete this Entry**.

**Source:**

This page does not have any fields.

## Setup Requirements

Item	Description
<code>bwgkoinf.P_DisUpdName</code> Label: DEFAULT, Sequence 1,2,3,4,5 and 6	Info Text must reflect your institution's policies and procedures for submitting a name change.

## Web Menus With Links to This Page

Personal Information Menu	<code>bmenu.P_GenMnu</code>
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## Other Web Pages With Links to This Page

Directory Profile	<code>bwgkoprf.P_ShowDiroItems</code>
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## Social Security Number Change Information (`bwgkoinf.P_DisUpdSSN`)

This page presents the user with the institution's policies and procedures for requesting a social security number change. The content of the page is composed *solely* of Info Text.

Info Text includes a link to Social Security Online, a service of the U.S. Social Security Administration, and an icon for Social Security Online. This image is inserted into the TWGBIMAG table.

## New SSN Link

From the Social Security Number Change Information page, users can use a link to access Social Security Online directly. There users can download a form (Form SS-5) to fill out when they need to replace a lost Social Security card, request a new card, or change the name that appears on the card.

### Note

The Social Security online link and image are applicable only within the United States. ■

You can delete this link and its associated Information Text by performing the following steps.

### Note

Before making changes to Information Text, you must first have copied the *Baseline* Information Text records to *Local*. See “Baseline and Local Records” in Chapter 5 of the *Banner Web Tailor User Guide* for more information. ■

1. Log onto the Web with a Web Tailor Administrator role.
2. From the Main Menu, select **Web Tailor Administrator**.
3. From the Web Tailor menu, select **Information Text**.
4. From the Selection Information Text, select `bwgkoinf.P_DisUpdName` to customize the page. Select **Customize Information Text**.
5. From the Reorder or Customize Information Text page, select sequence number 5. (Select the label for this Info Text entry.)
6. On the Customize the Selected Information Text Entry page, verify that the correct Info Text is displayed. It appears as follows:

```
<A HREF="http://www.ssa.gov/replace_sscard.html" target="_blank"> Social  
Security Online </A> allows you to update your Social Security Card information.
```

7. Select **Delete this Entry**.

## Setup Requirements

Item	Description
bwgkoinf. P_DisUpdSSN Label: DEFAULT, Sequence 1, 2, 3 and 4	Info Text must reflect your institution's policies and procedures for submitting a social security number change.

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Change PIN (twbkwbis.P\_ChangePin)

To change a PIN, the user accesses this page from the Personal Information menu, then types and confirms the new PIN. After a PIN has been successfully changed, the user must use the new PIN for the next logon.

A PIN may be changed at any time by a user. It may be required on a specific date or after a certain period of time if the institution uses PIN expiration dates and the expiration date has been reached.

## Web Page Fields

Item	Description/Source Information
Enter Old PIN	<b>PIN</b> field on the Third Party Access Form (GOATPAC) and the Third Party Access Audit Form (GOATPAD) in Banner General. As the user enters the PIN, asterisks (*****) display protect the privacy of the information.
Enter New PIN	The user enters a PIN of their choice. As the user enters the new PIN, asterisks (*****) display to protect the privacy of the information.
Re-enter New PIN	The user verifies the new PIN by re-entering the same value entered in the <b>Enter New PIN</b> field. As the user re-enters the new PIN, asterisks (*****) display to protect the privacy of the information.

## Updates to Banner

<b>Item</b>	<b>Description</b>
Current PIN Information -- PIN, User ID and Activity Date	The <b>PIN</b> field in the Third Party Access Form (GOATPAC) and the Third Party Access Audit Form (GOATPAD) is updated with the new PIN. Also, the User ID recorded with the change is updated to the name of the Oracle Web Server Agent, and the Activity Date is updated to the current date.
PIN History Information	The previous PIN information used to logon to the current session (PIN, User ID and Activity Date) is moved to the PIN History display information in the GOATPAD form.

## Buttons/Icons on This Page

<b>Button/Icon</b>	<b>Action</b>
Change PIN	Goes to the Personal Information Menu (bmenu.P_GenMnu).
Reset	Deletes the choices the user has made and returns to the default settings.

## Web Menus With Links to This Page

Personal Information Menu	bmenu.P_GenMnu
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## Veteran Classifications (bwgkvets.P\_DispcClass)

The Veterans Classifications page is used to report the following Veteran information:

- Veteran Separation Date
- Disabled Veteran
- Veteran of the Vietnam Era
- Armed Forces Service Medal Veteran
- Other Protected Veteran

This page allows you to enter the Military Separation Date and select any of the Veteran Classification options which apply to you.

## Web Page Fields

<b>Item</b>	<b>Description/Source Information</b>
Military Separation Date	Date of the military separation.
Disable Veteran	Veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs, or (2) A person who was discharged or released from active duty because of a service-connected disability.
Veteran of the Vietnam Era	Person who (1) served on active duty for a period of more than 180 days, and was discharged or released therefrom with other than a dishonorable discharge, if any part of such active duty occurred: (i) In the Republic of Vietnam between February 28, 1961, and May 7, 1975; or (ii) Between August 5, 1964, and May 7, 1975, in all other cases; or (2) Was discharged or released from active duty for a service-connected disability if any part of such active duty was performed: (i) In the Republic of Vietnam between February 28, 1961, and May 7, 1975; or (ii) Between August 5, 1964, and May 7, 1975, in all other cases.
Armed Forces Service Medal Veteran	Any veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985.
Other Protected Veteran	A veteran who served on active duty in the U.S. military, ground, naval or air service during a war or in a campaign or expedition for which a campaign badge has been authorized, under the laws administered by the Department of Defense.

## Updates to Banner

<b>Item</b>	<b>Description</b>
Veteran Classification information	Stored data to SPBPERS table.

## Buttons/Icons on This Page

Button/Icon	Action
Submit	Saves the values to Banner and returns the user to the Personal Information menu.
Reset	Deletes the choices the user has made and returns to the default settings.

## User Logout (twbkwbis.P\_Logout)

The User Logout page will display whenever the user selects the **Exit** button, which is available on most Self-Service pages.

## Ethnicity and Race Survey Pages

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This section includes the following topics:

- [“Set Up the Ethnicity and Race Survey” on page 3-46](#)
- [“Update Ethnicity and Race \(bwgkomre.P\\_RaceSurvey\)” on page 3-47](#)
- [“View Ethnicity and Race \(bwgkomre.P\\_RaceSurveyConfirm\)” on page 3-49](#)
- [“Ethnicity and Race \(bwgkomre.P\\_RaceSurveyConfirm\)” on page 3-50](#)
- [“View Ethnicity and Race \(bwgkomre.P\\_ViewEthnicityRace\)” on page 3-51](#)
- [“Update Ethnicity and Race \(bwgkomre.P\\_SelectEthnicityRace\)” on page 3-52](#)

You can 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 options to complete the survey or to complete it later. Once the user has completed the survey it survey will no longer be presented.

The survey pages are delivered by SunGard Higher Education. The survey is displayed when all of the following conditions are met:

- 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. Also, 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.

## 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.

## 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** checkbox on the relevant Identification form is unchecked for the user.

### Web Page Fields

Item	Description/Source Information
Ethnicity	<p>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 checkboxes, the system displays an error message. If ethnicity information is already stored on the system, the relevant checkbox is checked.</p> <p><b>Note:</b> Information Text is used instead of a field label.</p>
Race	<p>User's race(s). Multiple values can be selected.</p> <p>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 checkbox is checked.</p> <p><b>Note:</b> Information Text is used instead of a field label.</p>

### Buttons/Icons on This Page

Button/Icon	Action
Review	<p>If information has been entered on the page, goes to the View Ethnicity and Race page (bwgkomre.P_RaceSurveyConfirm).</p> <p>If no checkboxes are checked, goes to the Ethnicity and Race page (bwgkomre.P_RaceSurveyConfirm).</p>

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

## 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).
Save	Saves the values to Banner and goes to the page defined in Web Tailor to be the first page presented.  <b>Note:</b> 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.

### 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.

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

## 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.

## 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.

## Setup Requirements

<b>Item</b>	<b>Description</b>
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

<b>This Link</b>	<b>Action</b>
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

<b>Item</b>	<b>Description/Source Information</b>
Ethnicity	User's ethnic category. Values are <i>Hispanic or Latino</i> and <i>Not Hispanic or Latino</i> .

## Web Page Fields

<b>Item</b>	<b>Description/Source Information</b>
Race	<p>User's race(s). Multiple values can be selected.</p> <p>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 checkbox is checked.</p>

## Buttons/Icons on This Page

<b>Button/Icon</b>	<b>Action</b>
Submit	Saves the values to Banner and returns the user to the Personal Information menu.

## Setup Requirements

<b>Item</b>	<b>Description</b>
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

<b>Item</b>	<b>Description</b>
Ethnicity	Stored in the SPBPERS table.
Race	Stored in the GORPRAC table.

## Links to Other Web Pages

<b>This Link</b>	<b>Action</b>
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`

# 4 Web General Packages

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## Packages

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The following packages support Web General processing.

- BWGKOADR—processes the Address, Telephone, and E-mail pages for the web
- BWGKOEMR—processes the Emergency Contact pages for the web
- BWGKOGAD—processes the Address, Telephone, and E-mail pages for the web
- BWGKOINF—displays the instructions for name or SSN updates
- BWGKOMAR—provides for the Marital Status view and update functions
- BWGKOMRE—processes the ethnicity and race survey
- BWGKOPRF—provides the Directory Profile Functions
- BWGKORAC—processes the ethnicity and race survey
- BWGKSRVY—provides survey handling processes for Web General

## Credit Card Payment Processing

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The following packages are used with web credit card payment processing. Please refer to *Payment Processor Connection Handbook* for more information about these packages.

- BWGKCCRD
- BWGKTPAY
- BWGKEPAY
- BWGKIPAY
- BWGKCPAY
- BWGKJPAY

# Integration with Banner APIs

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Web General packages work with the Banner Application Program Interfaces (APIs) that were introduced in Banner 7.0. Program logic that appeared in the Web General packages prior to release 7.0 is now in Banner APIs.

The APIs used by Web General include:

- Address (gb\_address)
- Telephone (gb\_telephone)
- E-mail (gb\_email)
- Biographical/Demographic (gb\_bio)
- Emergency Contact (gb\_emergency\_contact)

Validation logic previously found in the following Web General packages is now managed by Banner APIs.

- The `bwgkoadr.sql/bwgkoad1.sql` package has been changed to call the Address, Telephone, and E-mail APIs.
- The `bwgkoemr.sql/bwgkoem1.sql` package has been changed to call the Emergency Contact API.
- The `bwgkogad.sql/bwgkoga1.sql` package has been changed to call the Address, Telephone, and E-mail APIs.
- The `bwgkomar.sql/bwgkoma1.sql` package has been changed to call the Biographical/Demographic API.

# Luminis Channels for Banner

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Clients who have implemented Luminis® and the Self-Service products can use the Luminis Channels for Banner first delivered with Banner 7.0.

The `bwgcbref.sql/bwgcbre1.sql` package provides the business logic for the My Reports channel. The `bwgcxchn.sql/bwgcxch1.sql` package generates the XML for the General channels using business logic defined in `bwgcbref.sql/bwgcbre1.sql`. The My Banner channel uses the existing business logic in the GUKMENU package.

Refer to the *Luminis Channels for Banner Handbook* for more information.

# Index

## A

address information  
    deleting **3-20**  
    updating **3-15, 3-18**  
Address Role Privileges Form (GOAADRL)  
    **3-12, 3-13, 3-20**  
address type **3-12**  
APACONS Constituent Information Form  
    **3-30**  
APANAME Constituent/Organization Form  
    **3-30**

## C

Constituent Information Form (APACONS)  
    **3-30**  
Constituent/Organization Form (APANAME)  
    **3-30**  
credit card processing **4-1**

## D

Directory Options Rule Form (GOADIRO)  
    **3-29**  
directory profiles  
    controlling the contents of **3-29**  
    creating **3-28**  
    role-specific items **3-29**  
disabling a web account **3-3, 3-5**

## E

E-mail Address Form (GOAEMAL) **3-27**  
E-mail Address Type Validation Form  
    (GTVEMAL) **3-24, 3-25, 3-26**  
e-mail addresses  
    deleting **3-26**  
    preferred **3-26**  
    reactivating **3-27**  
    updating **3-24, 3-26**  
    viewing **3-23**

e-mail type **3-23**  
Emergency Contact Form (SPAEMRG) **3-33, 3-34, 3-36**  
emergency contact information  
    changing priorities **3-35**  
    creating **3-34**  
    updating **3-33, 3-34**  
    viewing **3-33**  
Employee Jobs Form (NBAJOBS) **3-30**  
enabling a web account **3-3, 3-5**  
error messages **3-6, 3-15, 3-17, 3-22, 3-24, 3-25, 3-28, 3-37**

## F

forms  
    APACONS Constituent Information Form  
        **3-30**  
    APANAME Constituent/Organization  
        Form **3-30**  
    GOAADRL Address Role Privileges  
        Form **3-12, 3-13, 3-20**  
    GOADIRO Directory Options Rule Form  
        **3-29**  
    GOAEMAL E-mail Address Form **3-27**  
    GOATPAC Third Party Access Form **3-3, 3-4, 3-6, 3-42**  
    GOATPAD Third Party Access Audit  
        Form **3-3, 3-6, 3-8, 3-9, 3-11, 3-42**  
    GTVEMAL E-mail Address Type  
        Validation Form **3-24, 3-25, 3-26**  
    NBAJOBS Employee Jobs Form **3-30**  
    SGASTDN General Student Form **3-29, 3-30**  
    SPAEMRG Emergency Contact Form  
        **3-33, 3-34, 3-36**  
    SPAIDEN Identification Form **3-3, 3-4**  
    SPAPERS General Person Form **3-7, 3-38**  
    STVMRTL Marital Status Code Validation  
        Form **3-38**

## G

---

General Person Form (SPAPERS) **3-7, 3-38**  
General Student Form (SGASTDN) **3-29, 3-30**  
GOAADRL Address Role Privileges Form **3-12, 3-13, 3-20**  
GOADIRO Directory Options Rule Form **3-29**  
GOAEMAL E-mail Address Form **3-27**  
GOATPAC Third Party Access Form **3-3, 3-4, 3-6, 3-42**  
GOATPAD Third Party Access Audit Form **3-3, 3-6, 3-8, 3-9, 3-11, 3-42**  
GOBSRVR Survey Response Header Table **3-11**  
GORSRVR Survey Responses Repeating Table **3-11**  
GTVEMAL E-mail Address Type Validation Form **3-24, 3-25, 3-26**

## I

---

Identification Form (SPAIDEN) **3-3, 3-4**  
Info Text  
    name change information page **3-39**

## L

---

last web access **3-5**  
login  
    unsuccessful **3-7**  
    verification **3-4**  
login process **3-4**

## M

---

Marital Status Code Validation Form (STVMRTL) **3-38**  
marital status information  
    updating **3-38**  
    viewing **3-38**

## N

---

name change information page **3-39**  
NBAJOBS Employee Jobs Form **3-30**

## P

---

phone information  
    deleting **3-20**  
    updating **3-15, 3-18**  
PIN Hint Question **3-3, 3-11**  
PIN Hint Response **3-3, 3-11**  
PINs  
    auto-expire for all end user accounts **3-4, 3-5**  
    changing **3-42**  
    disabling **3-3, 3-5**  
    expiration **3-4, 3-5, 3-6**  
    historic information **3-43**  
    re-establishing **3-3**  
    using **3-3**  
primary phone **3-20**

## R

---

role rules **3-12**

## S

---

Secure Access **3-12**  
Secure Area **3-2**  
security **3-2**  
SGASTDN General Student Form **3-29, 3-30**  
Social Security Administration **3-39, 3-41**  
Social Security Number change information page **3-40**  
Social Security Online **3-39, 3-41**  
SPAEMRG Emergency Contact Form **3-33, 3-34, 3-36**  
SPAIDEN Identification Form **3-3, 3-4**  
SPAPERS General Person Form **3-7, 3-38**  
STVMRTL Marital Status Code Validation Form **3-38**  
Survey Response Header Table (GOBSRVR) **3-11**  
Survey Responses Repeating Table (GORSRVR) **3-11**

## T

---

tables

GOBSRVR Survey Response Header  
Table **3-11**  
GORSRVR Survey Responses  
Repeating Table **3-11**  
TWGBWRUL Web Rules Table **3-4, 3-5,**  
**3-8**  
Terms of Usage  
displaying **3-8**  
redisplaying **3-9**  
Third Party Access Audit Form (GOATPAD)  
**3-3, 3-6, 3-8, 3-9, 3-11, 3-42**  
Third Party Access Form (GOATPAC) **3-3,**  
**3-4, 3-6, 3-42**  
TWGBIMAG **3-39, 3-41**  
TWGBIMAG table **3-18**  
TWGBWRUL Web Rules Table **3-4, 3-5, 3-8**

## U

---

United States Postal Service web site  
deleting link **3-18**  
unlisted telephone numbers **3-28**  
User Logout page **3-45**

## V

---

Veterans  
classifying **3-43**  
Veteran Classifications **2-14**

## W

---

Web General  
overview **3-10**  
Web Rules Table (TWGBWRUL) **3-4, 3-5, 3-8**  
Web Tailor  
overview **2-1**



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