Banner General Application Profile

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**Application Overview**

1.1 **Purpose of Application:**
The Banner application serves as the University of Alabama’s primary Enterprise Resource Planning application. The application contains many modules in Internet Native Banner and Self-Service Banner: Accounts Receivables (AR), Finance (Fin), Financial Aid (FinAid), General, Human Resources (HR), Student, Travel and Expense Management (TEM), and Workflow.

1.2 **Business Drivers:**
This application supports many administrative business processes. The system also provides the ability to manage staff and students within the University.

1.3 **Roles and Responsibilities:**
- EDAS Development Team manages the Application Server Support.
- EDAS Data Resources Team manages the Databases.
- EDAS Business Admin Team manages the functional application support.
- Other roles include
  - **Data Stewards**
    - Banner HR Greg Gaddis
    - Banner Student Ken Foshee
    - Admissions UG Teri Terry, GR Libby Williams, Law LLM Dan Powell, Law JD Claude Reeves
    - Banner AR Sylvia Fulgham
    - Banner Finance Julie Shelton & Kevin Stevens
    - Banner Financial Aid Janet Foster
  - **Business Owner**
    - Banner HR Greg Gaddis and Susan Lee
Because General affects all parts of Banner, Data Stewards from all departments have to be involved and consulted when changes/upgrades affect General.

1.4 Roadmap:
The University will continue to upgrade each module as requested by customers based on Ellucian release schedule. The updates are released typically twice per year as a bundle upgrade.

1.5 Components:

Main Banner System
The two main components of Banner are:

- **Self Service Banner** - Pages linked from myBama that allow users (i.e. students) update information.
- **Internet Native Banner** - Tool utilizing Oracle Forms which allows UA faculty/staff to update data in the Banner system.
- Dependencies/Integrations with other Applications
  - APEX Administration

General is comprised of three main modules:

- Banner General
- Banner Web General
- Banner Web Tailor

Additional Modules:

OIT also utilizes various Banner related modules that utilize the primary INB and SSB Banner Systems.

These include but are not limited to the following:

- Banner Workflow
- Banner Travel and Expense Management
- Banner Accounts Receivables
- Banner HR Benefits
- Banner HR Payroll
- Banner HR Position Control
- Banner Student
- Banner Learn Adapter
1.6 System Diagrams:

**System Overview**

The General System contains the modules that are common to all the Banner application systems:

<table>
<thead>
<tr>
<th>Student</th>
<th>Accounts Receivable</th>
<th>Financial Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Resources</td>
<td>Advancement</td>
<td>Finance</td>
</tr>
</tbody>
</table>

**Banner Application Systems**

**General System Modules**

- Job Submission
- Population Selection
- Letter Generation
- System Functions/Administration
- Event Management
- General Web Management
- General International Management
- General VR Management
- Business Rule Builder

**Oracle**

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**Disaster Recovery Information**

2.1 Disaster Recovery Overview

The Banner system is currently replicated at the Atlanta disaster recovery site. Data is transferred on average every fifteen minutes to the DR site as archive logs at UA fill up and "roll over" to the DR database. As well, the Banner system is backed-up via physical tape drive.

2.2 Administration and Authentication

In the event of a DR situation, the onsite LDAP authentication method will be switched to a CAS authentication server in Atlanta.

2.3 Notification System

**Banner DR Notification:** Emails and text alerts will be sent out to employees and system administrators that utilize the Banner system. This alert will inform users that the University is under a disaster recovery situation and current Banner processes will be running from the Atlanta DR site until a specified time.
Applications Connecting to Banner: Email and text alerts will be sent out to application users and administrators running systems that connect to the banner database. This notification will instruct application owners to point their applications to reference the DR Banner databases in Atlanta.

2.4 Switchover Plan
The Systems team will initiate the steps whereby ensuring all the necessary core dependencies are available for the Banner system. At this point the Data Resources team in Enterprise Development and Application Support (aka EDAS) will start the Banner database in Atlanta. Other EDAS staff will redirect all Banner dependent applications to the DR site. Tests will then be performed to ensure everything is working properly.

Switchover Checklist

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Systems will ensure all necessary core dependencies are available for the Banner system (LDAP, Firewall, Load Balancer)</td>
<td>Systems Team</td>
</tr>
<tr>
<td>2.</td>
<td>System team will ensure the storage is up and running correctly</td>
<td>Data Resources Team</td>
</tr>
<tr>
<td>3.</td>
<td>The primary database at UA will be switched to become the standby database. The primary database at the Atlanta DR site will be switched to become the primary.</td>
<td>DBA – Debbie Walsh</td>
</tr>
<tr>
<td>3.1</td>
<td>On Primary and standby: Verify Primary and Standby TEMP Files Match</td>
<td>DBA – Debbie Walsh</td>
</tr>
<tr>
<td>3.2</td>
<td>Verify redo is current on standby</td>
<td>DBA – Debbie Walsh</td>
</tr>
<tr>
<td>3.3</td>
<td>On primary: (Verify the Physical Standby Database Is Performing Properly)</td>
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<td>3.4</td>
<td>On primary: Verify it is possible to perform a switchover.</td>
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<tr>
<td>3.5</td>
<td>Initiate the switchover on the primary database.</td>
<td>DBA – Debbie Walsh</td>
</tr>
<tr>
<td>3.6</td>
<td>Shut down and restart the former primary instance.</td>
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<tr>
<td>3.7</td>
<td>Turn off archivelog shipping.</td>
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<td>3.8</td>
<td>Switch the target physical standby database role to the primary role.</td>
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<tr>
<td>3.9</td>
<td>Finish the transition of the standby database to the primary role.</td>
<td>DBA – Debbie Walsh</td>
</tr>
<tr>
<td>3.10</td>
<td>On now standby (old primary): (start receive of archivelogs)</td>
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<tr>
<td>3.11</td>
<td>On new primary at DR: (start send of archivelogs)</td>
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<td></td>
<td>AppWorx will be tested against the Banner System for functionality</td>
<td>Robert Harris</td>
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<td>Application Servers will be brought up and made live for production</td>
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<td>The databases will be recovered from the latest update and made available to production status</td>
<td>DBA – Debbie Walsh</td>
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Robert Harris

Systems Team