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**South Dakota Board of Regents**  
**Modification Id: SDBOR 006**  
**Third Party ID**  
**General**  
**Functional Specification**

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# **1 Distributed Banner Form-Object Security**

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## **1.1 Introduction**

This functional specification document represents the outcome of an iterative review process. It is considered a product-planning document and does not represent a commitment to develop the described software changes in the manner presented. SunGard Higher Education reserves the exclusive right to determine, in its sole discretion, the enhancements to be developed by SunGard Higher Education and the manner in which they are developed.

## **1.2 Overview**

The South Dakota Board of Regents is currently implementing Banner for multiple institutions. This multi-institutional project is extensive and will be incorporating many third party products. Three such products that are included in this project are Luminis, PeopleAdmin and HigherMarkets and there is a requirement that all three systems should be able to utilize the same third party ID as generated from the Banner system.

Each system has its own unique user ID requirements and the Banner system generation of the third party ID needs to be customized to generate a user ID that will meet the requirements of all the systems.

The South Dakota Board of Regents has identified a naming convention for third party IDs that will meet the needs of the systems to be integrated in the overall South Dakota solution.

The restrictions on the third party ID is that it must be at least 6 characters in length but no longer than 20 characters. The ID can contain only numbers, letters and underscores but no other punctuation characters are acceptable. The details of the name are included in the Modified Processes section of this specification.

## **1.3 Scope**

### **1.3.1 Product Release**

<b>Module</b>	<b>Release Number</b>
SunGard Higher Education Banner® General	7.2

### 1.3.2 Assumptions

1. All customizations will be developed and delivered in SCT Banner® General 7.2.
2. Objects not mentioned in this Specification are outside the scope of the proposed solution. Any change in scope will be handled with a Change Request and a re-evaluation of effort.
3. SunGard Higher Education will deliver efficient, well-formed code, analyzed for optimal performance according to Oracle and SunGard Higher Education standards.
4. A single point of contact from the Client will be identified for communication during the project. This single point of contact will be responsible for all communication with SunGard Higher Education, including the review and approval of project deliverables and formal acceptance of the final product.

Client approval will be required on the following documents:

- a. Statement of Work
  - b. Milestone Document
  - c. Functional Specification
  - d. Sign Off/Acceptance
5. Failure to meet milestone dates as agreed upon in the milestones document could present a jeopardy to the project.
  6. The Client will provide SunGard Higher Education with an Acceptance Test Plan that will determine whether or not the customization meets the requirements outlined in the functional specification.
  7. SunGard Higher Education will test the customization prior to delivery; however, it is the responsibility of the Client to thoroughly test the customization within the testing period allowance (30 days from the date of delivery of the customization).
  8. The project will be considered accepted and complete 30 days from initial delivery, if there are no outstanding defects and a signed acceptance agreement has not been obtainable. However, a signed acceptance agreement is required before any modification is eligible for maintenance through Customization Services.
  9. The Client is responsible for the installation of the software delivered by SunGard SCT.
  10. The Client is responsible for data set up required by the customization.
  11. End user training, beyond the delivered documentation, is not part of this estimate. General Security training will be dealt with as part of the South Dakota implementation.
  12. Maintenance is not included in this Statement of Work. After original project sign off is submitted, a separate maintenance agreement is required if the Client wishes to put the customization under a maintenance contract.
  13. SunGard Higher Education will perform all work off campus. On-site, campus visits are outside the scope of this estimate.
  14. Travel and expenses are not included in the estimate of effort associated with this document
  15. Only the function that generates the Third Party ID needs to be customized, all other requirements for communicating the Third Party ID to the other products will be accomplished either through baseline Banner functionality or through customizations that are not covered in this scope of work.

### 1.3.3 Exclusions

Not Applicable.

1.3.4 Concerns  
Not Applicable.

1.3.5 Terminology  
Not Applicable.

1.3.6 Security  
Not Applicable.

1.3.7 Site Policy Impact  
Not Applicable.

## **1.4 Functionality**

### 1.4.1 Functional Process Flow

The functionality that follows will describe how to establish a Third Party ID.

1. Establish Enterprise PIN Preferences controls on the GUAPPRF form. This form will control when the PIN record and Third Party ID will be created based upon the creation of records in various tables. For example, when a new student record is created in SGBSTDN a PIN record should also be created.
2. View or maintain individual PIN and Third Party ID records on the Third Party Access form (GOATPAC) or Third Party Access Audit form (GOATPAD).

1.4.2 New Human Computer Interactions (HCI)/Forms  
Not Applicable.

1.4.3 Modified Human Computer Interactions (HCI)/Forms  
Not Applicable.

1.4.4 New Web Applications  
Not Applicable.

#### 1.4.5 Modified Web Applications

Not Applicable.

#### 1.4.6 New Processes

Not Applicable.

#### 1.4.7 Modified Processes

GOKTPTY - Third Party ID creation process

This procedure generates the Third Party ID when the PIN record is created. The procedure will be modified to create the Third Party ID with the following constraints:

- Position 1 - will be the person's first name initial. If there is no first letter of the person's first name, or that character is an invalid character for the naming convention, a zero (0) will be substituted.
- Position 2 - will be the person's middle initial if it exists, if the person does not have a middle initial, or that character is an invalid character for the naming convention, then the second character of the person's first name is to be used. If there is no second letter of the person's first name a zero (0) will be substituted.
- Positions 3 – 20 – will be the person's last name in its entirety if it fits, else trimmed to fit.
- If the user name is shorter than 6 characters using this convention then the name will have "01" appended, using one or more "0"'s as needed to reach the minimum (example Jane Audrey Doe would be jadoe01). If this username is already taken, than use the incremental option as listed below. (example: James Allen Doe would be jadoe02).

If the ID has already been used for another user then the last two characters of the ID will be trimmed and a one-up incremental will be used beginning with 01 through 99. If 99 is reached without still defining a unique ID then the last three characters of the ID will be trimmed and a one-up incremental will be used beginning with 100 through 999.

Example: if there is a second Jane Johnson without a middle name, her third party ID would be jajohnson02.

Examples of usernames generated from this product:

- Ryan M McGarry: rmmcgarry
- Julie Kotschegarow: jukotschegarow
- Bi Ying Lio: bylio01
- John A Doe: jadoe01
- James A Doe: jadoe02
- Jane Doe: jadoe03
- John A Johnson: jajohnson
- Jane Johnson: jajohnson01
- Paul J Hasaverylonglastname: pjhasaverylonglastna
- János Bolyai: jabolyai



- Prince: 00prince

1.4.8 New Reports  
Not Applicable.

1.4.9 Modified Reports  
Not Applicable.

1.4.10 New Reporting Structures  
Not Applicable.

1.4.11 Modified Reporting Structures  
Not Applicable.

## **1.5 Database**

1.5.1 New Tables  
Not Applicable.

1.5.2 Modified Tables  
Not Applicable.

1.5.3 New Views  
Not Applicable.

1.5.4 Modified Views  
Not Applicable.

1.5.5 New Functions  
Not Applicable.

1.5.6 Modified Functions  
Not Applicable.

1.5.7 New Procedures  
Not Applicable.

1.5.8 Modified Procedures  
Not Applicable.

1.5.9 New Packages  
Not Applicable.

1.5.10 Modified Packages  
Not Applicable.

1.5.11 New Other  
Not Applicable.

1.5.12 Modified Other  
Not Applicable.

## **2 Cross Enterprise Considerations**

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2.1.1 Campus Pipeline/Luminis  
Not Applicable.

2.1.2 SunGard SCT Workflow Examples  
Not Applicable.

2.1.3 WebCT Interface Processes  
Not Applicable.

2.1.4 Learning Systems  
Not Applicable.

2.1.5 Other Interfaced Systems

Not Applicable.

**3 Contract Information**

Modification Data	
	Initial Proposal Date: Product(s) Targeted for Modification: Intended Release:
Institutional Data	
	Product(s) Currently in Use:
Client Contact(s)	
1.	Last Name: First Name: Telephone Number: Email Address:
2.	Last Name: First Name: Telephone Number: Email Address:

## **4 Approval to Proceed**

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The signatures below indicate that SDBOR 006 Third Party ID Specification 1.00.doc meets the approval of the undersigned and thereby grants SunGard SCT the approval to proceed.

Please fax this approval page to Melissa Shearer at 610-578-3110.

\_\_\_\_\_  
Signature Date

Print Name:
Print Title:

\_\_\_\_\_  
Signature Date

Print Name:
Print Title:

## **5 Document History**

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### **Revision Record**

<b>Number</b>	<b>Date and Sections</b>	<b>Author</b>	<b>Notes</b>
1.0	05/19/2006	Melissa Shearer	Original Specification

## 6 Acronyms

Acronym	Description
AMC	Account Management Council
AMM	Account Management Methodology
CAM	Client Account Management
CDM	Common Development Methodology
CMS	Common Star
CSM	Common Services Methodology
PEG	Process Engineering Group
PMC	Project Management Council
PMM	Project Management Methodology
ProNet	SunGard SCT's Process Network
PTDB	Project Tracking Database
RPE	Request for Product Enhancement
SPG	Software Process Group
SQ&P	Services Quality and Processes

## 7 Definitions

Term	Definition