Banner Student
Student Self-Service Training Workbook

Release 8.2 - June 2009
Updated 9/21/2009

SUNGARD HIGHER EDUCATION

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Revision History Log

Publication Date	Summary
June 2009	New version that supports 8.2 software.

Notice of rights

Think before you print.

Table of Contents

Note: Effective with the 8.0 release of Student Self Service, Financial Aid Self Service is a stand-alone product. The section covering the Financial Aid Self-Service pages has been removed from this workbook. Refer to the Banner Financial Aid Self-Service User Guide for information about that product.

Introduction

Course goal

This course is intended to familiarize you with Banner Self-Service for Students. You will learn to identify primary functions offered in Banner Student and will follow the processes necessary to enter appropriate information into Banner via the Web.

The workbook is divided into three sections:

- Introduction
- Set Up
- Day-to-Day Operations

Objectives

At the end of this section, you will be able to use Banner to set up

- both non-secured and secured access to Student Self-Service for the student community
- the Student Self-Service registration feature on a term-by-term basis
- the Student Self-Service registration, add and drop, and search for course features
- the Student Self-Service Graduation Application
- rules governing the address types that may be updated using Student Self-Service
- the WebCAPP feature
- functional aspects of WebTailor.

Note: Credit card payments for registration fee charges may be used with Self-Service for Students. Please refer to the *Web Credit Card Payments Handbook* for detailed information and procedures.

Intended audience

Individuals from the Registrar's Office, IT department, and faculty who are responsible for deciding what processes and features of Banner will be accessible on the web.

Prerequisites

To complete this section, you should have

- completed the Education Practices computer-based training (CBT) tutorial "Banner 8 Fundamentals," or have equivalent experience navigating in the Banner system

- administrative rights to create the rules and set the validation codes in Banner

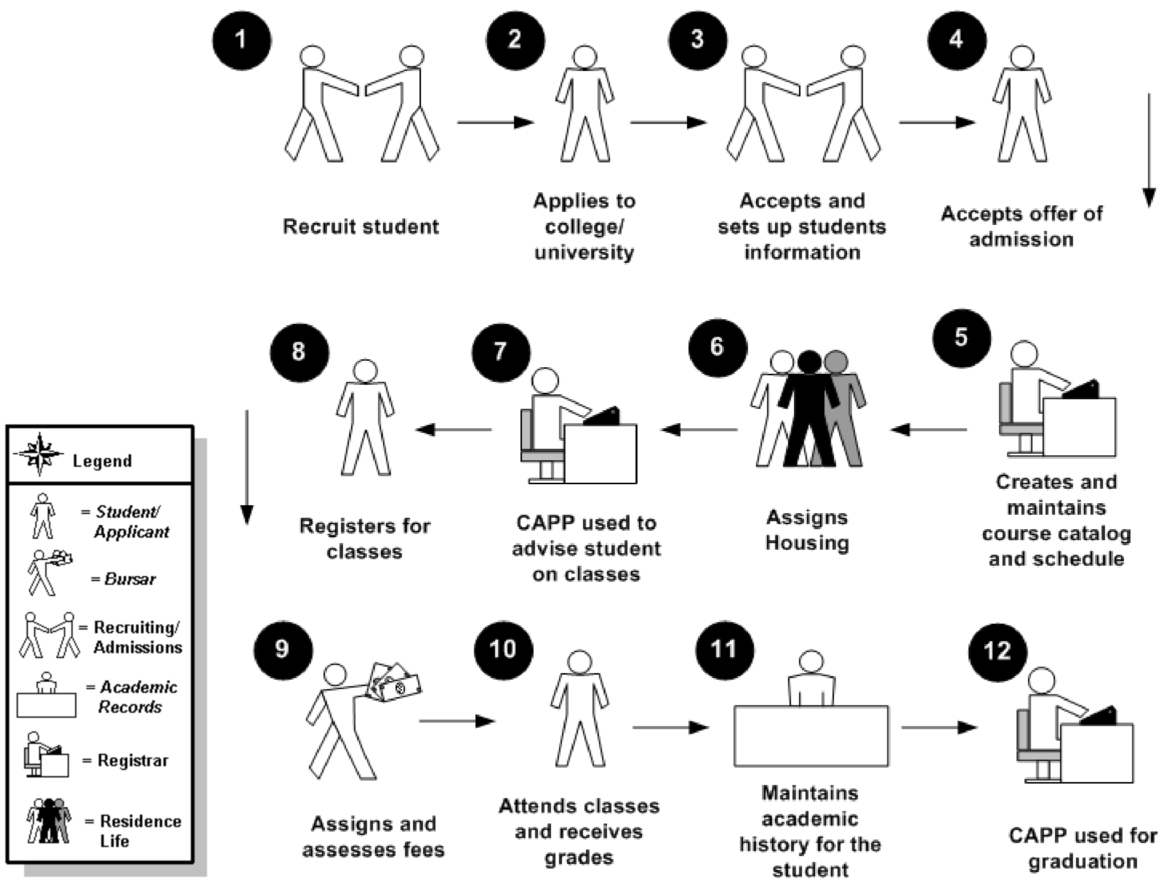
Process Introduction

Introduction

The Student Self-Service application allows students to view, update, and print records from the Banner Student database using Web technology. It also provides a Web interface for potential students to review the course catalog and class schedule. Hypertext capabilities provide easy navigation through the Student Self-Service Web pages, including complex transactions such as registering for classes.

Flow diagram

This diagram represents an overall process of the stages that could occur at your institution.



About the process

Rule and validation forms are set up on the Banner system. Unless a new code is required, this step is only performed once.

The person/employee will work with term selection, student schedules and be responsible for providing web access.

The person/employee will be responsible for setting up registration options, student records, WebCAPP, and web-enabling fee assessment and credit card functionality.

The person/employee will set up personal information and work with registration, add/drop and withdrawal processing.

Set Up

Introduction

The purpose of this section is to outline the setup process and detail the procedures to set up your Banner system to enable students to view personal data, registration information, and student records on the Web.

Objectives

In this section you will learn how to use Banner to set up

- both non-secured and secured access to Student Self-Service for the student community
- the Student Self-Service registration feature on a term-by-term basis
- the Student Self-Service registration, add and drop, and search for course features
- rules governing the address types that may be updated using Student Self-Service
- the WebCAPP feature
- functional aspects of WebTailor.

Note: Credit card payments for registration fee charges may be used with Self-Service for Students. Please refer to the *Web Credit Card Payments Handbook* for detailed information and procedures.

Validation, Rule, and Forms that Control Student Self Service

Introduction

Existing Banner validation tables, forms, and rules must be set up or created to accommodate Web processing.

Validation, rules, and control forms

These forms are used to set the parameters in Banner for options in Student Self-Service. The forms are listed on the pages that follow. Some of these forms will be covered in later procedures.

Form Description	**Banner Name**
Term Control	SOATERM
Subject Code Validation	STVSUBJ
Web Display List Customization	SOAWDSP
Crosswalk Validation	GTVSDAX
Schedule	SSASECT
Course Registration Status Code Validation	STVRSTS
Schedule Processing Rules	SSARULE
Section Web Control	SSAWSEC
Registration Group Control	SFARCTL
Registration Priority Control	SFARCTT
Student Registration Group	SFARGRP
Third Party Registration Time Controls	SFARGTC
Alternate Personal ID Number	SPAAPIN

Form Description	Banner Name
Registration Permit-Override Code Validation	STVROVR
Hold Type Code Validation	STVHLDD
Transcript Type Code Validation	STVTPRT
Transcript Type Rules	SHATPRT
Web Self-Service Options Validation	STVWSSO
Web Payment Options Validation	STVWPYO
Web Transcript Request Rules	SHAWTRR
Degree Code Validation	STVDEGC
Source/Background Institution Code Validation	STVSBGI
Letter Code Validation	GTVLETR
HTML Letter Module Validation	STVELMT
Format HTML Letter Rules	SOAELTR
E-mail Address Type Code Validation	GTVEMAL
Program Definition Rules	SMAPRLE
Program Requirements	SMAPROG
Compliance Default Codes Validation	STVDFLT
Curriculum Rules	SOACURR
WebCAPP Rules	SMAWCRL
Compliance Default Parameters	SMADFLT
Originator Code Validation	STVORIG
Compliance Print Code Validation	STVPRNT
Process Control Code Validation	STVPROC
Student Status Code Validation	STVSTST

Displaying New Person Fields for Internationalization

Introduction

A major initiative of SunGard Higher Education is to make Banner more adaptable for use in different countries and with different languages. This ongoing effort is called internationalization (often abbreviated I18N).

As part of this initiative, Banner Student 8.0 delivered several new fields in the database. These fields, however, were not visible on the user interface. With Banner Student 8.2, these new fields can be displayed on forms and reports. This enhancement provides worldwide clients with a more robust, accurate, and efficient method of storing personal data.

New person fields

The following person fields are now available on several Banner Student Forms and reports:

Field	Length	Description
Last Name Prefix	60 characters	Prefix that precedes a last name (for example, “Von” in the last name “Von Hintz”)
House Number	10 characters	Unique number assigned to each building on a street or in an area and used as part of the postal address in some countries (no validation)
Street Line 4	75 characters	Additional street address (no validation)
Telephone Country Code	4 characters	Code that designates the region and country of the telephone number (no validation)

Masked fields

Some users do not need these new fields on Banner forms. For this reason, Banner Student 8.2 is being delivered with masking rules turned on for these new fields. This means the fields are not displayed on forms when you first upgrade to Banner Student 8.2. If you want to display the new fields, you can do one of the following:

- Run the gssmask.sql script, delivered with Banner General 8.2, to unmask the new fields. Refer to the *Banner General 8.2 Release Guide* for more details.
- Use the Data Display Mask Rules Form (GORDMSK) to unmask the fields. You can unmask specific fields on specific forms. Refer to the *Banner General Data Security Handbook* for more details.

Masking rules apply only to name fields when they are displayed independently (that is, not concatenated). If fields are concatenated, the masking rules do not apply. It is assumed that the fields where data would normally be entered would be masked, preventing data entry. As a result, no values would be available for display on forms when the fields are concatenated.

Changed forms

Several forms can display the new person fields. Some forms display all new person fields; other forms display some of the new person fields. In general, the new person fields are displayed on forms as follows:

- **Last Name Prefix** is displayed before the **Last Name** field.
- **House Number** is displayed before the **Street Line 1** field.
- **Street Line 4** is displayed after the **Street Line 3** field. (If a form does not include Street Line 3, then Street Line 4 is not included on the form.)
- **Telephone Country Code** is displayed before the **Telephone Area Code** field.

The following forms support the new person fields:

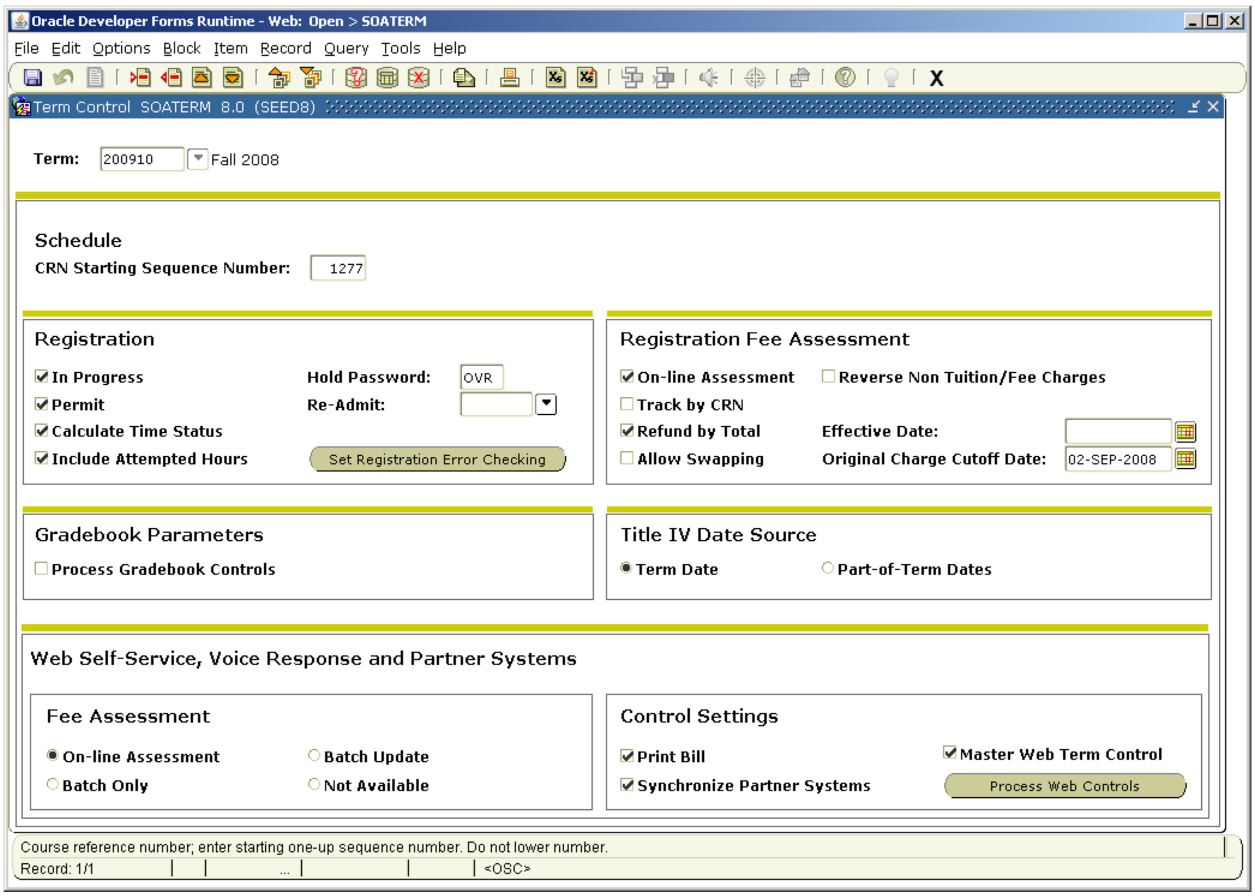
- Emergency Contact Form (SPAEMRG)
- Compliance Request Management Form (SMARQCM)
- Source or Background Institution Base Form (SOASBGI)

Term Control

Purpose

Use the Term Control Form (SOATERM) to establish controls for a specific term. These controls affect the areas of catalog, schedule, registration, registration fee assessment, and telephone registration processing.

Banner form



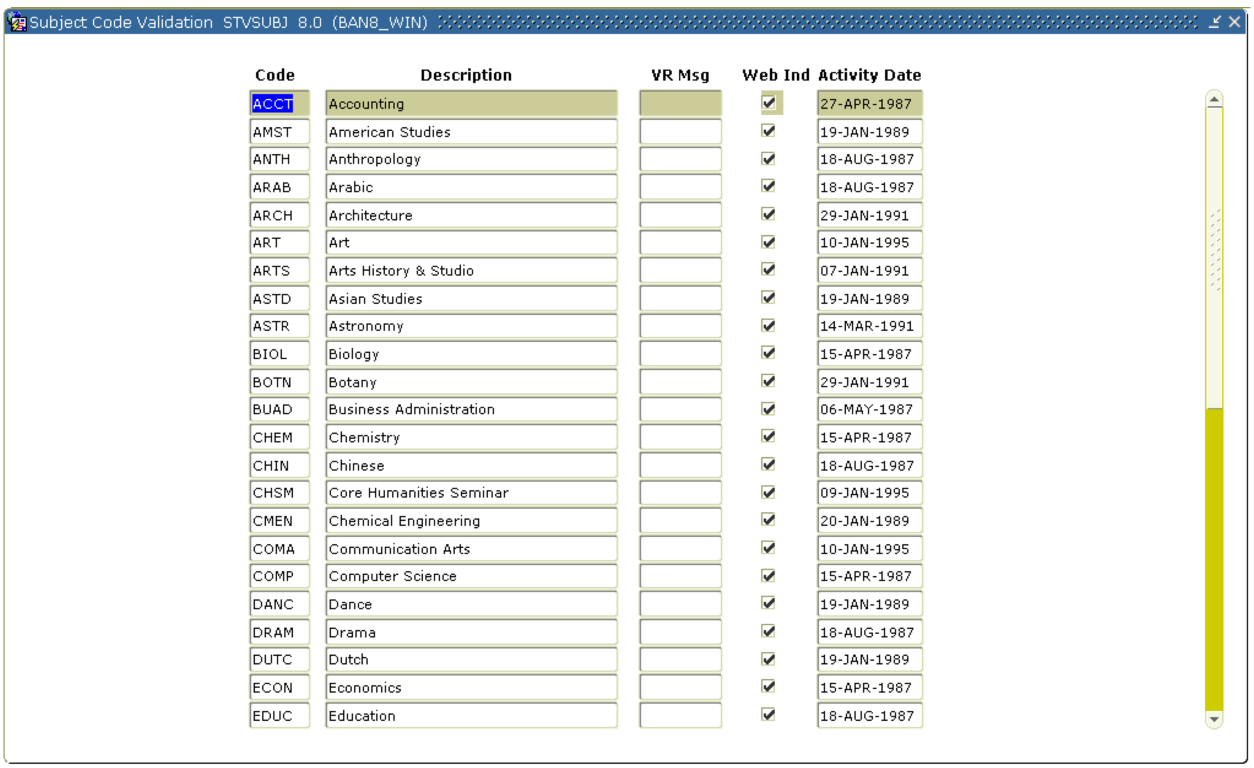
Subject Code Validation

Purpose

Use the Subject Code Validation Form (STVSUBJ) to create, update, insert and delete subject codes (e.g., *Accounting*, *Botany*, *Economics*, etc.). Several forms in the Catalog, Registration, and Academic History modules use this form to validate subject codes.

The Web Indicator checkbox is used and should be checked for all active subject codes students may use to search the course catalog and schedule.

Banner form


Subject Code Validation STVSUBJ 8.0 (BAN8_WIN)

Code	Description	VR Msg	Web Ind	Activity Date
ACCT	Accounting		✔	27-APR-1987
AMST	American Studies		✔	19-JAN-1989
ANTH	Anthropology		✔	18-AUG-1987
ARAB	Arabic		✔	18-AUG-1987
ARCH	Architecture		✔	29-JAN-1991
ART	Art		✔	10-JAN-1995
ARTS	Arts History & Studio		✔	07-JAN-1991
ASTD	Asian Studies		✔	19-JAN-1989
ASTR	Astronomy		✔	14-MAR-1991
BIOL	Biology		✔	15-APR-1987
BOTN	Botany		✔	29-JAN-1991
BUAD	Business Administration		✔	06-MAY-1987
CHEM	Chemistry		✔	15-APR-1987
CHIN	Chinese		✔	18-AUG-1987
CHSM	Core Humanities Seminar		✔	09-JAN-1995
CMEN	Chemical Engineering		✔	20-JAN-1989
COMA	Communication Arts		✔	10-JAN-1995
COMP	Computer Science		✔	15-APR-1987
DANC	Dance		✔	19-JAN-1989
DRAM	Drama		✔	18-AUG-1987
DUTC	Dutch		✔	19-JAN-1989
ECON	Economics		✔	15-APR-1987
EDUC	Education		✔	18-AUG-1987

Web Display List Customization

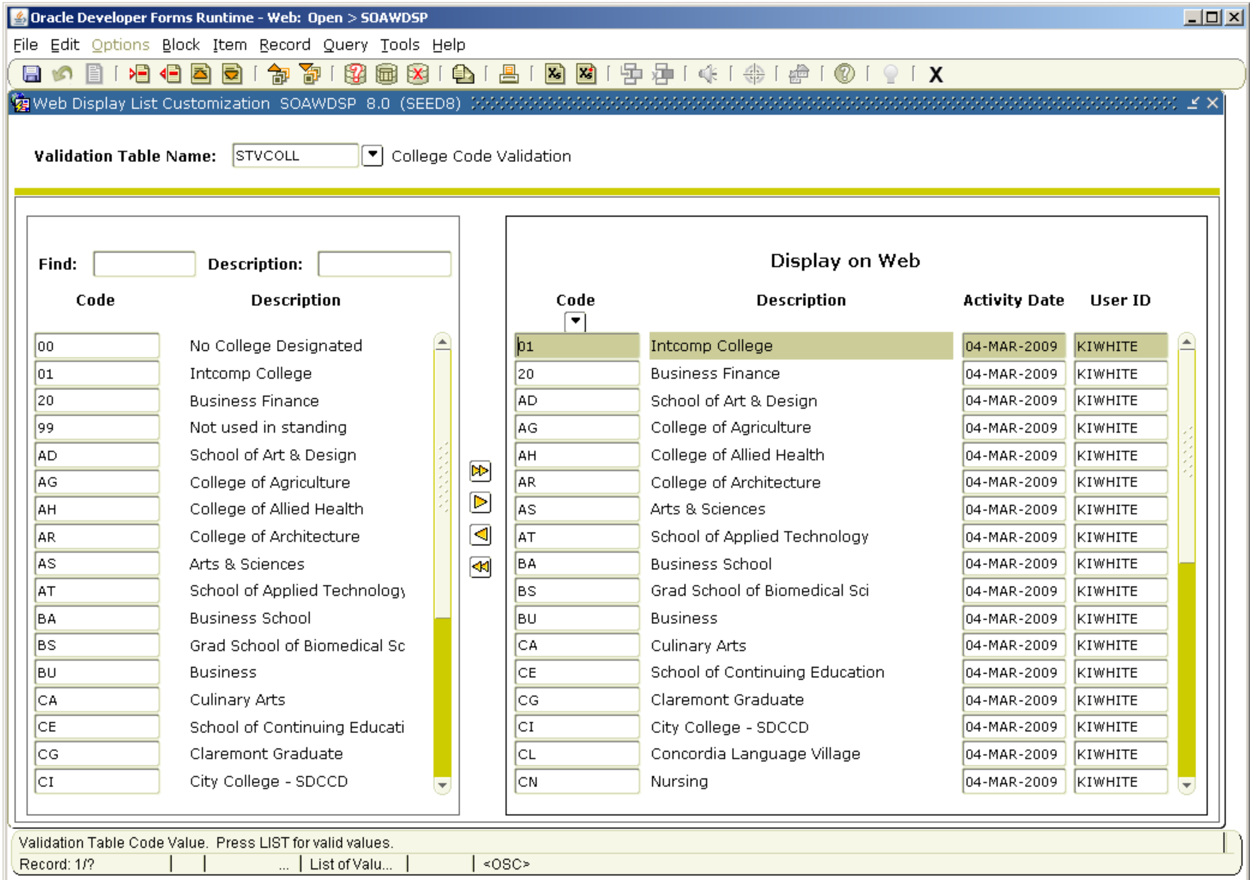
Purpose

The Web Display List Customization Form (SOAWDSP) provides the ability to define which values contained in selected validation tables should be displayed in the Self-Service products.

The validation tables are:

- Instructional Method Validation Table (GTVINSM)
- Attribute Validation Table (STVATTR)
- Campus Code Validation Table (STVCAMP)
- College Code Validation Table (STVCOLL)
- Department Code Validation Table (STVDEPT)
- Division Code Validation Table (STVDIVS)
- Level Code Validation Table (STVLEVL)
- Part of Term Code Validation Table (STVPTRM)
- Schedule Type Code Validation Table (STVSCHD)
- Session Code Validation Table (STVSESS).

Banner form



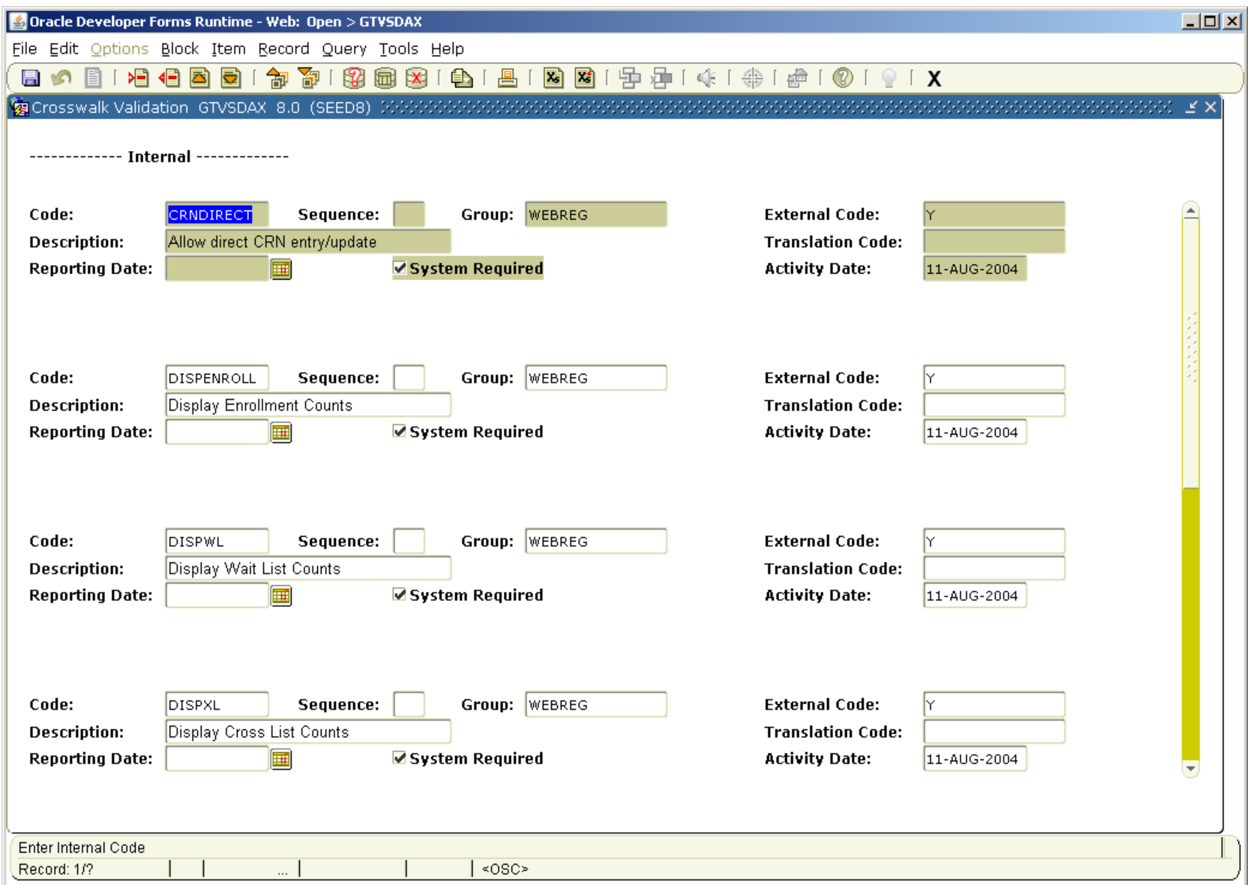
Oracle Developer Forms Runtime - Web: Open > SOAWDSP
File Edit Options Block Item Record Query Tools Help
Web Display List Customization SOAWDSP 8.0 (SEED8)
Validation Table Name: STVCOLL
College Code Validation
Find:
Description:
Code
Description
00 No College Designated
01 Intcomp College
20 Business Finance
99 Not used in standing
AD School of Art & Design
AG College of Agriculture
AH College of Allied Health
AR College of Architecture
AS Arts & Sciences
AT School of Applied Technology
BA Business School
BS Grad School of Biomedical Sc
BU Business
CA Culinary Arts
CE School of Continuing Educati
CG Claremont Graduate
CI City College - SDCCD
Display on Web
Code
Description
Activity Date
User ID
01 Intcomp College 04-MAR-2009 KIWHITE
20 Business Finance 04-MAR-2009 KIWHITE
AD School of Art & Design 04-MAR-2009 KIWHITE
AG College of Agriculture 04-MAR-2009 KIWHITE
AH College of Allied Health 04-MAR-2009 KIWHITE
AR College of Architecture 04-MAR-2009 KIWHITE
AS Arts & Sciences 04-MAR-2009 KIWHITE
AT School of Applied Technology 04-MAR-2009 KIWHITE
BA Business School 04-MAR-2009 KIWHITE
BS Grad School of Biomedical Sci 04-MAR-2009 KIWHITE
BU Business 04-MAR-2009 KIWHITE
CA Culinary Arts 04-MAR-2009 KIWHITE
CE School of Continuing Education 04-MAR-2009 KIWHITE
CG Claremont Graduate 04-MAR-2009 KIWHITE
CI City College - SDCCD 04-MAR-2009 KIWHITE
CL Concordia Language Village 04-MAR-2009 KIWHITE
CN Nursing 04-MAR-2009 KIWHITE
Validation Table Code Value. Press LIST for valid values.
Record: 1/? ... List of Valu... <OSC>

Crosswalk Validation

Purpose

The Crosswalk Validation Form (GTVSDAX) matches external (user-defined) codes with internal (SunGard Higher Education-defined) codes. Using this functionality gives you the ability to customize the codes to meet your institution's specific needs. SunGard delivers the Crosswalk Validation Form (GTVSDAX) with seed data values. For the Banner products to work accurately, you must change some of the sample data in GTVSDAX to match specific code values used by your institution.

Banner form



Oracle Developer Forms Runtime - Web: Open > GTVSDAX

File Edit Options Block Item Record Query Tools Help

Crosswalk Validation GTVSDAX 8.0 (SEED8)

------------ Internal ------------

Code: CRNDIRECT Sequence: Group: WEBREG External Code: Y
Description: Allow direct CRN entry/update Translation Code:
Reporting Date: System Required Activity Date: 11-AUG-2004

Code: DISPENROLL Sequence: Group: WEBREG External Code: Y
Description: Display Enrollment Counts Translation Code:
Reporting Date: System Required Activity Date: 11-AUG-2004

Code: DISPWL Sequence: Group: WEBREG External Code: Y
Description: Display Wait List Counts Translation Code:
Reporting Date: System Required Activity Date: 11-AUG-2004

Code: DISPXL Sequence: Group: WEBREG External Code: Y
Description: Display Cross List Counts Translation Code:
Reporting Date: System Required Activity Date: 11-AUG-2004

Enter Internal Code
Record: 1/? ... <OSC>

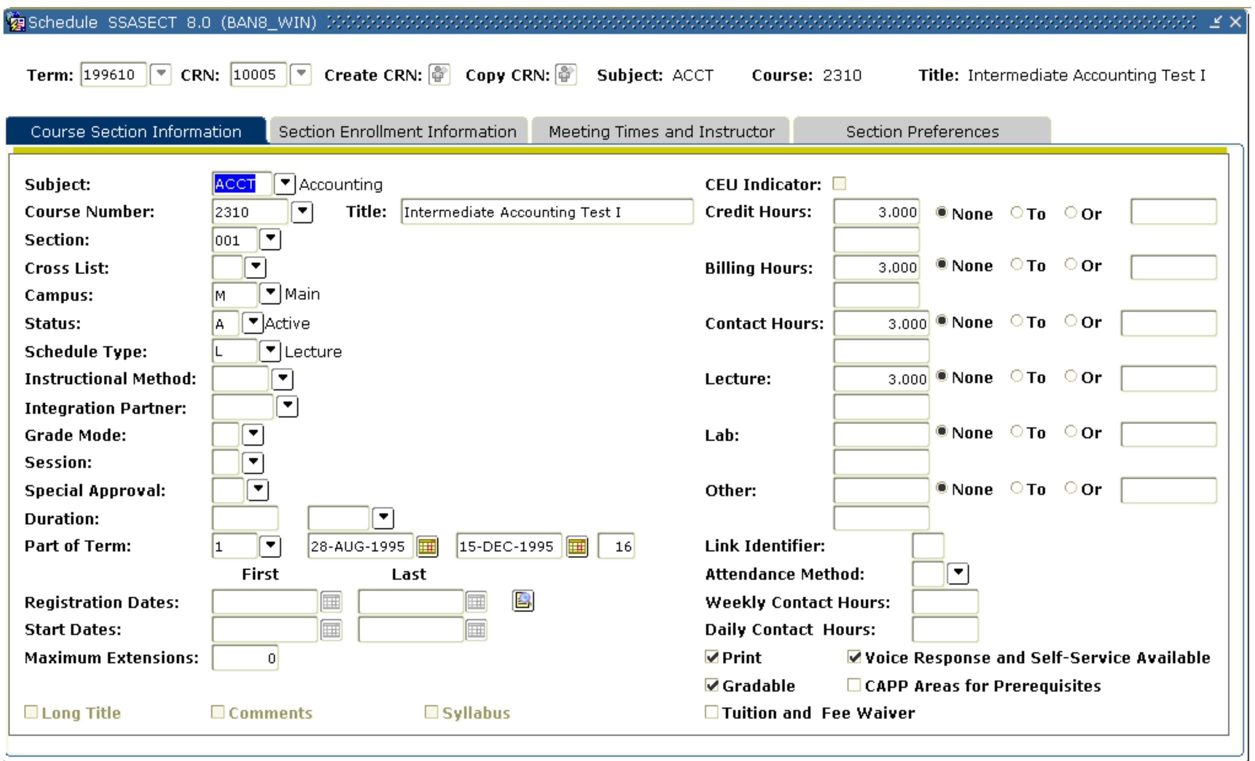
Schedule

Purpose

The Schedule Form (SSASECT) is used to create sections for the courses which were created in the Catalog module, according to the definitions and restrictions that were set up there. The Registration module then uses the sections to register students. A course catalog record must exist prior to the creation of sections for that course.

Only those sections marked as Self Service Available will be returned when queries are performed in Self Service Banner.

Banner form



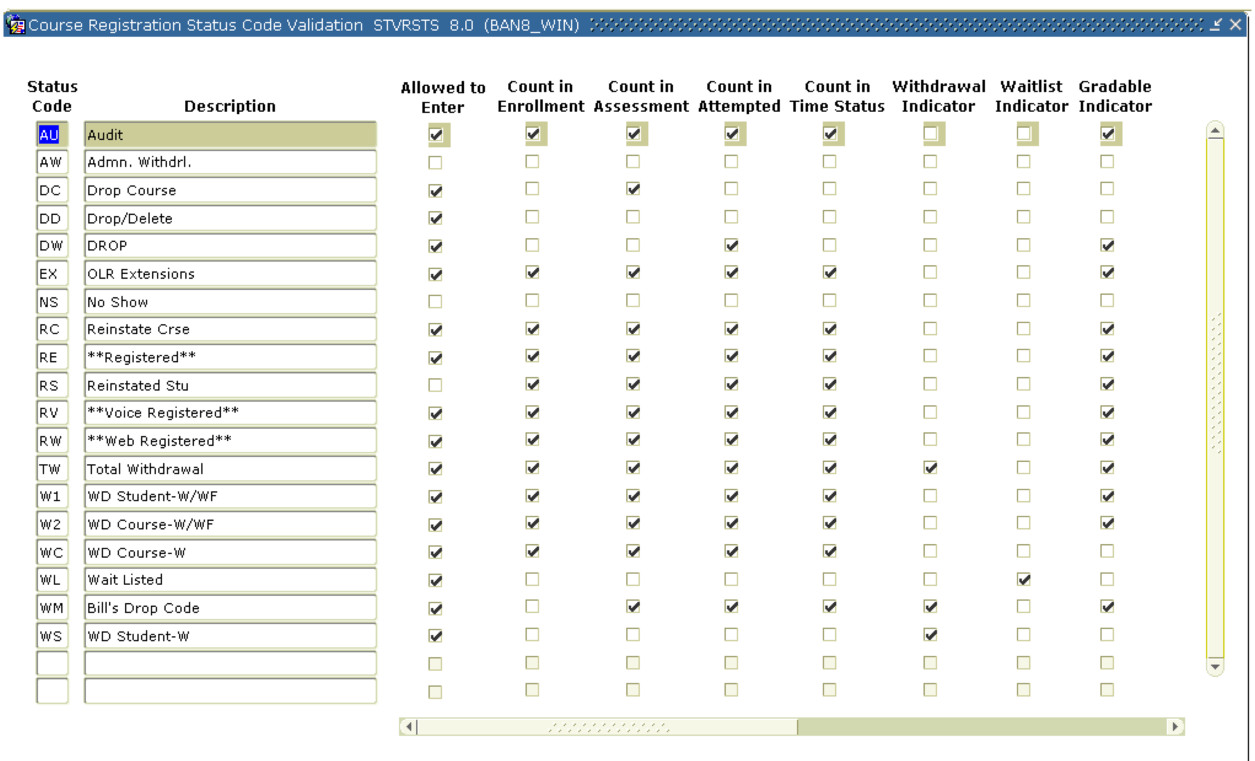
Course Registration Status Code Validation

Purpose

The Course Registration Status Code Validation Form (STVRSTS) is used to maintain codes, descriptions, and basic processing rules for statuses which will describe a person's registration in each section. Other forms use this form to validate course registration statuses. The user can set the switches to determine what the various status codes allow (i.e., count in enrollment, place on waitlist, whether the course is gradable, etc.).

Only codes marked as Print on Schedule will display on the student's Self Service schedules. Registration status codes available for use in Self Service are limited to those with the Web Indicator checked.

Banner form


Course Registration Status Code Validation STVRSTS 8.0 (BAN8_WIN)

Status Code	Description	Allowed to Enter	Count in Enrollment	Count in Assessment	Count in Attempted	Count in Time Status	Withdrawal Indicator	Waitlist Indicator	Gradable Indicator
AU	Audit	✓	✓	✓	✓	✓			✓
AW	Admn. Withdrl.								
DC	Drop Course	✓		✓					
DD	Drop/Delete	✓							
DW	DROP	✓			✓				✓
EX	OLR Extensions	✓	✓	✓	✓	✓			✓
NS	No Show								
RC	Reinstate Crse	✓	✓	✓	✓	✓			✓
RE	**Registered**	✓	✓	✓	✓	✓			✓
RS	Reinstated Stu		✓	✓	✓	✓			✓
RV	**Voice Registered**	✓	✓	✓	✓	✓			✓
RW	**Web Registered**	✓	✓	✓	✓	✓			✓
TW	Total Withdrawal	✓	✓	✓	✓	✓	✓		✓
W1	WD Student-W/WF	✓	✓	✓	✓	✓			✓
W2	WD Course-W/WF	✓	✓	✓	✓	✓			✓
WC	WD Course-W	✓	✓	✓	✓	✓			
WL	Wait Listed	✓						✓	
WM	Bill's Drop Code	✓		✓	✓	✓	✓		✓
WS	WD Student-W	✓					✓		

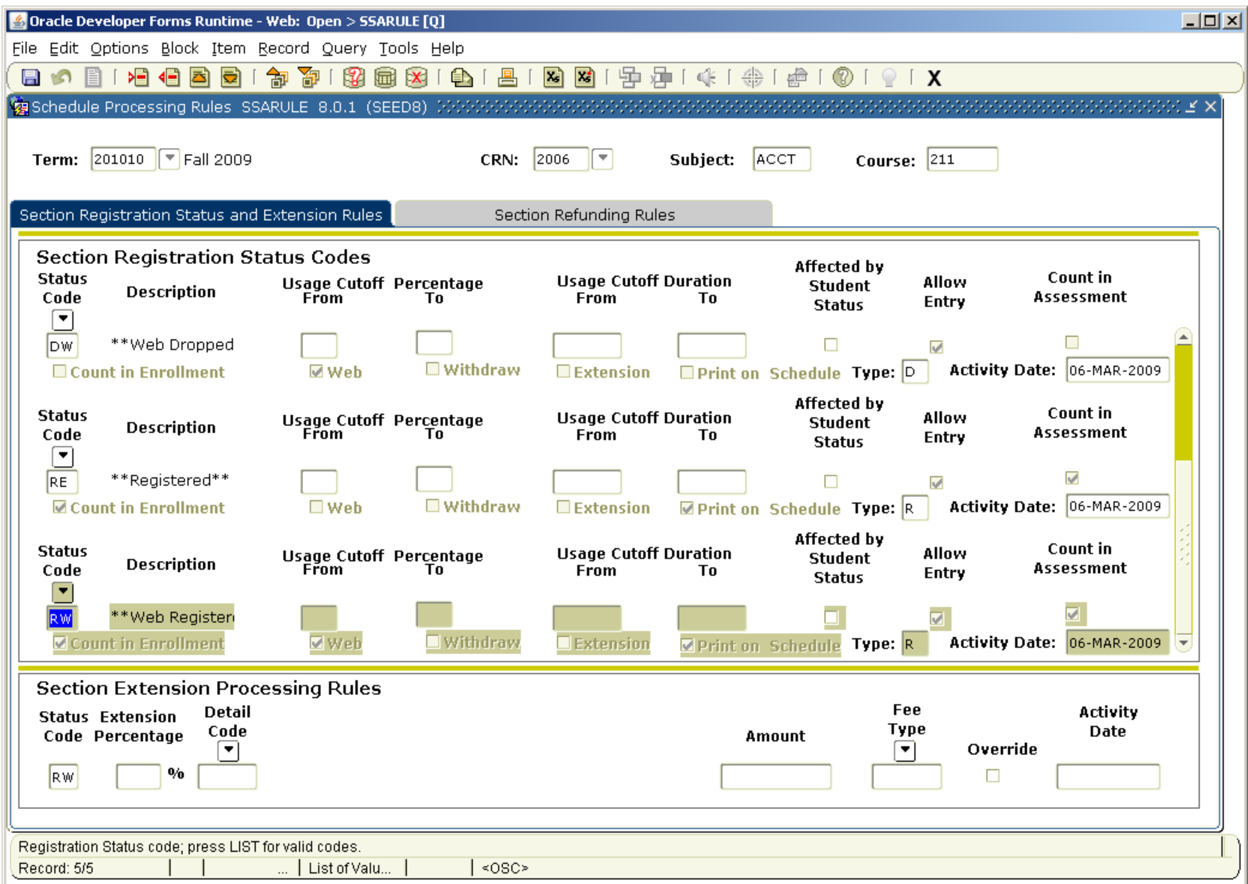
Schedule Processing Rules

Purpose

The Schedule Processing Rules Form (SSARULE) is used to define and maintain rules for registration status codes, refunding, and extension processing at the section level, independent of part-of term or static dates, and can be administered based on an individual learner.

Note: This functionality is used only for Open Learning courses.

Banner form

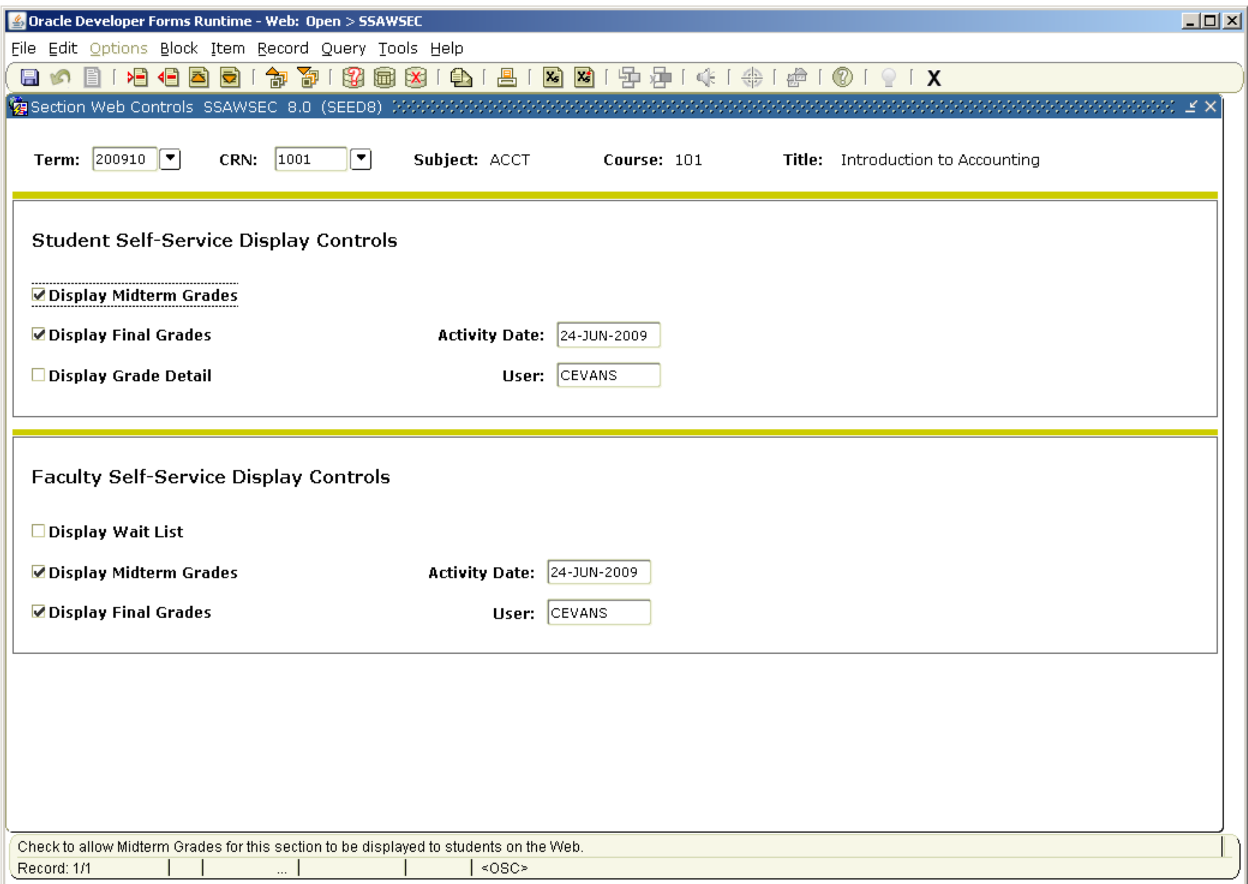


Section Web Control

Purpose

The Section Web Control Form (SSAWSEC) is used to determine the information by term and section that is displayed in Student Self-Service and Faculty and Advisors Self-Service. Entries on this form override the SOATERM controls for the specified CRN.

Banner form

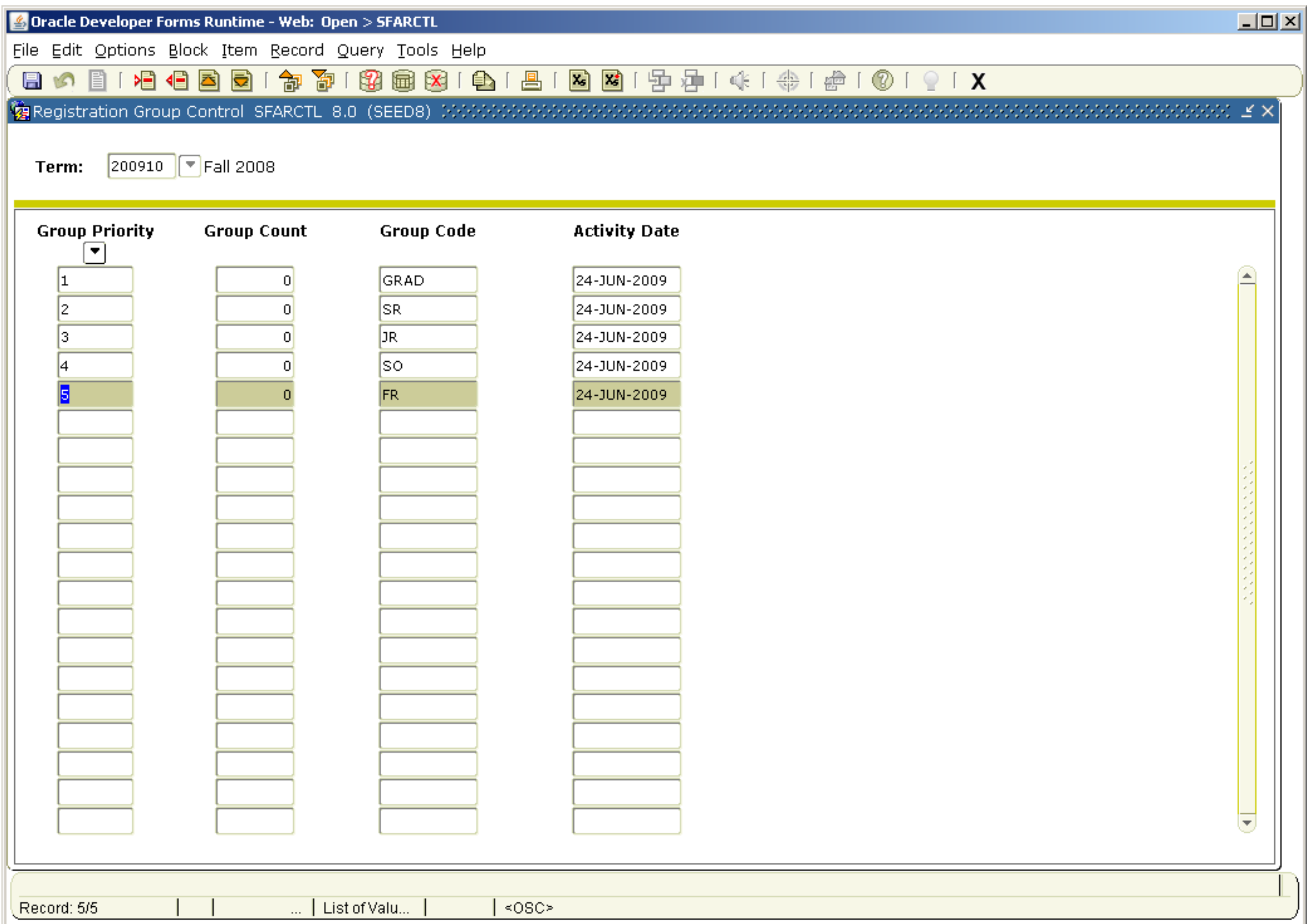


Registration Group Control

Purpose

The Registration Group Control Form (SFARCTL) is used to define registration group codes and the assigned registration priorities for those group codes for Student Self-Service Web registration and Voice Response telephone registration.

Banner form

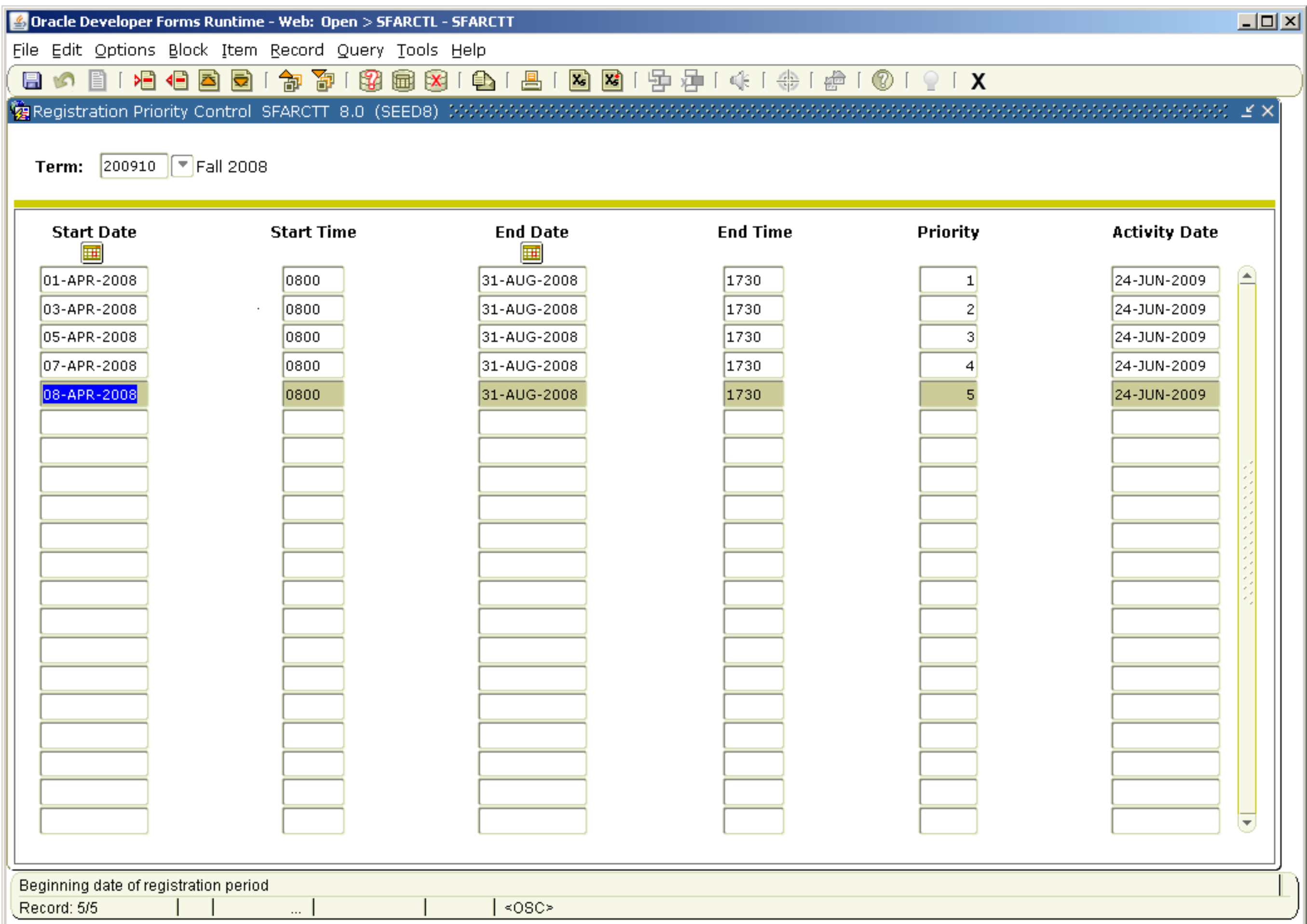


Registration Priority Control

Purpose

The Registration Priority Control Form (SFARCTT) is used to define rules that assign the begin and end dates and times, and priority assignment for each registration time slot for Student Self-Service Web registration and Voice Response telephone registration.

Banner form


Oracle Developer Forms Runtime - Web: Open > SFARCTL - SFARCTT
File Edit Options Block Item Record Query Tools Help
Registration Priority Control SFARCTT 8.0 (SEED8)

Term: 200910 Fall 2008

Start Date	Start Time	End Date	End Time	Priority	Activity Date
01-APR-2008	0800	31-AUG-2008	1730	1	24-JUN-2009
03-APR-2008	0800	31-AUG-2008	1730	2	24-JUN-2009
05-APR-2008	0800	31-AUG-2008	1730	3	24-JUN-2009
07-APR-2008	0800	31-AUG-2008	1730	4	24-JUN-2009
08-APR-2008	0800	31-AUG-2008	1730	5	24-JUN-2009

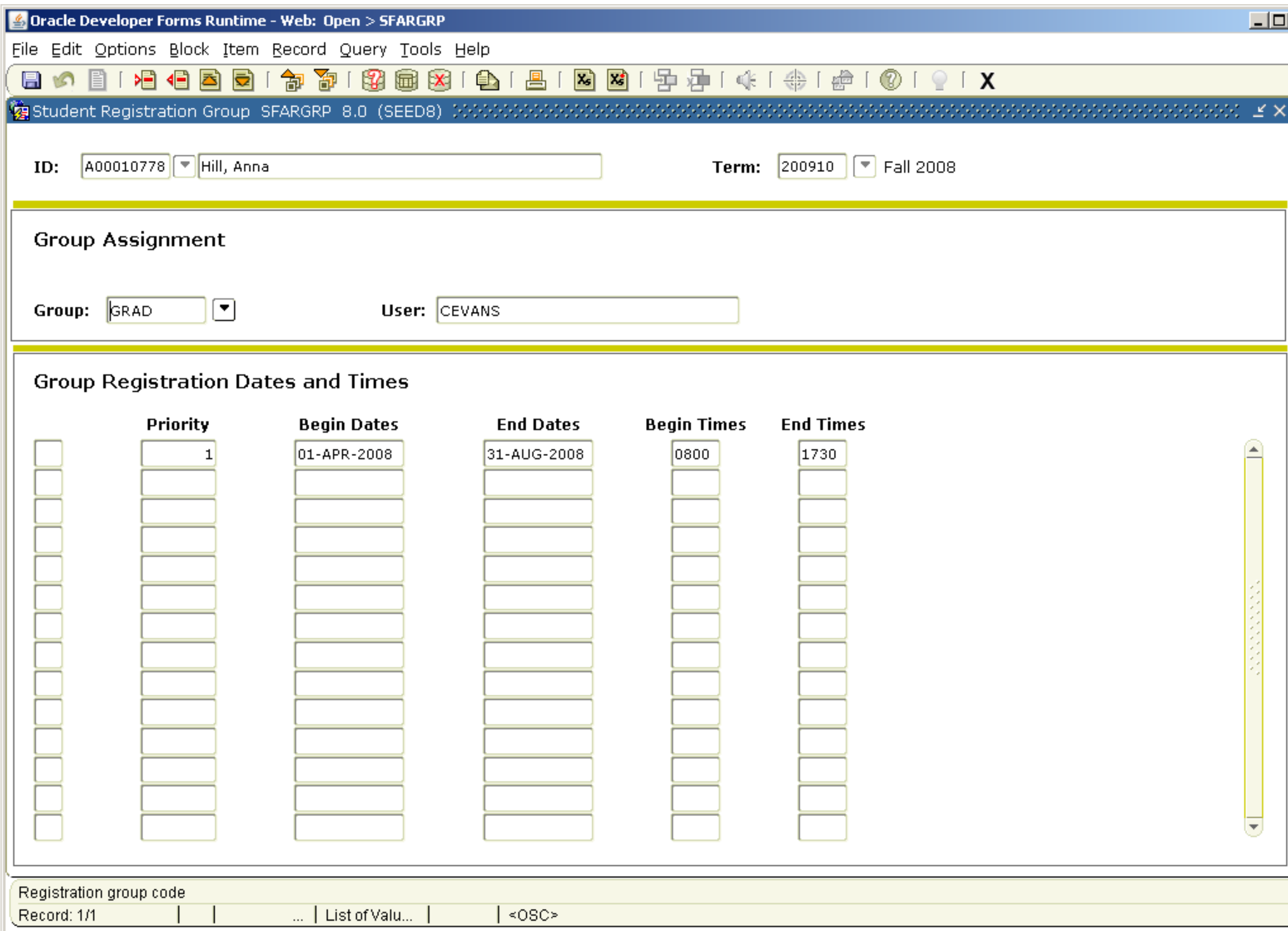
Beginning date of registration period
Record: 5/5 ... <OSC>

Student Registration Group

Purpose

Student Registration Group Form (SFARGRP) is used to assign a registration group to individual students on a term-by-term basis. A registration group that has been defined, but not associated with a priority cannot be assigned to a student on this form. Only one registration group can be assigned to a student for a specific term.

Banner form

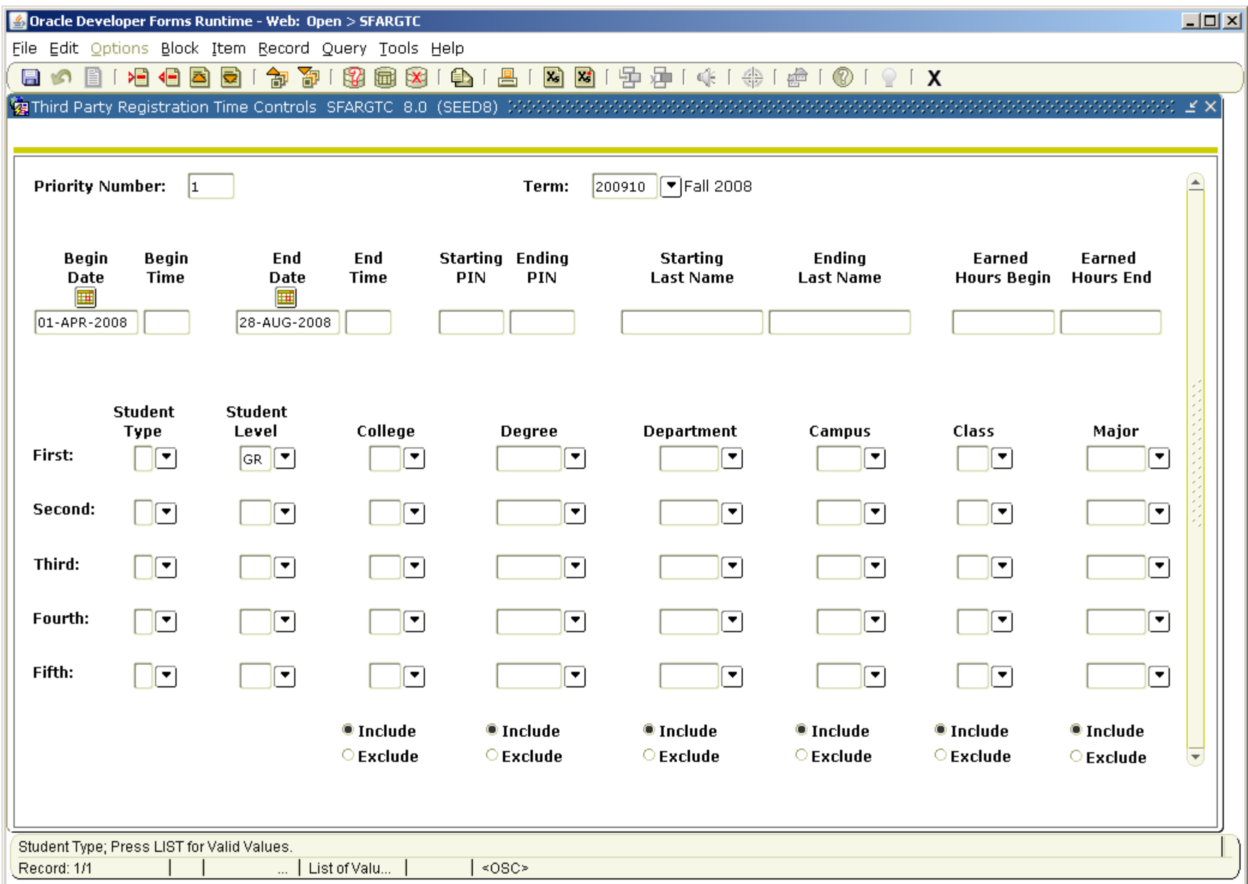


Third Party Registration Time Controls

Purpose

The Third Party Registration Time Controls (SFARGTC) provides an alternative to individually assigned time-ticketing, by offering the ability to create term-specific registration eligibility profiles whereby only those students who match the criteria for a valid time control may register at any given time.

Banner form

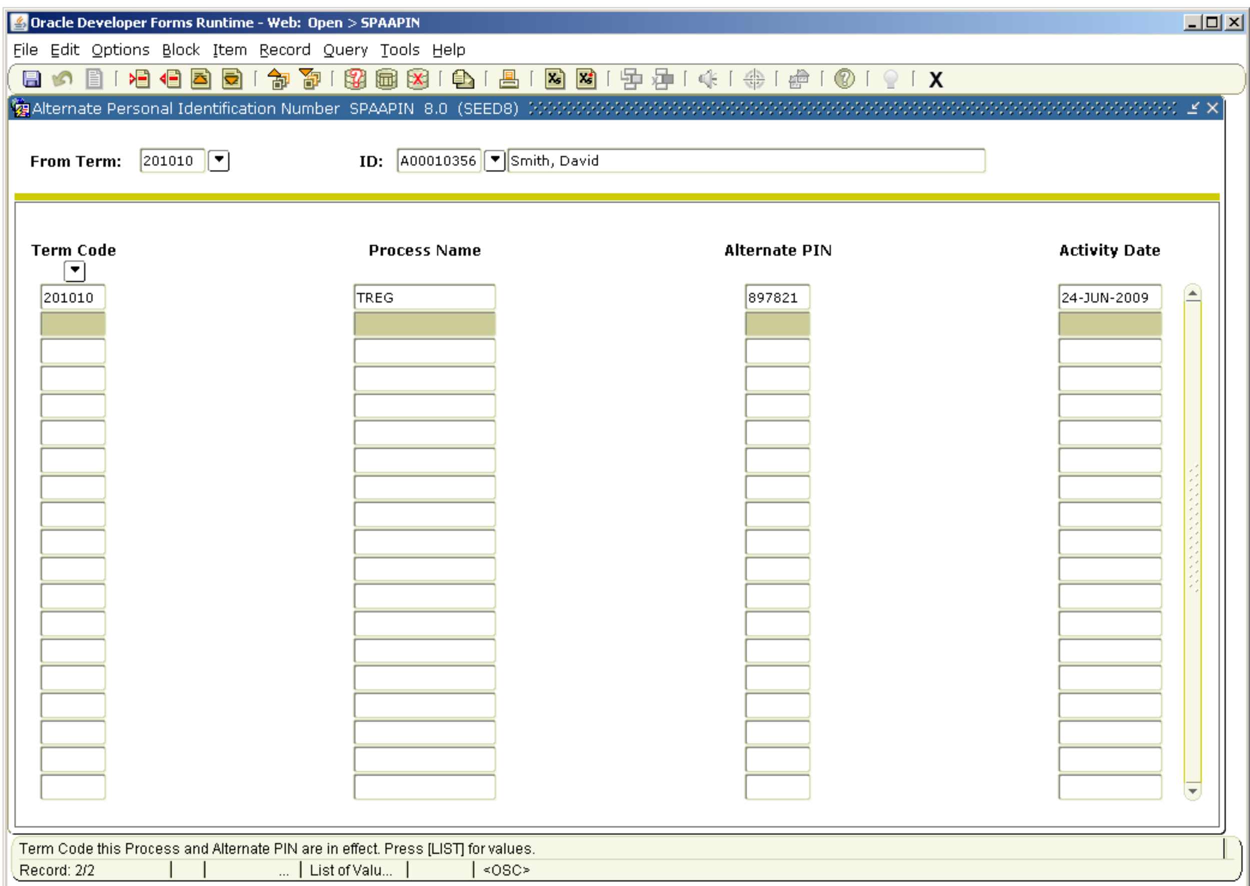


Alternate Personal ID Number

Purpose

The Alternate Personal ID Number Form (SPAAPIN) can be used by end users to create and/or maintain a student's alternate Personal Identification Numbers (PINs). These alternate PINs can be used by Banner processes (e.g., Voice Response) or to fit institution-specific needs. The alternate PIN will only prevent a student from performing registration functions such as adding or deleting courses from their schedule.

Banner form

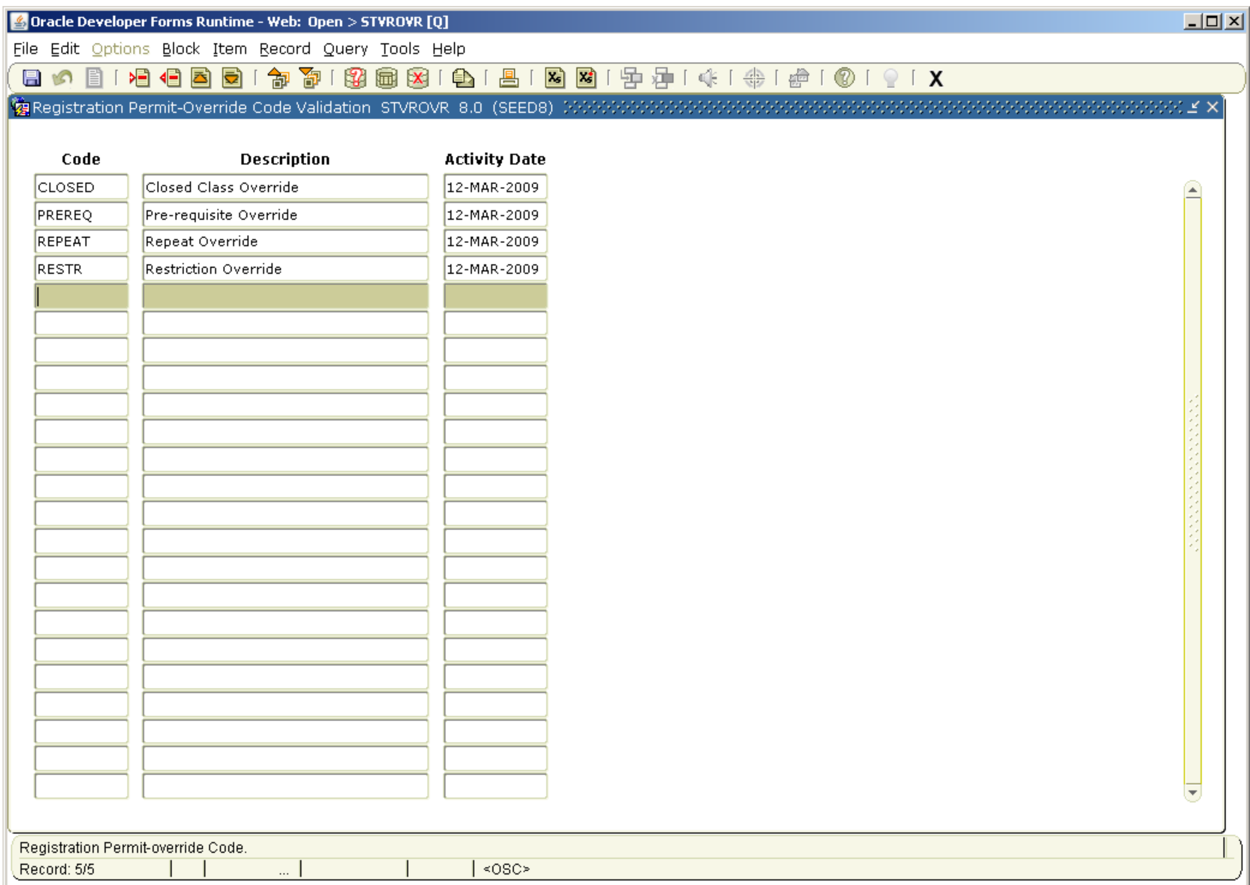


Registration Permit-Override Code Validation

Purpose

The Registration Permit-Override Code Validation Form (STVROVR) is used to define and maintain the codes and descriptions for assigning registration permit-override groups to individual students in the Student Permit-Overrides Form (SFASRPO) for registration processing. The rules for each registration permit-override group are defined on the Registration Permit-Overrides Control Form (SFAROVR) on a term-by-term basis and must exist before they can be assigned to students.

Banner form



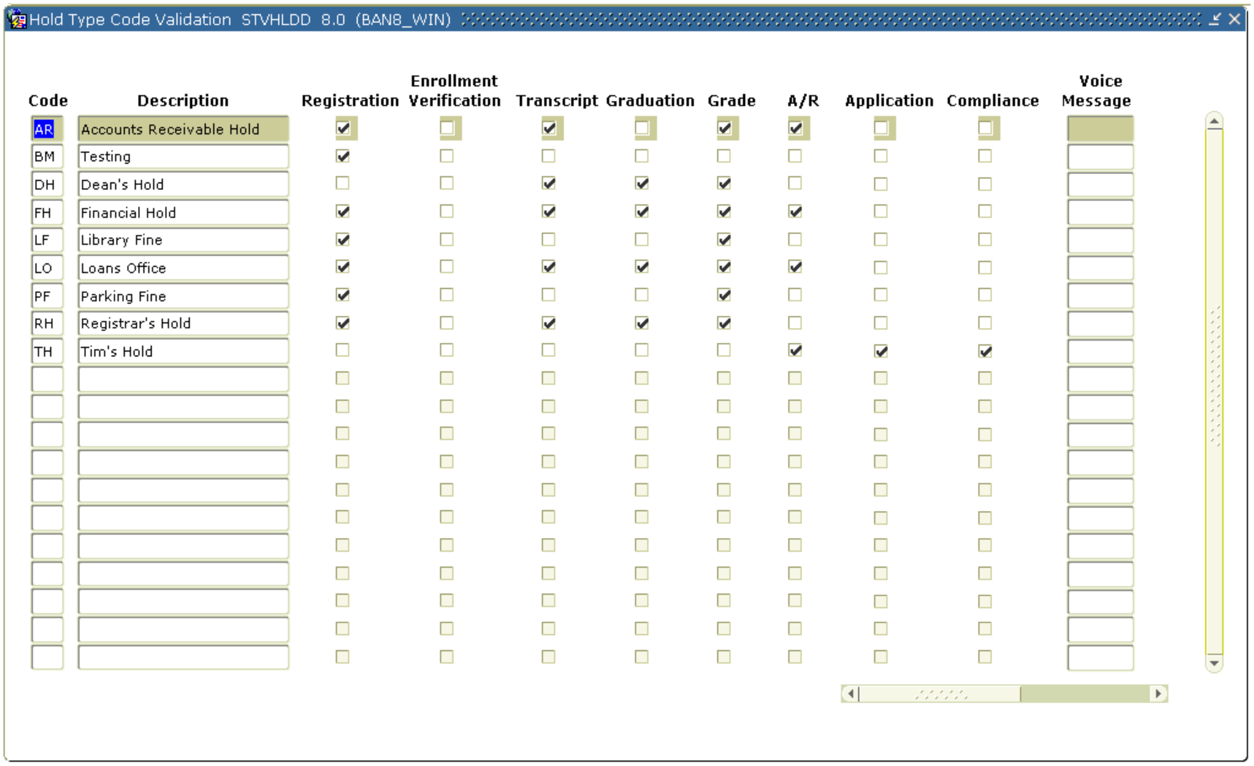
Hold Type Code Validation

Purpose

The Hold Type Code Validation Form (STVHLDD) is used to maintain hold type and hold processing rules. This form is used by other forms to validate hold types. The user may only create or update hold types from this form. The Registration Hold, Enrollment Verification Hold, Transcript Hold, Graduation Hold, Grade Hold and Accounts Receivable Hold fields allow the user to set specific kinds of processing each hold type will control.

Only hold codes with the Web Indicator checked will be displayed in Self Service.

Banner form



Code	Description	Registration	Enrollment Verification	Transcript	Graduation	Grade	A/R	Application	Compliance	Voice Message
AR	Accounts Receivable Hold	✓		✓		✓	✓			
BM	Testing	✓								
DH	Dean's Hold			✓	✓	✓				
FH	Financial Hold	✓		✓	✓	✓	✓			
LF	Library Fine	✓				✓				
LO	Loans Office	✓		✓	✓	✓	✓			
PF	Parking Fine	✓				✓				
RH	Registrar's Hold	✓		✓	✓	✓				
TH	Tim's Hold						✓	✓	✓	

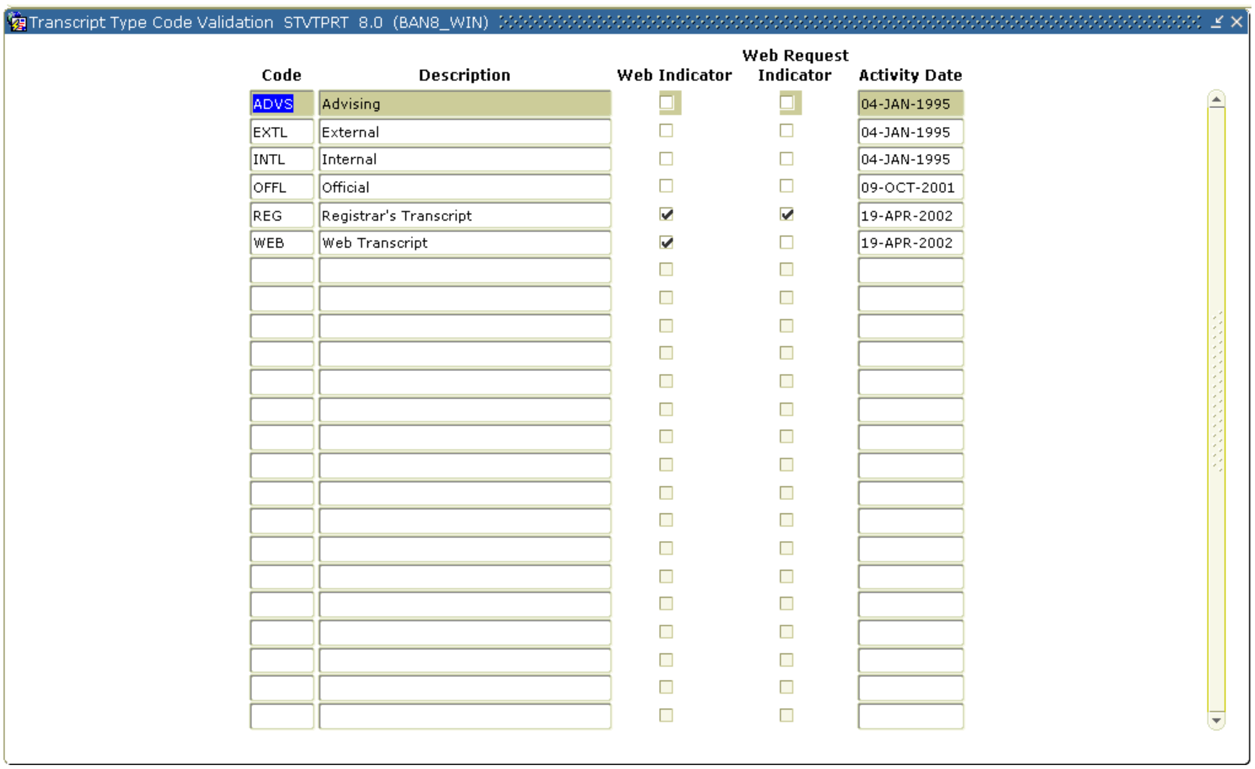
Transcript Type Code Validation

Purpose

The Transcript Type Code Validation Form (STVTPRT) is used to create, update, insert, and delete codes for transcript types (Official, Internal, Advising, etc.). This form is used by other forms to validate transcript type codes.

The Web Indicator check is used to display this transcript type in Self Service. The Web Request indicator is used to activate the types of transcripts a student may request to be produced by the Registrar's Office.

Banner form


Transcript Type Code Validation STVTPRT 8.0 (BAN8_WIN)

Code	Description	Web Indicator	Web Request Indicator	Activity Date
ADVS	Advising	☐	☐	04-JAN-1995
EXTL	External	☐	☐	04-JAN-1995
INTL	Internal	☐	☐	04-JAN-1995
OFFL	Official	☐	☐	09-OCT-2001
REG	Registrar's Transcript	☑	☑	19-APR-2002
WEB	Web Transcript	☑	☐	19-APR-2002

Transcript Type Rules

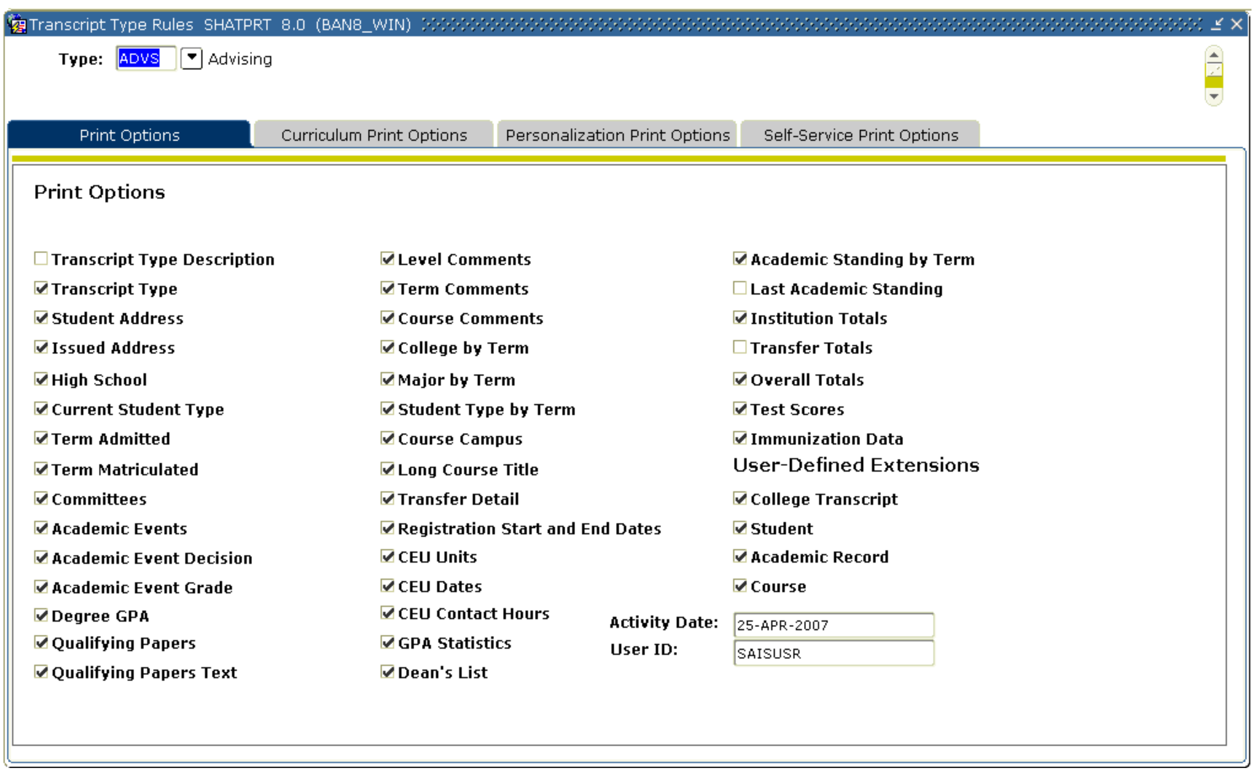
Purpose

The Transcript Type Rules Form (SHATPRT) is used to create the rules associated with the type of transcript being requested. Examples of transcript type include External Official Transcript or Advisor Transcript. The option of printing information on a transcript is indicated by checking the appropriate box. For example, checking the **Dean's List** box indicates that this information is to be printed on the transcript. The printing of all majors for online and Web transcripts is controlled by the **Degree Major** checkbox. The printing of all minors is controlled by the **Degree Minor** checkbox.

The Transcript Type Validation Form (STVTPRT) must be created prior to creating the rules.

The Request Processing Information Window is used to specify the detailed information used for a Web transcript request. Use the Web Transcript Control, Web Self Service, or Web Payment choices in the **Options** Menu to access this window.

Banner form

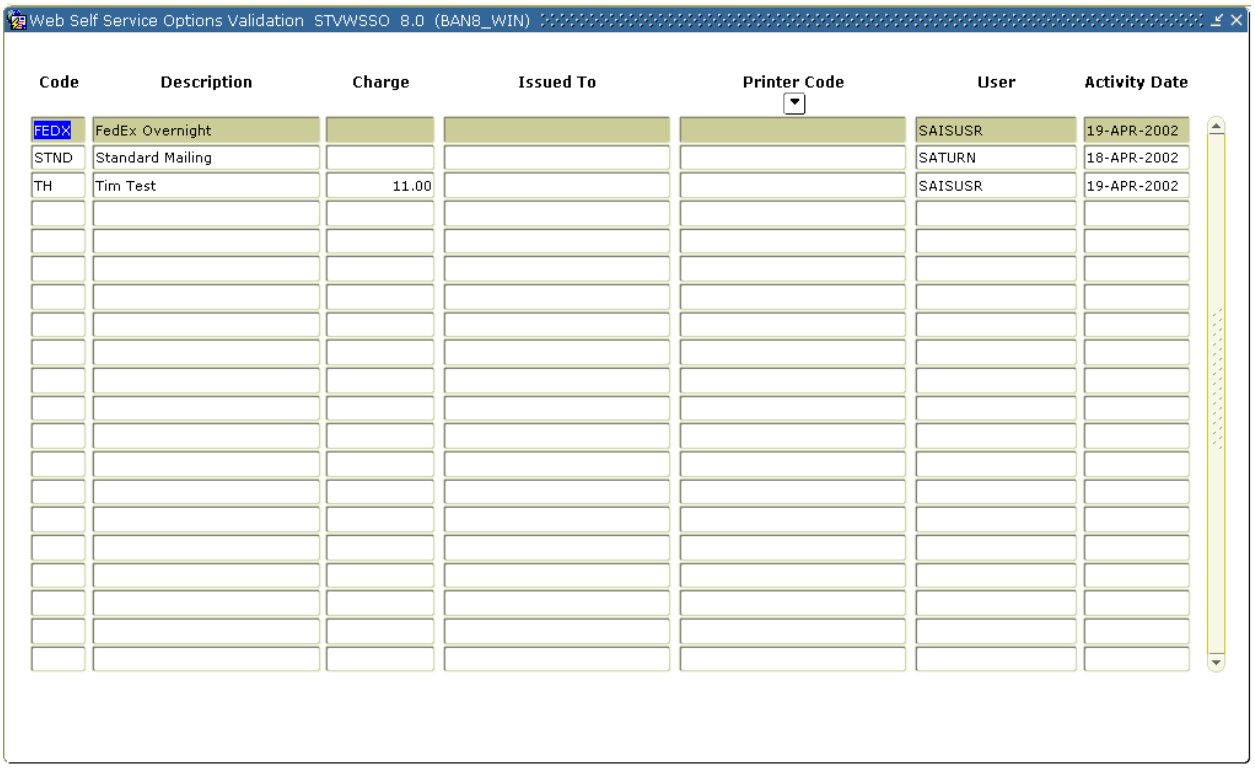


Web Self-Service Options Validation

Purpose

The Web Self-Service Options Validation Form (STVWSSO) is used to create and update the Web Self-Service option codes for use with Web transcript requests.

Banner form



Web Self Service Options Validation STVWSSO 8.0 (BAN8_WIN)

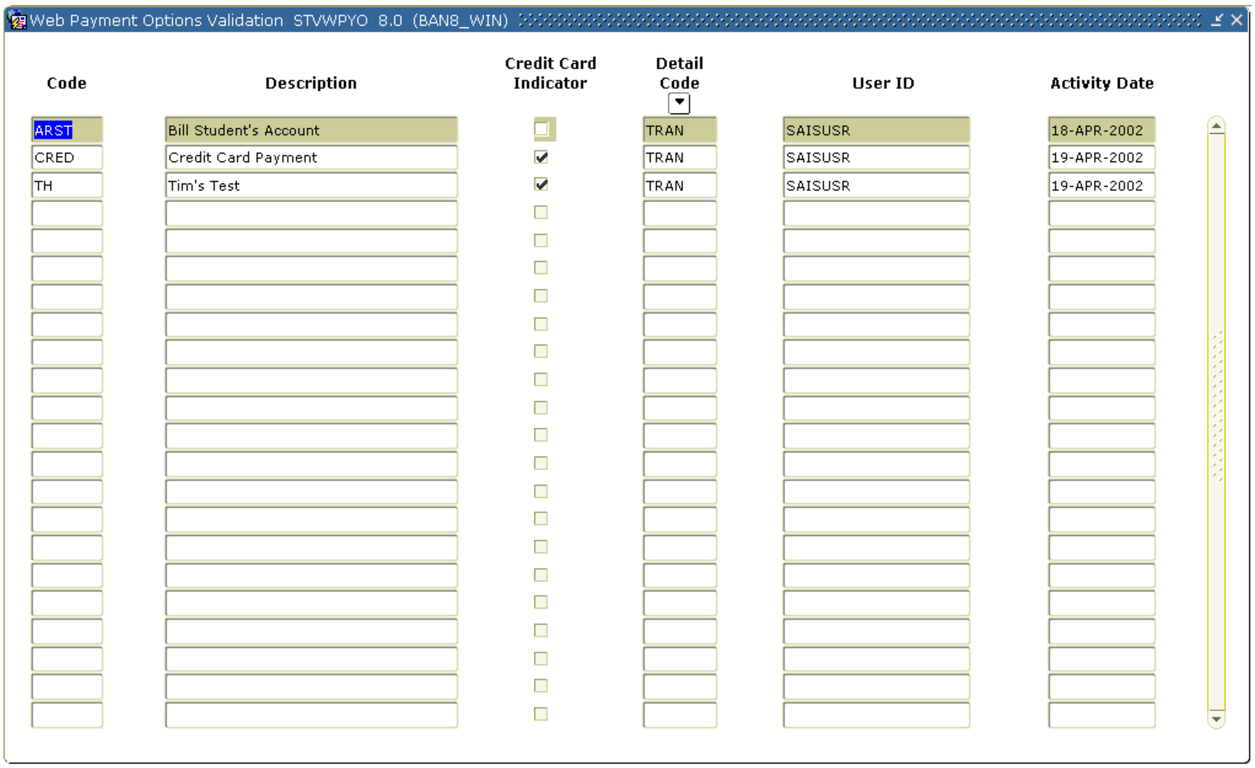
Code	Description	Charge	Issued To	Printer Code	User	Activity Date
FEDX	FedEx Overnight				SAISUSR	19-APR-2002
STND	Standard Mailing				SATURN	18-APR-2002
TH	Tim Test	11.00			SAISUSR	19-APR-2002

Web Payments Option Validation

Purpose

The Web Payment Options Validation Form (STVWPYO) is used to create and update the Web payment option codes for use with Web transcript requests.

Banner form


Web Payment Options Validation STVWPYO 8.0 (BAN8_WIN)

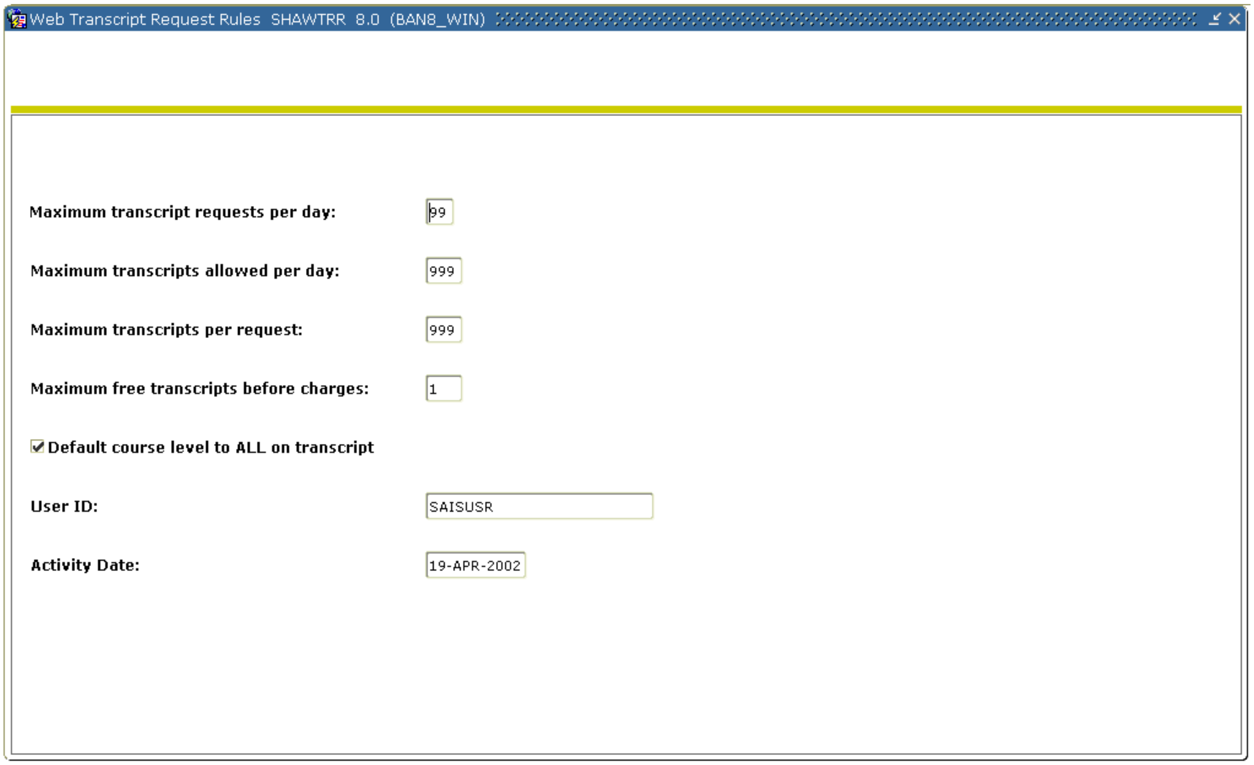
Code	Description	Credit Card Indicator	Detail Code	User ID	Activity Date
ARST	Bill Student's Account	☐	TRAN	SAISUSR	18-APR-2002
CRED	Credit Card Payment	☑	TRAN	SAISUSR	19-APR-2002
TH	Tim's Test	☑	TRAN	SAISUSR	19-APR-2002

Web Transcript Request Rules

Purpose

The Web Transcript Request Rules Form (SHAWTRR) is used to set up the processing rules that will be in effect for all Web transcript requests.

Banner form

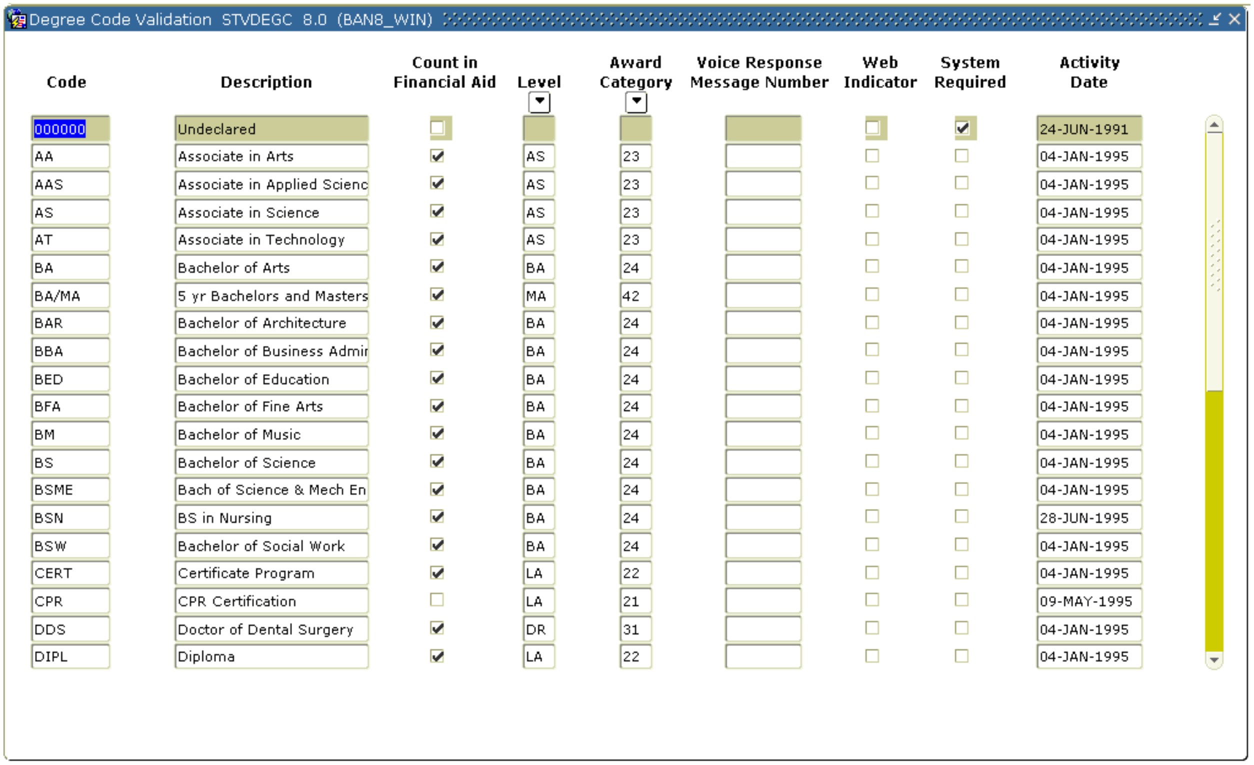


Degree Code Validation

Purpose

The Degree Code Validation Form (STVDEGC) is used to maintain the degree codes (*Undeclared*, *Bachelor of Arts*, *Doctor of Education*, etc.). This form is used by other forms to validate the degree codes.

Banner form


Degree Code Validation STVDEGC 8.0 (BAN8_WIN)

Code	Description	Count in Financial Aid	Level	Award Category	Voice Response Message Number	Web Indicator	System Required	Activity Date
000000	Undeclared						✓	24-JUN-1991
AA	Associate in Arts	✓	AS	23				04-JAN-1995
AAS	Associate in Applied Scienc	✓	AS	23				04-JAN-1995
AS	Associate in Science	✓	AS	23				04-JAN-1995
AT	Associate in Technology	✓	AS	23				04-JAN-1995
BA	Bachelor of Arts	✓	BA	24				04-JAN-1995
BA/MA	5 yr Bachelors and Masters	✓	MA	42				04-JAN-1995
BAR	Bachelor of Architecture	✓	BA	24				04-JAN-1995
BBA	Bachelor of Business Admir	✓	BA	24				04-JAN-1995
BED	Bachelor of Education	✓	BA	24				04-JAN-1995
BFA	Bachelor of Fine Arts	✓	BA	24				04-JAN-1995
BM	Bachelor of Music	✓	BA	24				04-JAN-1995
BS	Bachelor of Science	✓	BA	24				04-JAN-1995
BSME	Bach of Science & Mech En	✓	BA	24				04-JAN-1995
BSN	BS in Nursing	✓	BA	24				28-JUN-1995
BSW	Bachelor of Social Work	✓	BA	24				04-JAN-1995
CERT	Certificate Program	✓	LA	22				04-JAN-1995
CPR	CPR Certification		LA	21				09-MAY-1995
DDS	Doctor of Dental Surgery	✓	DR	31				04-JAN-1995
DIPL	Diploma	✓	LA	22				04-JAN-1995

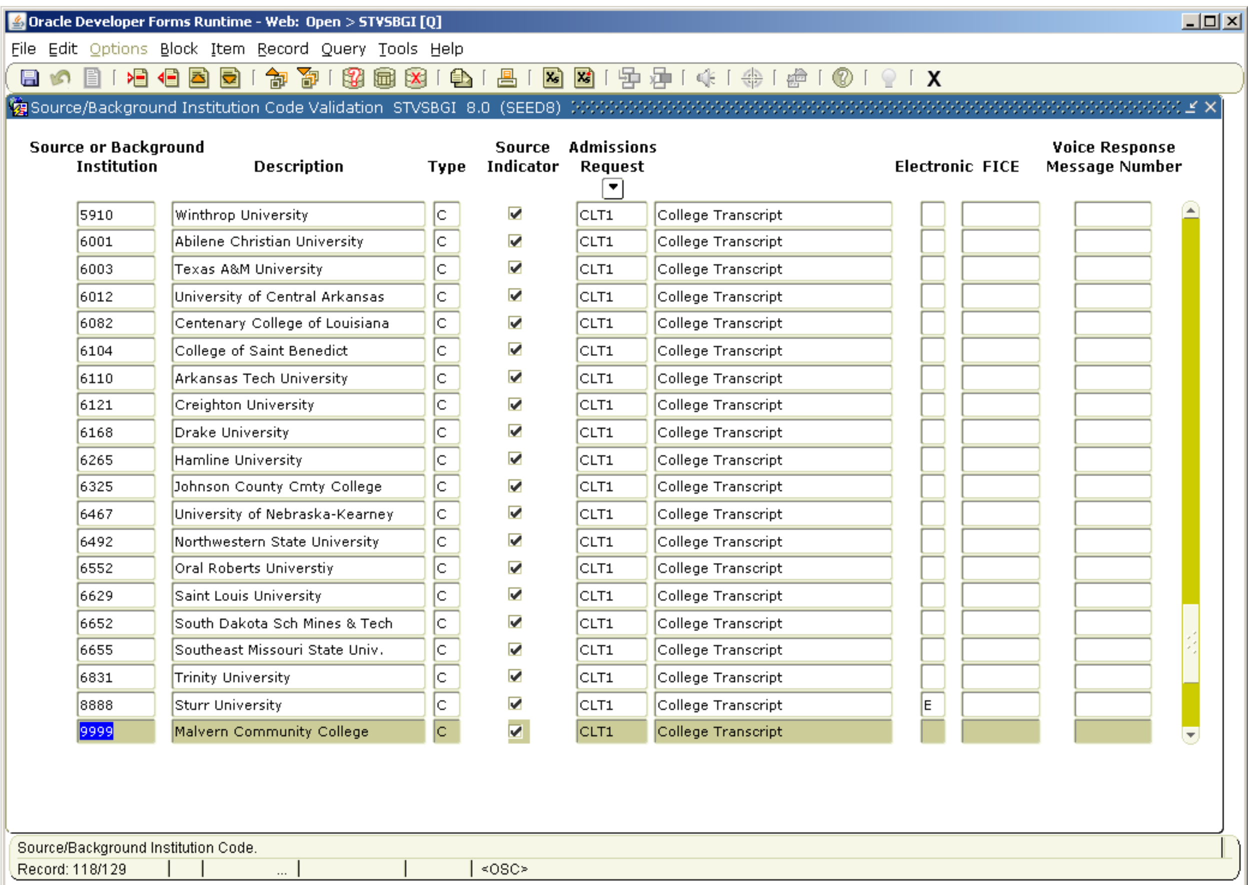
Source/Background Institution Code Validation

Purpose

The Source/Background Institution Code Validation Form (STVSBGI) is used to create, update, insert, and delete source/background institution codes.

The **Electronic** field indicates whether an institution is capable of receiving transcript information electronically, i.e. XML or EDI format.

Banner form


Oracle Developer Forms Runtime - Web: Open > STVSBGI [Q]

File Edit Options Block Item Record Query Tools Help

Source/Background Institution Code Validation STVSBGI 8.0 (SEED8)

Source or Background Institution	Description	Type	Source Indicator	Admissions Request		Electronic	FICE	Voice Response Message Number
5910	Winthrop University	C	✔	CLT1	College Transcript			
6001	Abilene Christian University	C	✔	CLT1	College Transcript			
6003	Texas A&M University	C	✔	CLT1	College Transcript			
6012	University of Central Arkansas	C	✔	CLT1	College Transcript			
6082	Centenary College of Louisiana	C	✔	CLT1	College Transcript			
6104	College of Saint Benedict	C	✔	CLT1	College Transcript			
6110	Arkansas Tech University	C	✔	CLT1	College Transcript			
6121	Creighton University	C	✔	CLT1	College Transcript			
6168	Drake University	C	✔	CLT1	College Transcript			
6265	Hamline University	C	✔	CLT1	College Transcript			
6325	Johnson County Cmty College	C	✔	CLT1	College Transcript			
6467	University of Nebraska-Kearney	C	✔	CLT1	College Transcript			
6492	Northwestern State University	C	✔	CLT1	College Transcript			
6552	Oral Roberts Universtiy	C	✔	CLT1	College Transcript			
6629	Saint Louis University	C	✔	CLT1	College Transcript			
6652	South Dakota Sch Mines & Tech	C	✔	CLT1	College Transcript			
6655	Southeast Missouri State Univ.	C	✔	CLT1	College Transcript			
6831	Trinity University	C	✔	CLT1	College Transcript			
8888	Sturr University	C	✔	CLT1	College Transcript	E		
9999	Malvern Community College	C	✔	CLT1	College Transcript			

Source/Background Institution Code.

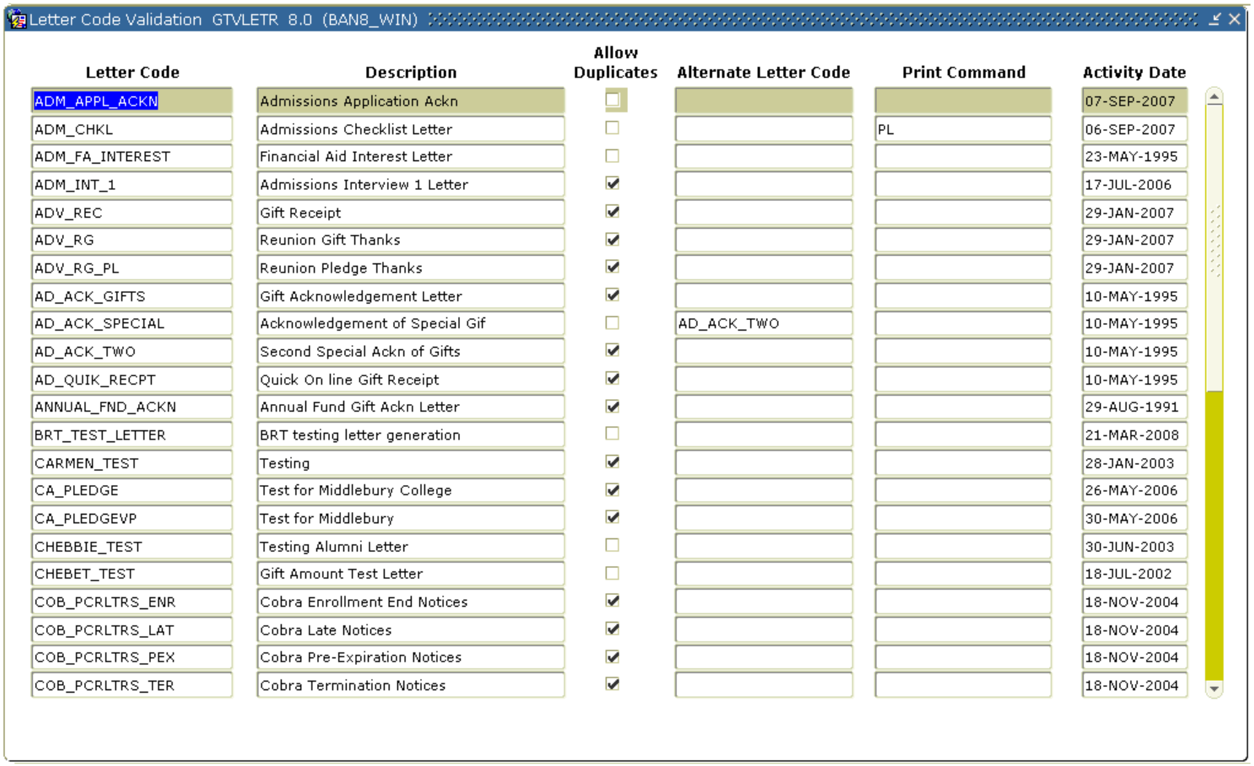
Record: 118/129 ... <OSC>

Letter Code Validation

Purpose

The Letter Code Validation Form (GTVLETR) is used to identify the names of the letters being used.

Banner form


Letter Code Validation GTVLETR 8.0 (BAN8_WIN)

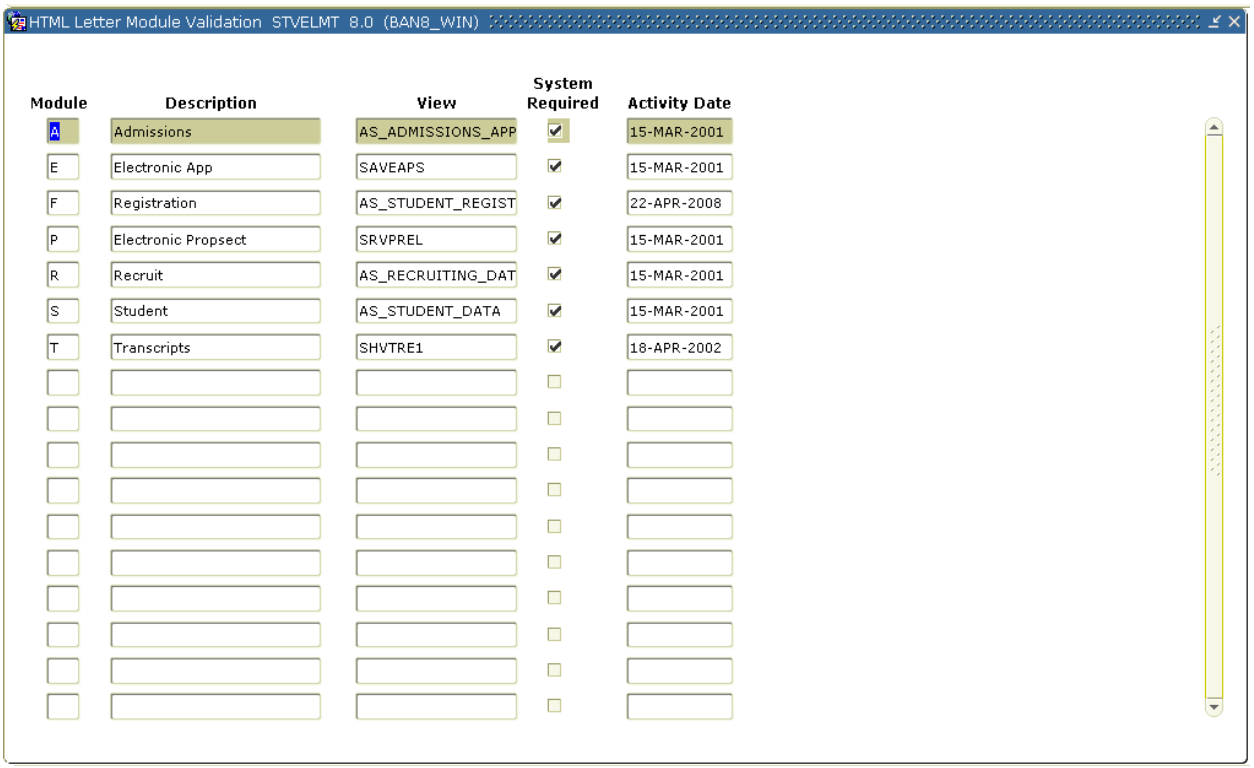
Letter Code	Description	Allow Duplicates	Alternate Letter Code	Print Command	Activity Date
ADM_APPL_ACKN	Admissions Application Ackn	☐			07-SEP-2007
ADM_CHKL	Admissions Checklist Letter	☐		PL	06-SEP-2007
ADM_FA_INTEREST	Financial Aid Interest Letter	☐			23-MAY-1995
ADM_INT_1	Admissions Interview 1 Letter	☑			17-JUL-2006
ADV_REC	Gift Receipt	☑			29-JAN-2007
ADV_RG	Reunion Gift Thanks	☑			29-JAN-2007
ADV_RG_PL	Reunion Pledge Thanks	☑			29-JAN-2007
AD_ACK_GIFTS	Gift Acknowledgement Letter	☑			10-MAY-1995
AD_ACK_SPECIAL	Acknowledgement of Special Gif	☐	AD_ACK_TWO		10-MAY-1995
AD_ACK_TWO	Second Special Ackn of Gifts	☑			10-MAY-1995
AD_QUIK_RECPT	Quick On line Gift Receipt	☑			10-MAY-1995
ANNUAL_FND_ACKN	Annual Fund Gift Ackn Letter	☑			29-AUG-1991
BRT_TEST_LETTER	BRT testing letter generation	☐			21-MAR-2008
CARMEN_TEST	Testing	☑			28-JAN-2003
CA_PLEDGE	Test for Middlebury College	☑			26-MAY-2006
CA_PLEDGEVP	Test for Middlebury	☑			30-MAY-2006
CHEBBIE_TEST	Testing Alumni Letter	☐			30-JUN-2003
CHEBET_TEST	Gift Amount Test Letter	☐			18-JUL-2002
COB_PCRLTRS_ENR	Cobra Enrollment End Notices	☑			18-NOV-2004
COB_PCRLTRS_LAT	Cobra Late Notices	☑			18-NOV-2004
COB_PCRLTRS_PEX	Cobra Pre-Expiration Notices	☑			18-NOV-2004
COB_PCRLTRS_TER	Cobra Termination Notices	☑			18-NOV-2004

HTML Letter Module Validation

Purpose

The HTML Letter Module Validation Form (STVELMT) is used to record the modules and views used in the generation of email letters. This determines the data columns that can be placed on the dynamic HTML letter. Default values are delivered which can be modified if you want a different view for the variables.

Banner form



HTML Letter Module Validation STVELMT 8.0 (BAN8_WIN)

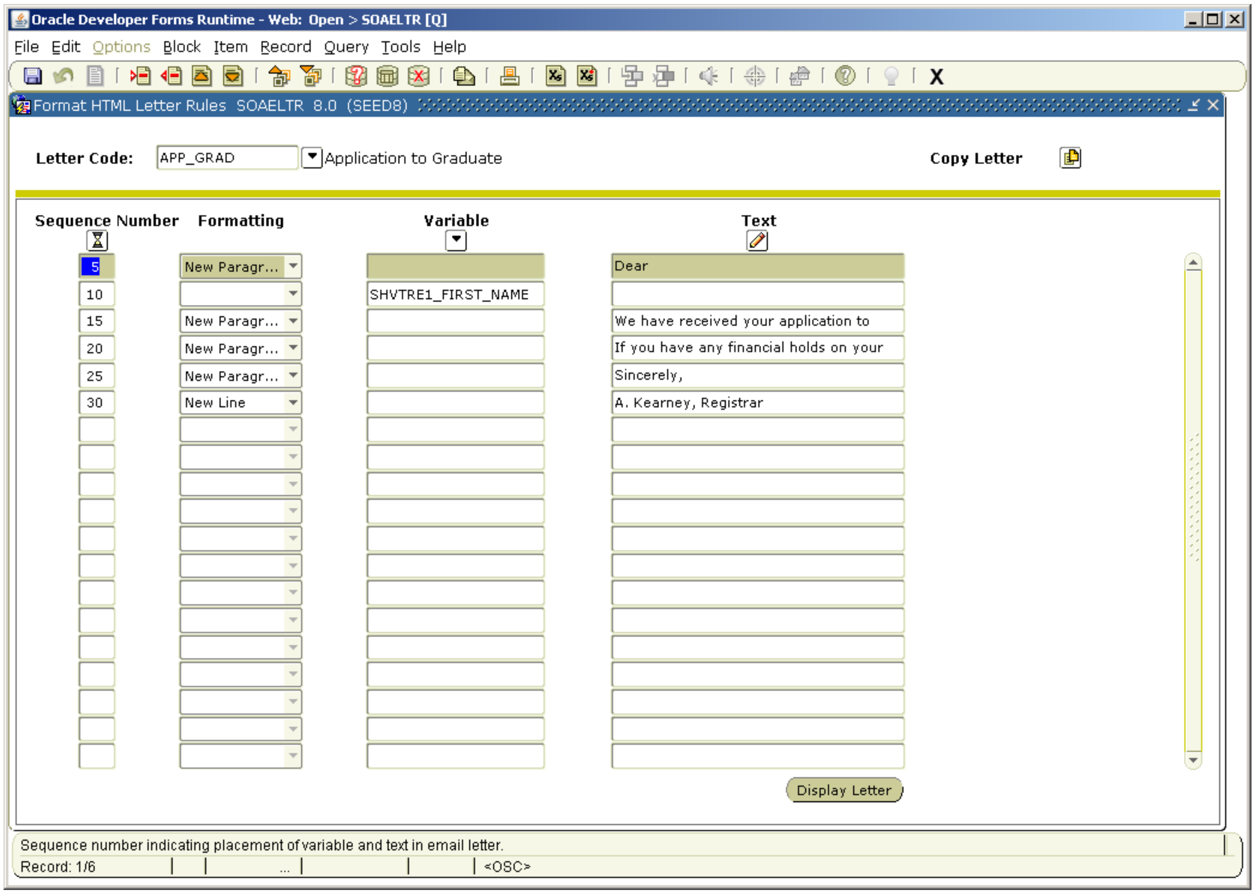
Module	Description	View	System Required	Activity Date
A	Admissions	AS_ADMISSIONS_APP	☑	15-MAR-2001
E	Electronic App	SAVEAPS	☑	15-MAR-2001
F	Registration	AS_STUDENT_REGIST	☑	22-APR-2008
P	Electronic Propsect	SRVPREL	☑	15-MAR-2001
R	Recruit	AS_RECRUITING_DAT	☑	15-MAR-2001
S	Student	AS_STUDENT_DATA	☑	15-MAR-2001
T	Transcripts	SHVTRE1	☑	18-APR-2002

Format HTML Letter Rules

Purpose

The Format HTML Letter Rules Form (SOAELTR) is used to construct letters using HTML formatting commands.

Banner form



E-mail Address Type Validation

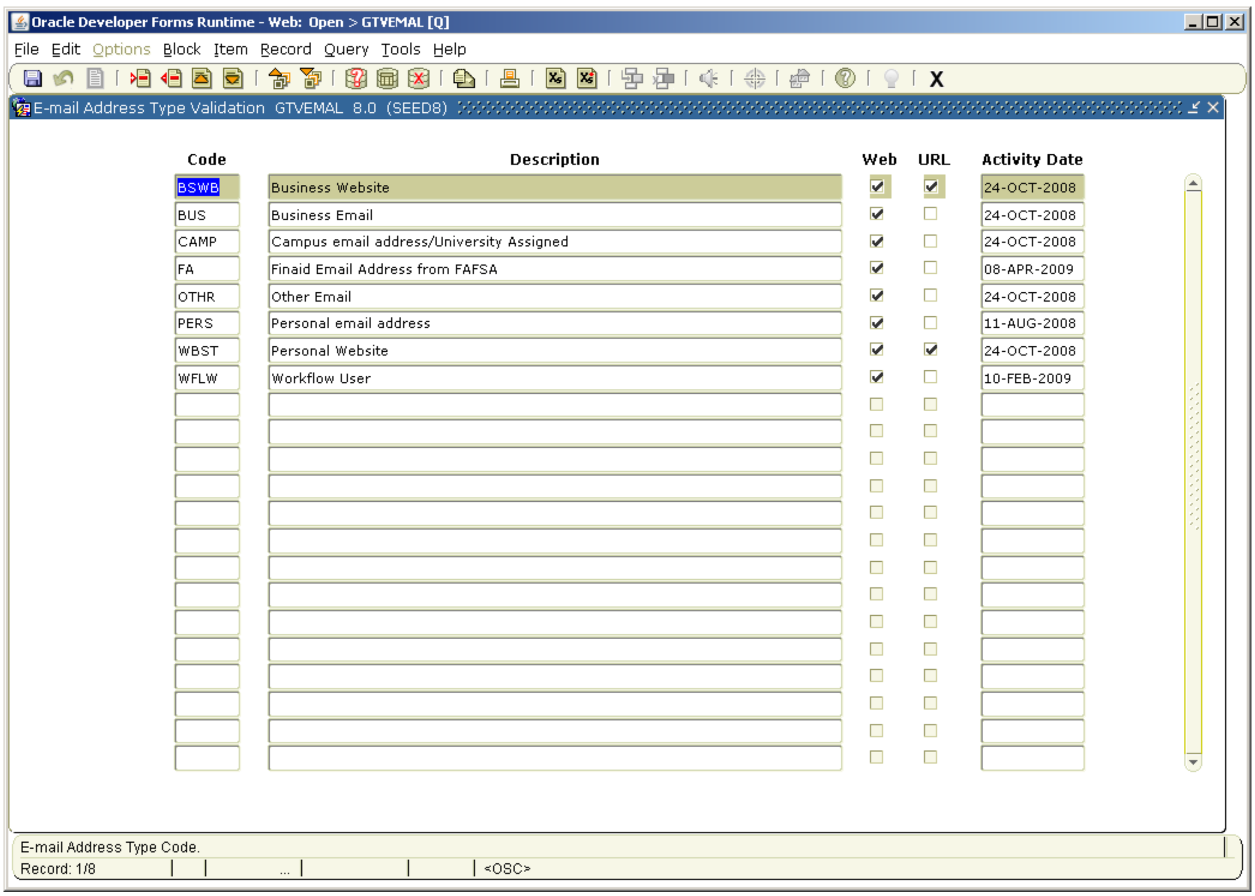
Purpose

The E-mail Address Type Validation Form (GTVEMAL) is used to define valid e-mail address type codes. These codes are used on the E-mail Address Form (GOAEMAL) to enter e-mail address information for individuals.

Examples: *Business*, *personal*, and *school*

If the Web indicator is checked for an email code, that email type is updateable in Banner Self Service.

Banner form


Oracle Developer Forms Runtime - Web: Open > GTVEMAL [Q]

File Edit Options Block Item Record Query Tools Help

E-mail Address Type Validation GTVEMAL 8.0 (SEED8)

Code	Description	Web	URL	Activity Date
BSWB	Business Website	☑	☑	24-OCT-2008
BUS	Business Email	☑	☐	24-OCT-2008
CAMP	Campus email address/University Assigned	☑	☐	24-OCT-2008
FA	Finaid Email Address from FAFSA	☑	☐	08-APR-2009
OTHR	Other Email	☑	☐	24-OCT-2008
PERS	Personal email address	☑	☐	11-AUG-2008
WBST	Personal Website	☑	☑	24-OCT-2008
WFLW	Workflow User	☑	☐	10-FEB-2009

E-mail Address Type Code.

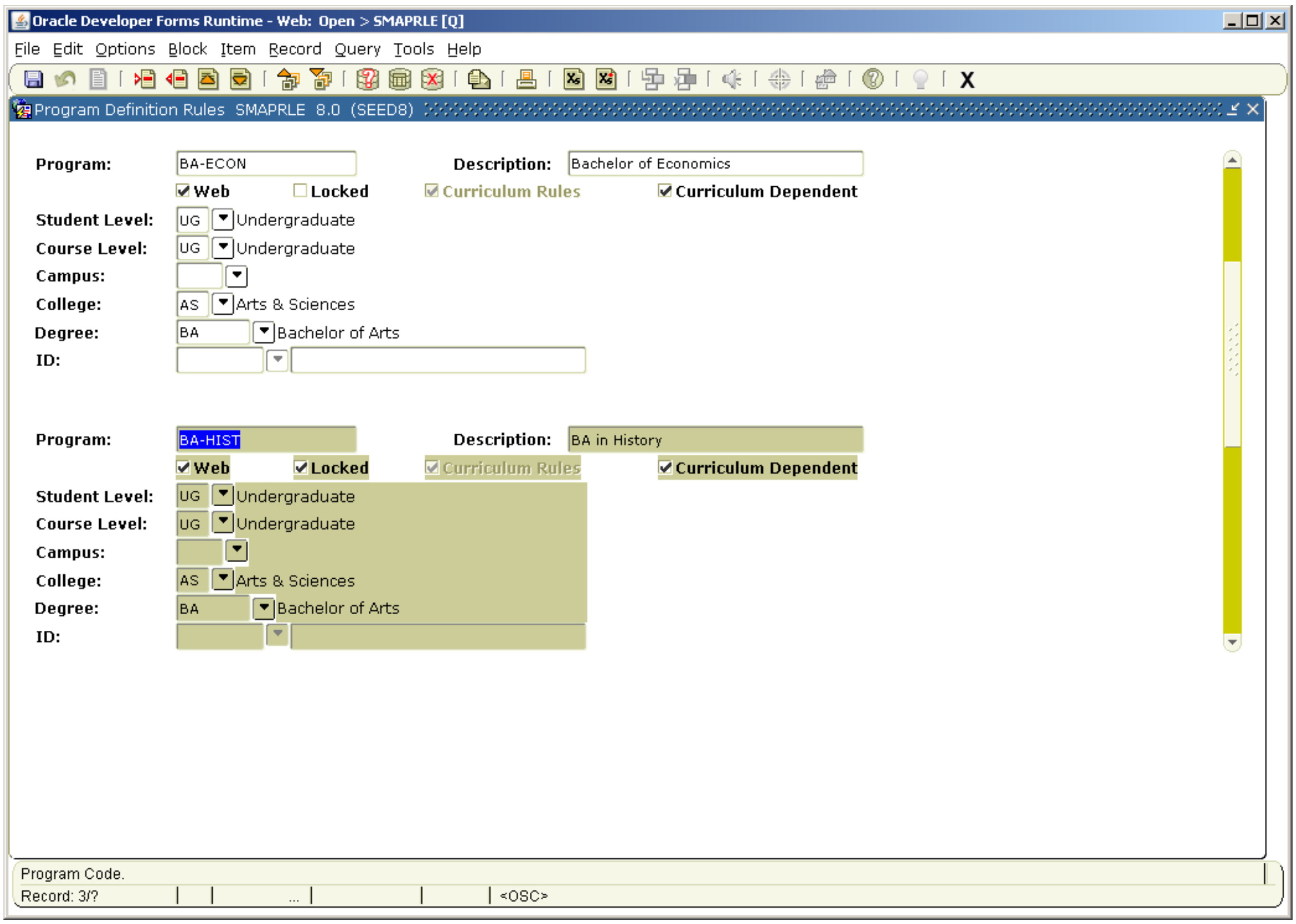
Record: 1/8 | ... | <OSC>

Program Definition Rules

Purpose

The Program Definition Rules Form (SMAPRLE) is used to define program rules. The **Web Indicator** checkbox controls whether the program in the rule should be available when a new compliance evaluation is requested. When the checkbox is selected, the program is displayed. This allows the student or faculty member to create new requests for this program. When the box is cleared, the student or faculty member will not be able to create a compliance request for this program.

Banner form

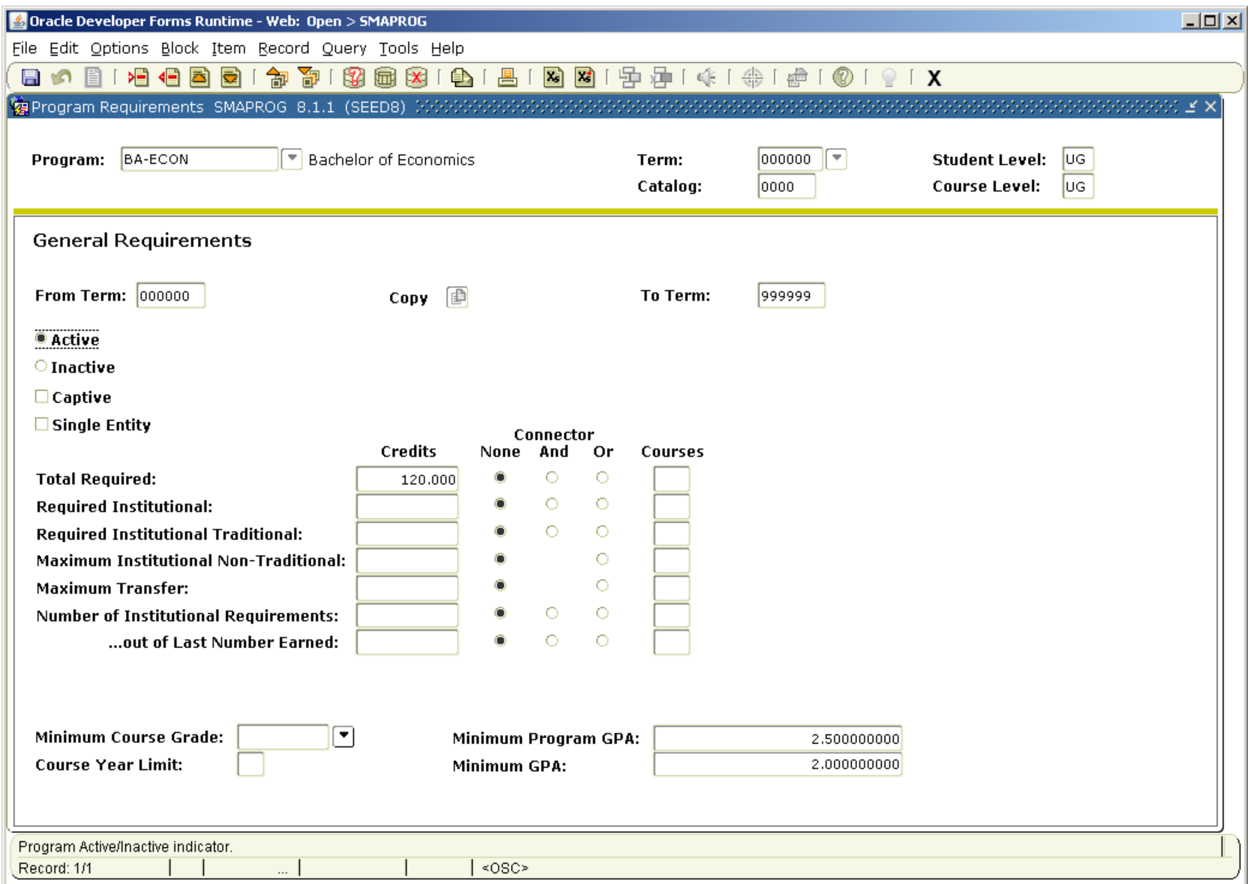


Program Requirements

Purpose

The Program Requirements Form (SMAPROG) is used to define requirements at the program level. You must designate a program as active so that it can be used for compliance. When a program is inactive, it cannot be used for compliance. If you attempt to perform compliance for an inactive program, you will receive an error message.

Banner form

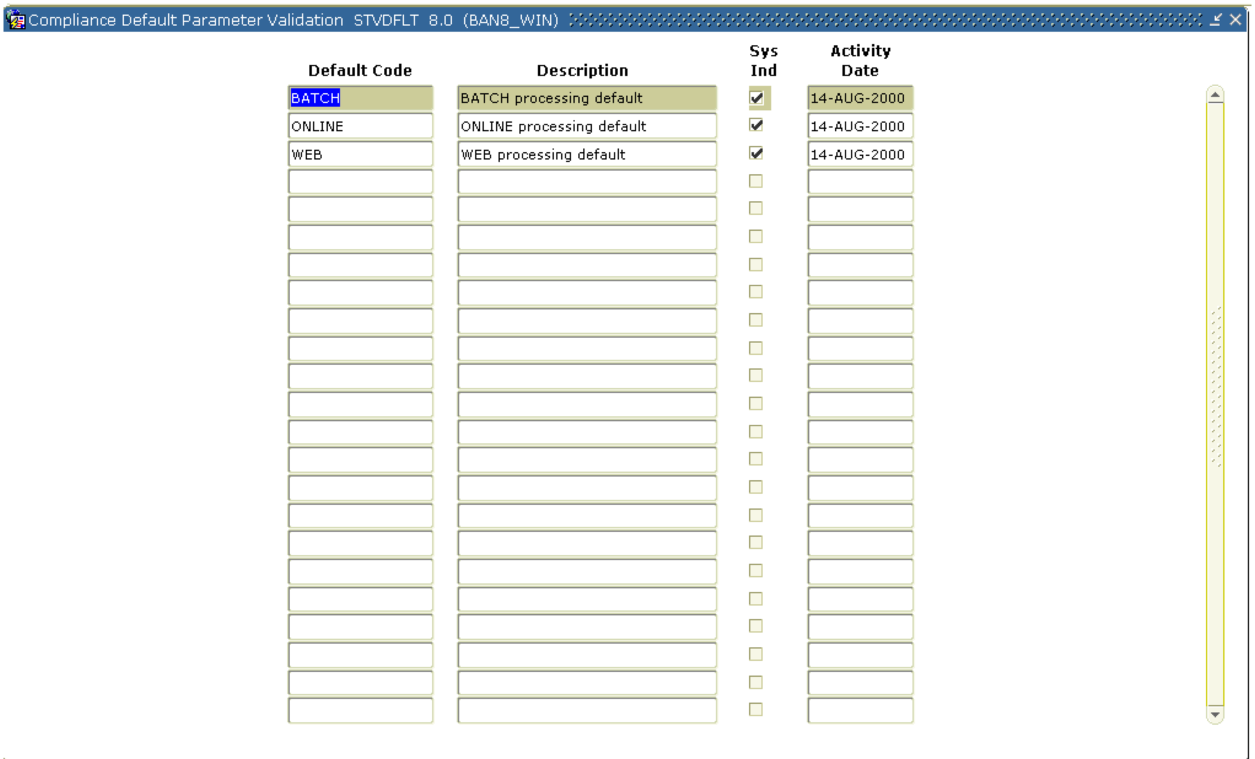


Compliance Default Codes Validation

Purpose

The Compliance Default Codes Validation Form (STVDFLT) is used to define compliance types to be used as optional default values for use in running batch compliance.

Banner form

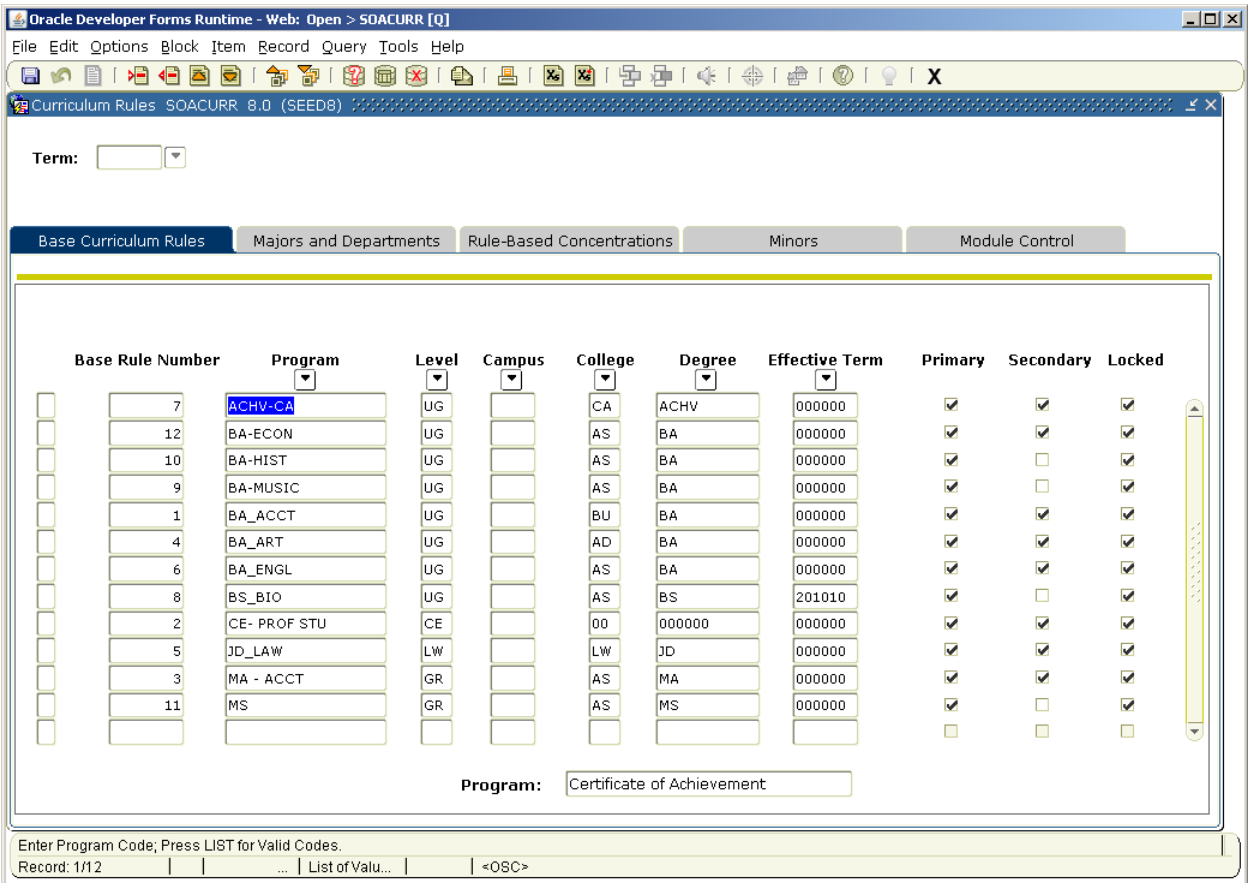


Curriculum Rules

Purpose

The Curriculum Rules Form (SOACURR) is used to establish curriculum rules.

Banner form


Oracle Developer Forms Runtime - Web: Open > SOACURR [Q]

File Edit Options Block Item Record Query Tools Help

Curriculum Rules SOACURR 8.0 (SEED8)

Term:

Base Curriculum Rules | Majors and Departments | Rule-Based Concentrations | Minors | Module Control

Base Rule Number	Program	Level	Campus	College	Degree	Effective Term	Primary	Secondary	Locked
7	ACHV-CA	UG		CA	ACHV	000000	✓	✓	✓
12	BA-ECON	UG		AS	BA	000000	✓	✓	✓
10	BA-HIST	UG		AS	BA	000000	✓		✓
9	BA-MUSIC	UG		AS	BA	000000	✓		✓
1	BA_ACCT	UG		BU	BA	000000	✓	✓	✓
4	BA_ART	UG		AD	BA	000000	✓	✓	✓
6	BA_ENGL	UG		AS	BA	000000	✓	✓	✓
8	BS_BIO	UG		AS	BS	201010	✓		✓
2	CE- PROF STU	CE		00	000000	000000	✓	✓	✓
5	JD_LAW	LW		LW	JD	000000	✓	✓	✓
3	MA - ACCT	GR		AS	MA	000000	✓	✓	✓
11	MS	GR		AS	MS	000000	✓		✓

Program: Certificate of Achievement

Enter Program Code; Press LIST for Valid Codes.

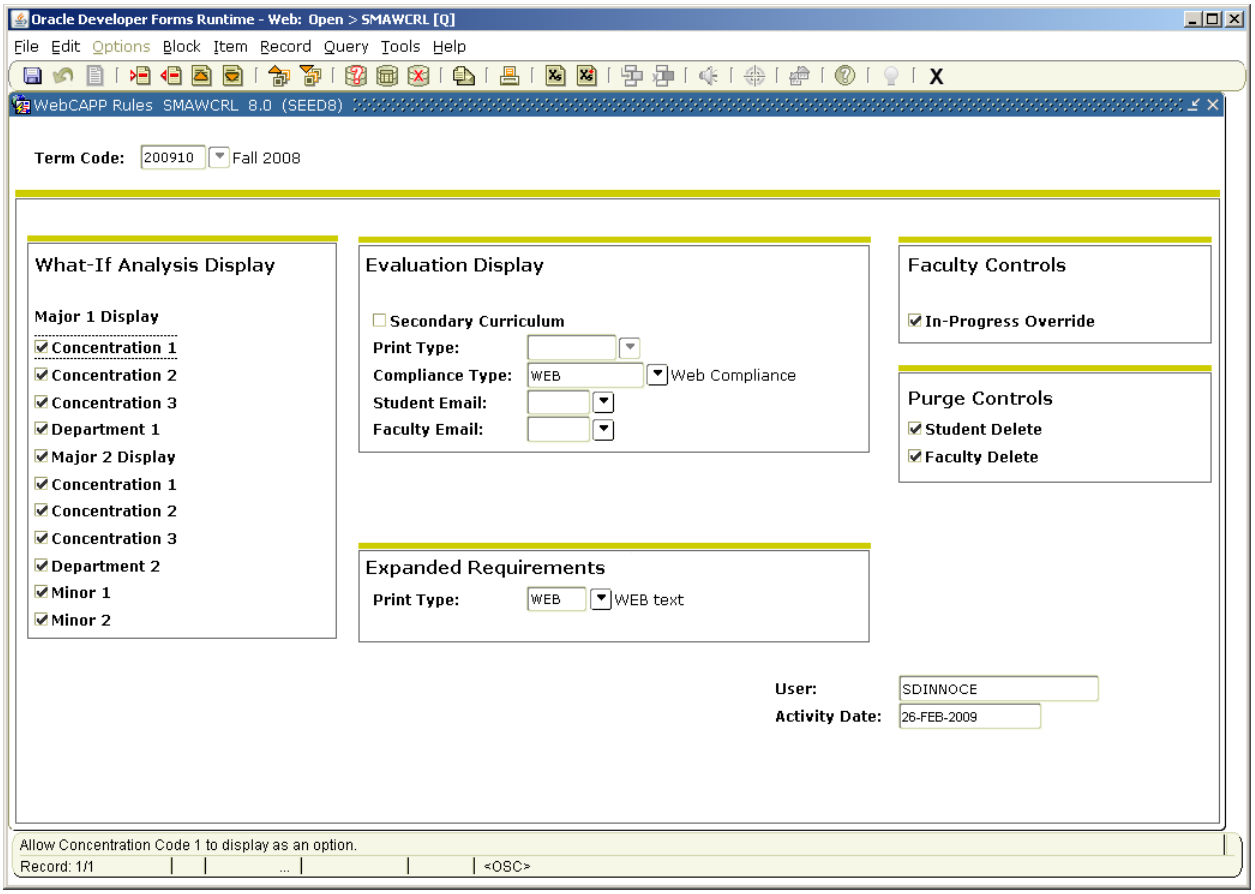
Record: 1/12 | ... | List of Valu... | <OSC>

WebCAPP Rules

Purposes

The WebCAPP Rules Form (SMAWCRL) is used to set up the controls for the WebCAPP rules for evaluation requests.

Banner form

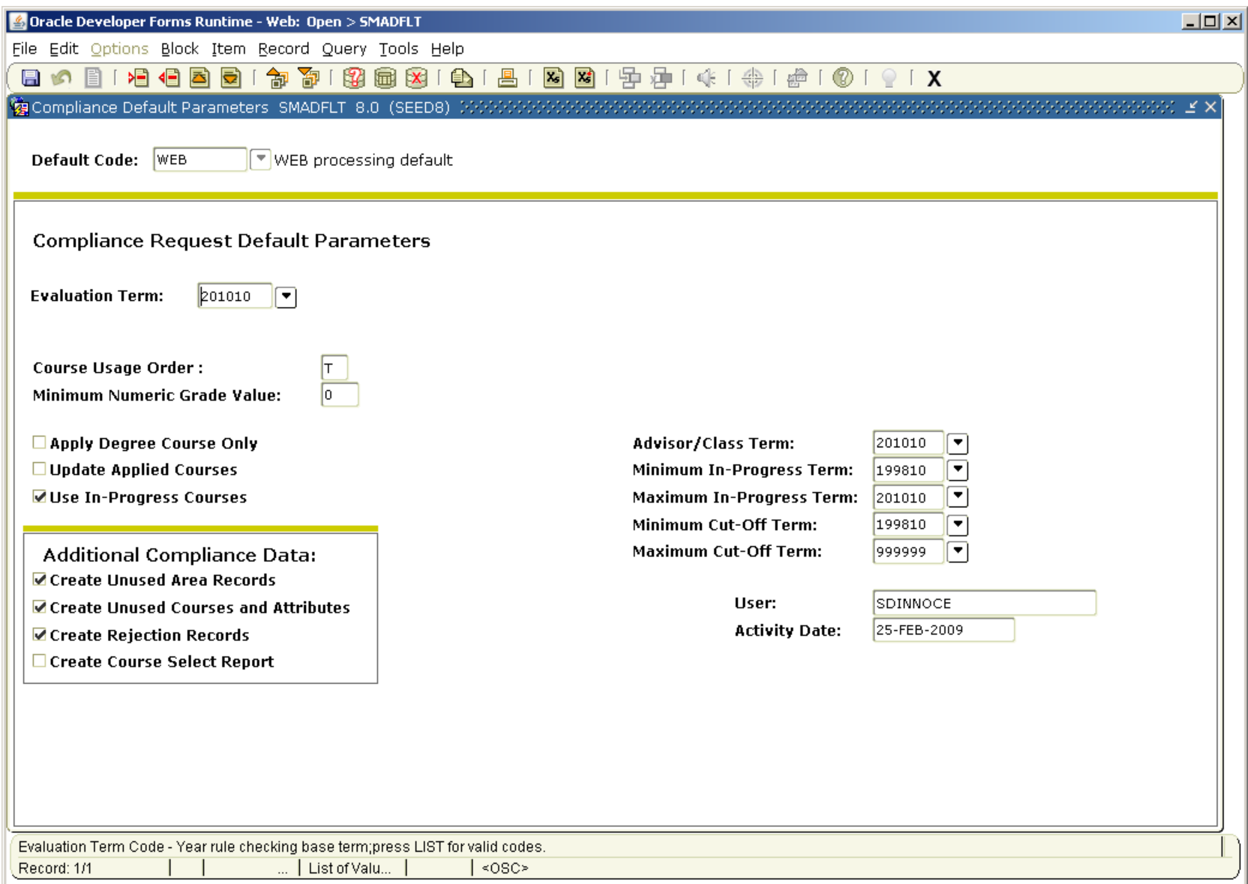


Compliance Default Parameters

Purpose

The Compliance Default Parameters Form (SMADFLT) is used to define default values for processing compliance requests.

Banner form

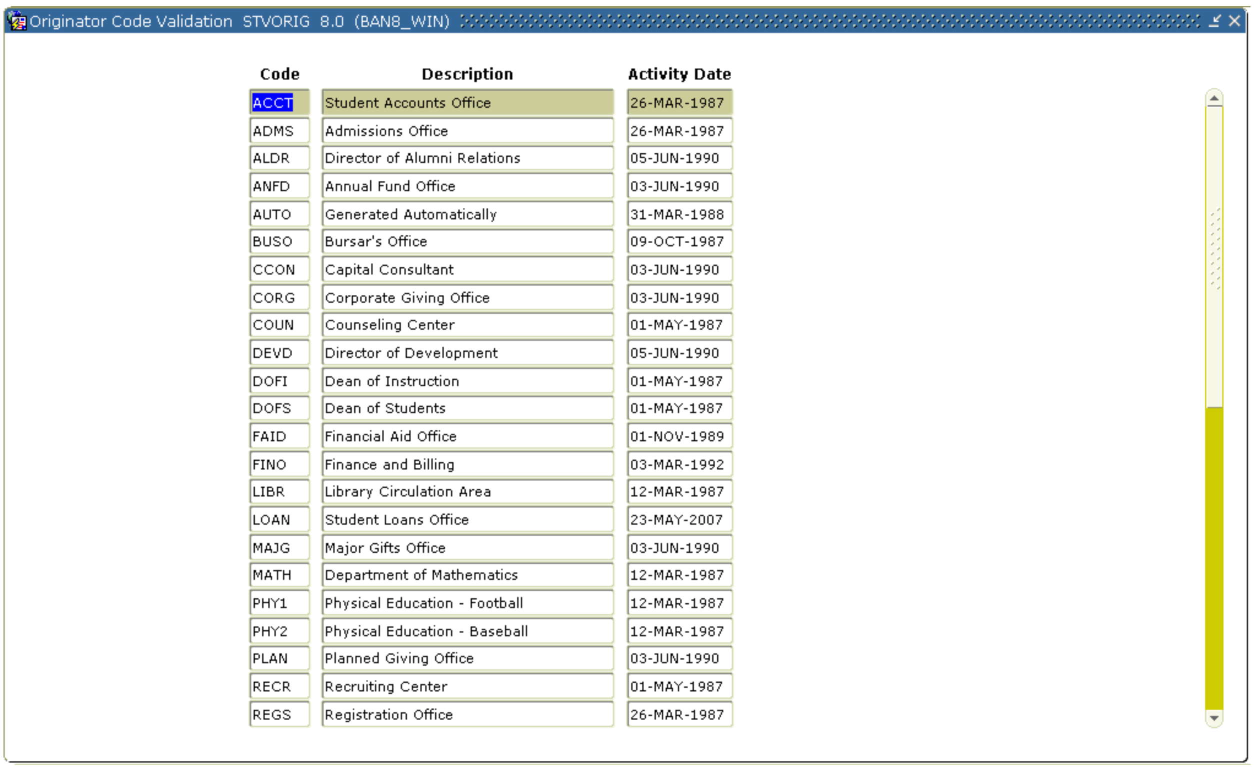


Originator Code Validation

Purpose

The Originator Code Validation Form (STVORIG) is used to create, update, insert, and delete originator codes (i.e., Student Accounts Office, Bursar's Office, Dean of Students, etc.). Forms in several modules use this form to validate the originator codes.

Banner form


Originator Code Validation STVORIG 8.0 (BAN8_WIN)

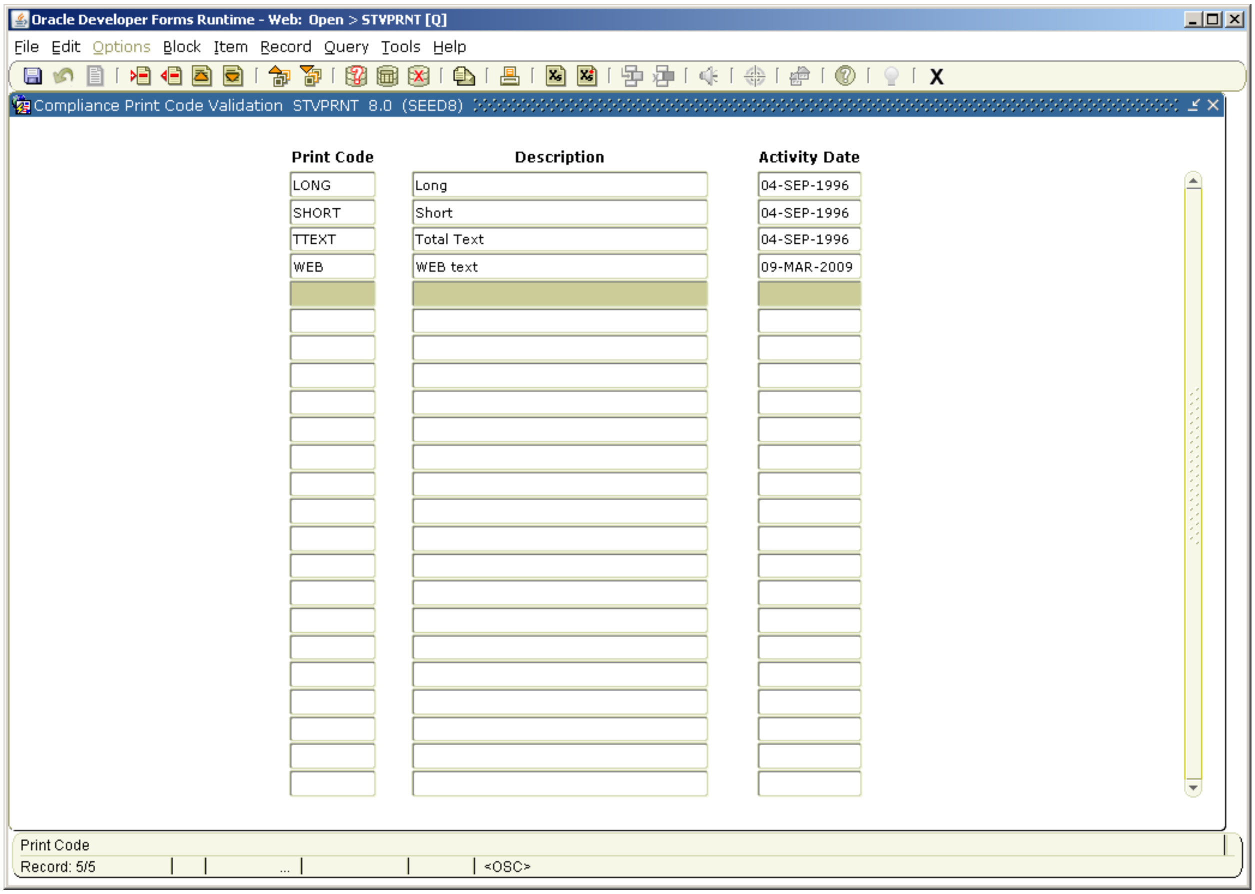
Code	Description	Activity Date
ACCT	Student Accounts Office	26-MAR-1987
ADMS	Admissions Office	26-MAR-1987
ALDR	Director of Alumni Relations	05-JUN-1990
ANFD	Annual Fund Office	03-JUN-1990
AUTO	Generated Automatically	31-MAR-1988
BUSO	Bursar's Office	09-OCT-1987
CCON	Capital Consultant	03-JUN-1990
CORG	Corporate Giving Office	03-JUN-1990
COUN	Counseling Center	01-MAY-1987
DEVD	Director of Development	05-JUN-1990
DOFI	Dean of Instruction	01-MAY-1987
DOFS	Dean of Students	01-MAY-1987
FAID	Financial Aid Office	01-NOV-1989
FINO	Finance and Billing	03-MAR-1992
LIBR	Library Circulation Area	12-MAR-1987
LOAN	Student Loans Office	23-MAY-2007
MAJG	Major Gifts Office	03-JUN-1990
MATH	Department of Mathematics	12-MAR-1987
PHY1	Physical Education - Football	12-MAR-1987
PHY2	Physical Education - Baseball	12-MAR-1987
PLAN	Planned Giving Office	03-JUN-1990
RECR	Recruiting Center	01-MAY-1987
REGS	Registration Office	26-MAR-1987

Compliance Print Code Validation

Purpose

The Compliance Print Code Validation Form (STVPRNT) is used to define and maintain compliance print codes. Print codes can be assigned to text for numerous data entities, such as programs, areas, groups, and various types of restrictions and requirements. The print codes are then assigned to print on various types of compliance hardcopy output depending on conditions, such as the data contained on the output and the results of the compliance test.

Banner form

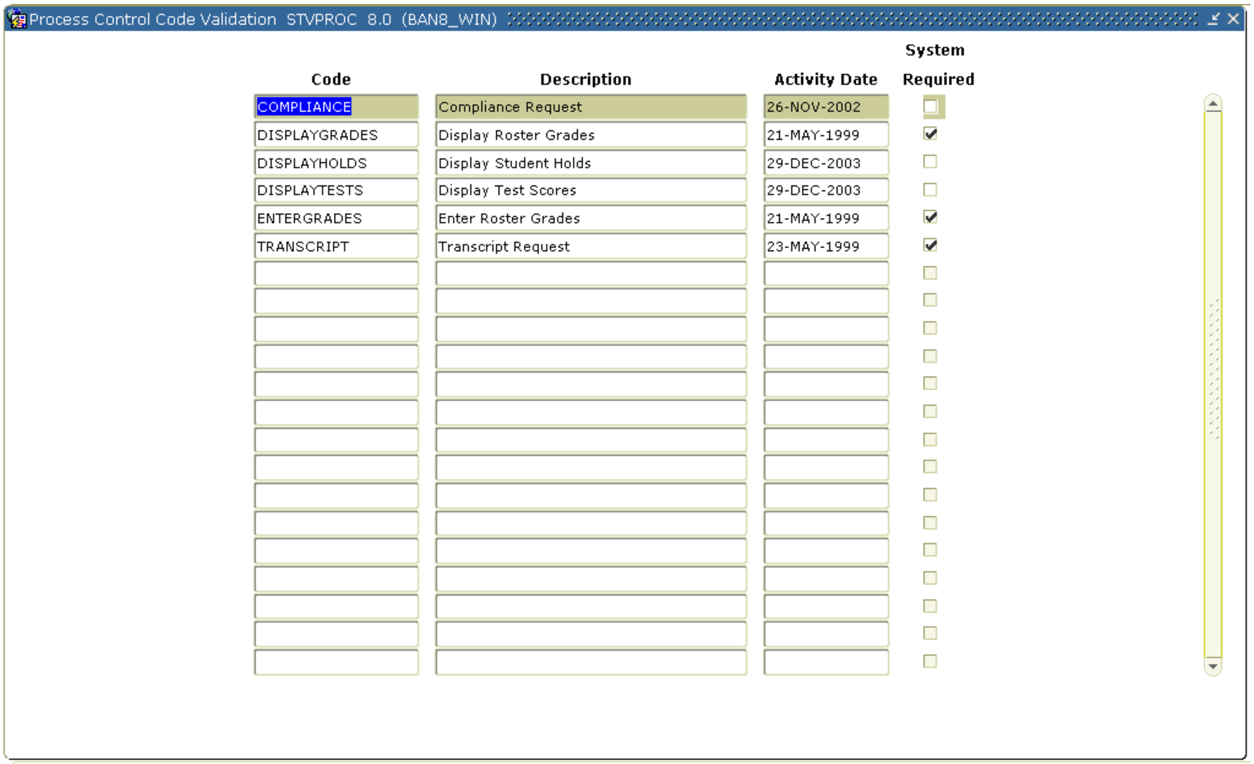


Process Control Code Validation

Purpose

The Process Control Code Validation Form (STVPROC) is used to create, update, insert, and delete the process codes that are allocated to either a faculty attribute or advisor type and control access to the Electronic Grade Book and Academic Transcript in Faculty and Advisors Self-Service. The following value is required in Banner Student for use in security processing in Student Self-Service for the Web for CAPP module:

Banner form


Process Control Code Validation STVPROC 8.0 (BAN8_WIN)

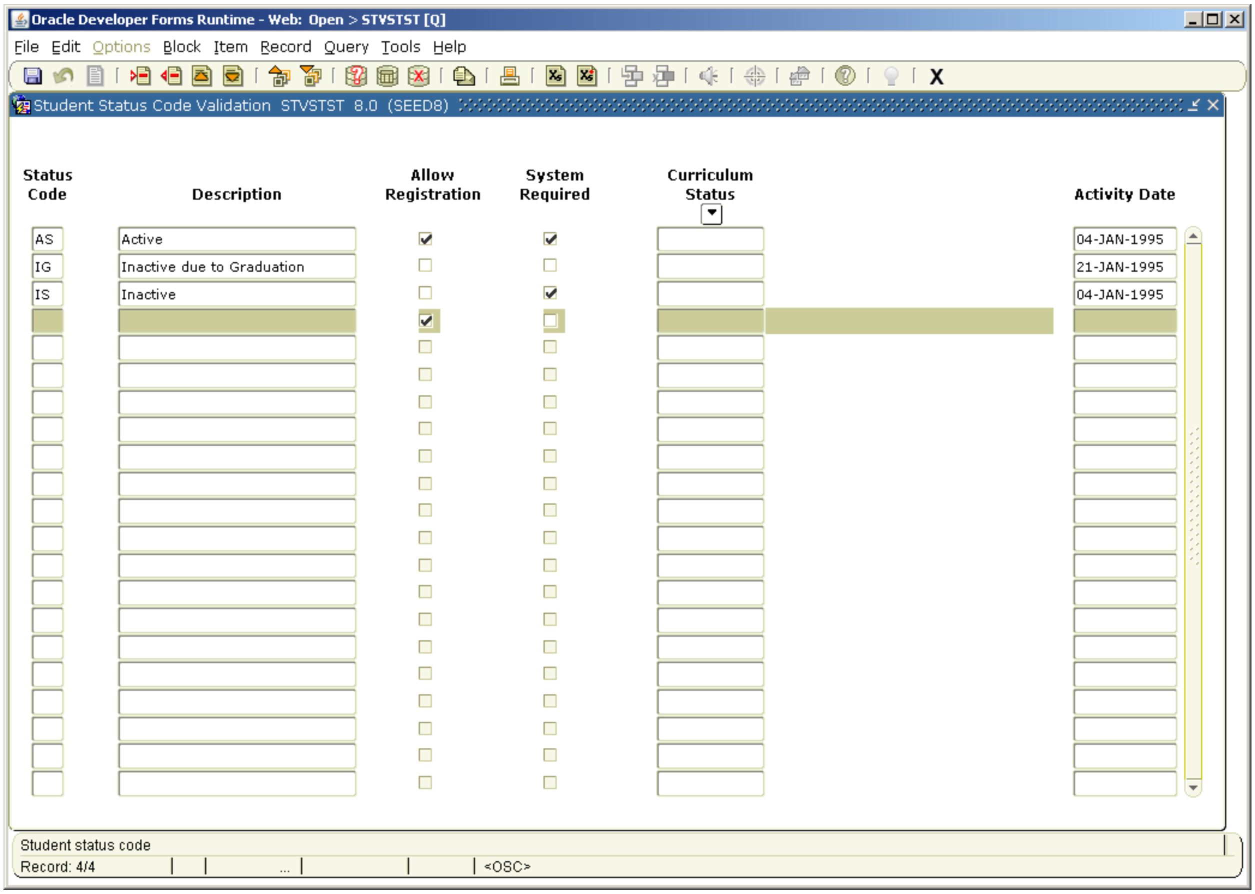
Code	Description	Activity Date	System Required
COMPLIANCE	Compliance Request	26-NOV-2002	☐
DISPLAYGRADES	Display Roster Grades	21-MAY-1999	☑
DISPLAYHOLDS	Display Student Holds	29-DEC-2003	☐
DISPLAYTESTS	Display Test Scores	29-DEC-2003	☐
ENTERGRADES	Enter Roster Grades	21-MAY-1999	☑
TRANSCRIPT	Transcript Request	23-MAY-1999	☑

Student Status Code Validation

Purpose

The Student Status Code Validation Form (STVSTST) is used to create, update, insert, and delete student status codes (i.e., Active, Withdrawn, Inactive Due to Graduation, etc.). Forms in several modules use this form to validate the student status codes.

Banner form



Account Detail for Term Setup

Introduction

You can set up rules in Accounts Receivable that enable students to view their account information, for a term, on a web page in Student Self-Service. This page lets students see, at a glance, the amount they owe to the institution.

The page displays all of the charges and payments for a chosen term, including current assessments if enabled. Institutions may choose to display authorized financial aid, aid memos, other Accounts Receivable memos (for example, third party credits, deposits, exemptions), and installment plans. The institution may also choose to display a Pay Now button on the page to enable students to access the payment gateway to make a payment for the term.

Note: In order to use this feature, Banner Accounts Receivable and Student Self-Service must be installed.

Forms needed

The table lists the setup forms needed for this feature.

Form Description	Banner Name
Account Receivable Term Control	TSATERM
Student Billing Control	TSACTRL
Housing Term Control	SLATERM
Term Control	SOATERM

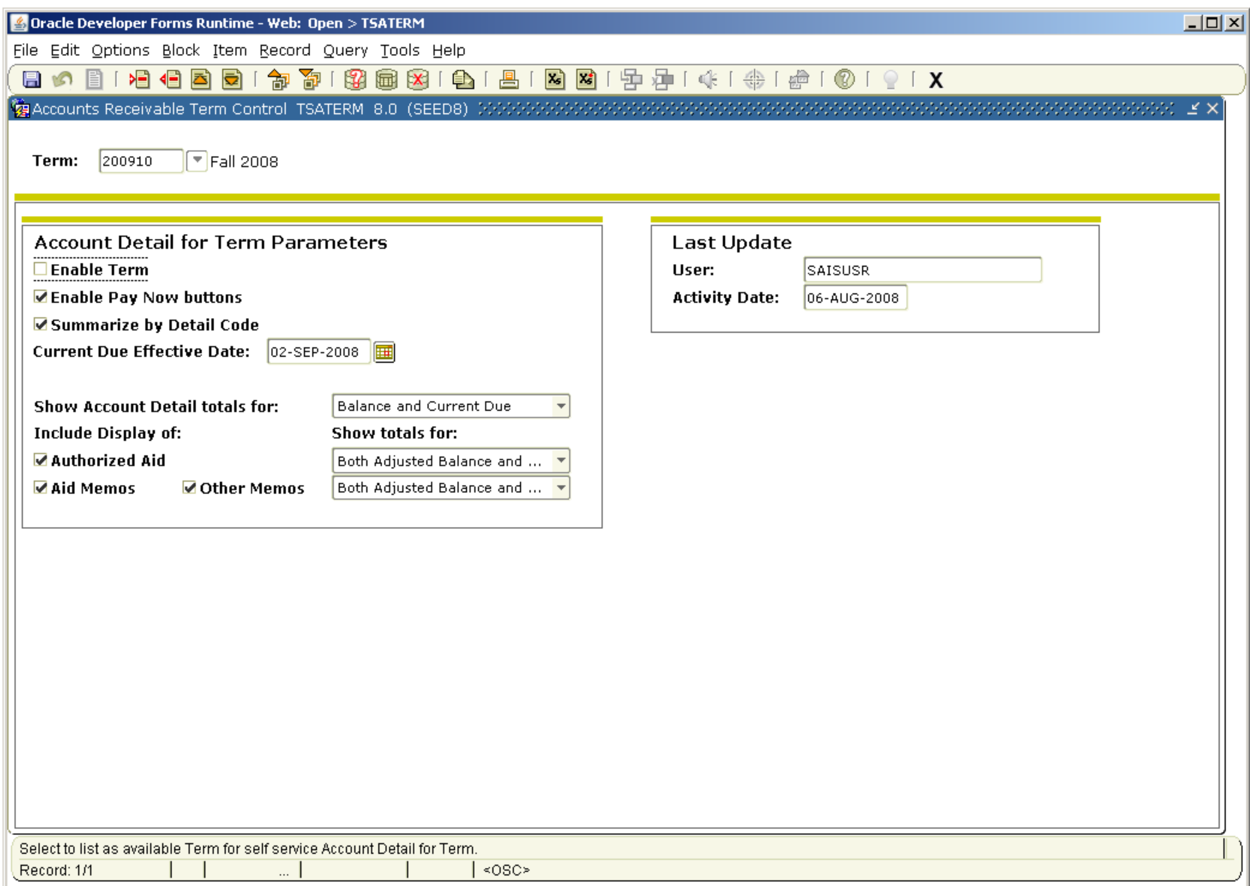
Accounts Receivable Term Control

Purpose

The Accounts Receivable Term Control Form (TSATERM) is used to enable the terms and to specify the types of information and calculation totals the institution wants to display on the Account Detail for Term page. The term you select on this form is the term for which you want to create rules.

Selecting **Enable Term** includes the term in the drop-down choices for terms on the Account Detail for Term Self-Service page. Make your other selections based on what you want to display on the page.

Banner form



Student Billing Control

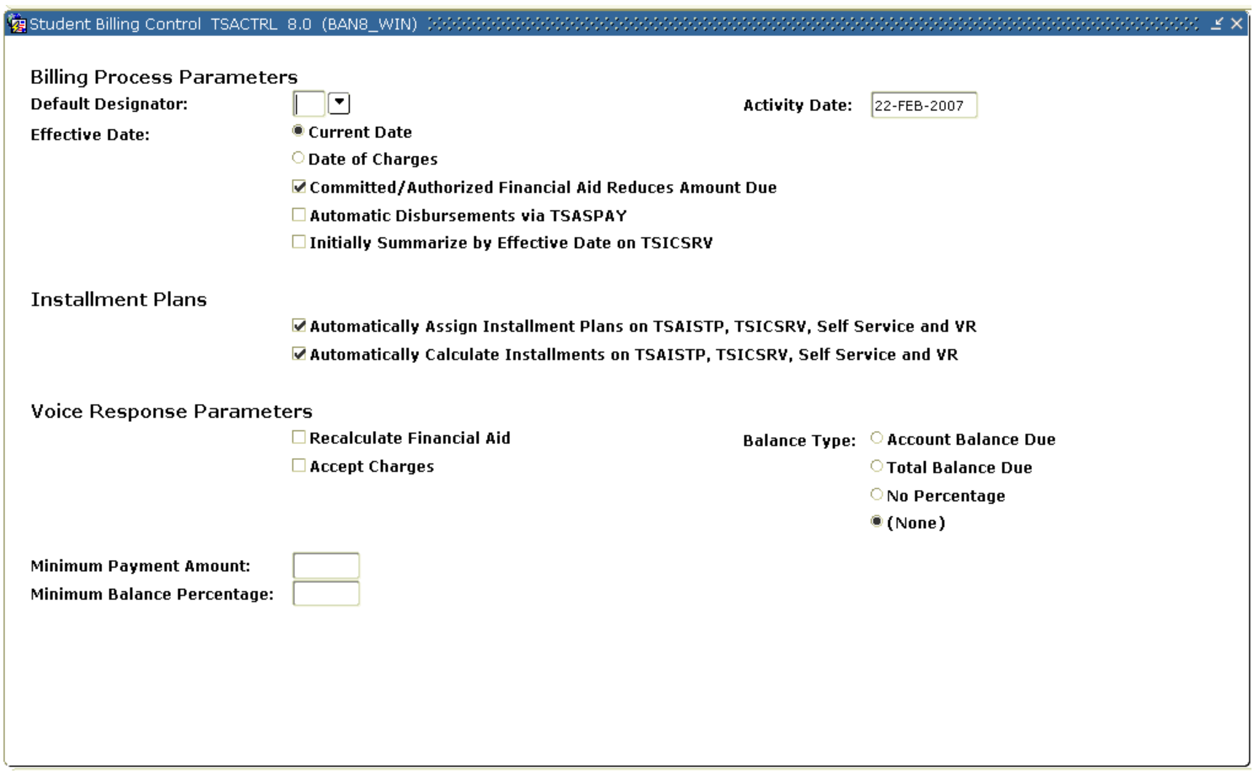
Purpose

The Student Billing Control Form (TSACTRL) is used to enter the parameters for the operation and control process for the Student Accounts Receivable module at your institution.

The information captured on this form is used to determine the flow of information and the operation of Student Accounts Receivable.

In the Installment Plans section on TSACTRL, make the appropriate selection regarding assignment and calculation of automated installment plans. The **Automatically Calculate Installments…** checkbox must be selected for installment plans to be displayed on the Account Detail for Term page in Student Self-Service. If the **Automatically Assign Installment Plans…** checkbox is also selected, eligible students will be added to an automated plan.

Banner form


Student Billing Control TSACTRL 8.0 (BAN8_WIN)

Billing Process Parameters

Default Designator:

Activity Date: 22-FEB-2007

Effective Date:
- (•) Current Date
- ( ) Date of Charges

- [x] Committed/Authorized Financial Aid Reduces Amount Due
- [ ] Automatic Disbursements via TSASPAY
- [ ] Initially Summarize by Effective Date on TSICSRV

Installment Plans

- [x] Automatically Assign Installment Plans on TSAISTP, TSICSRV, Self Service and VR
- [x] Automatically Calculate Installments on TSAISTP, TSICSRV, Self Service and VR

Voice Response Parameters

- [ ] Recalculate Financial Aid
- [ ] Accept Charges

Balance Type:
- ( ) Account Balance Due
- ( ) Total Balance Due
- ( ) No Percentage
- (•) (None)

Minimum Payment Amount:

Minimum Balance Percentage:

Housing Term Control

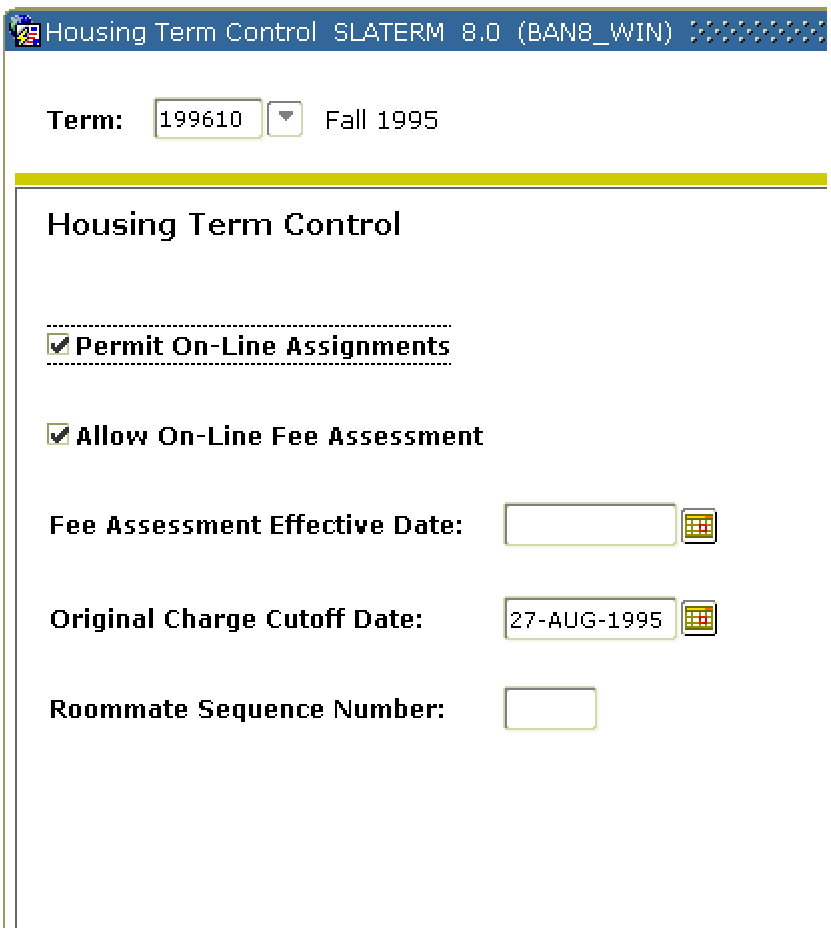
Purpose

The Housing Term Control Form (SLATERM) allows for the control of certain housing assignment and assessment attributes. These attributes include the ability to permit assignments, the ability to assess housing, meal plan, and phone assessments, the effective date to be used for the assessments, and the roommate sequence number.

Selecting the **Permit On-line Assessments** checkbox enables housing fee assessment.

Note: An entry must be made on the Term Code Validation Form (STVTERM) prior to creating information on this form. This data must be entered prior to creating housing assignments and assessing fees.

Banner form



Term Control

Purpose

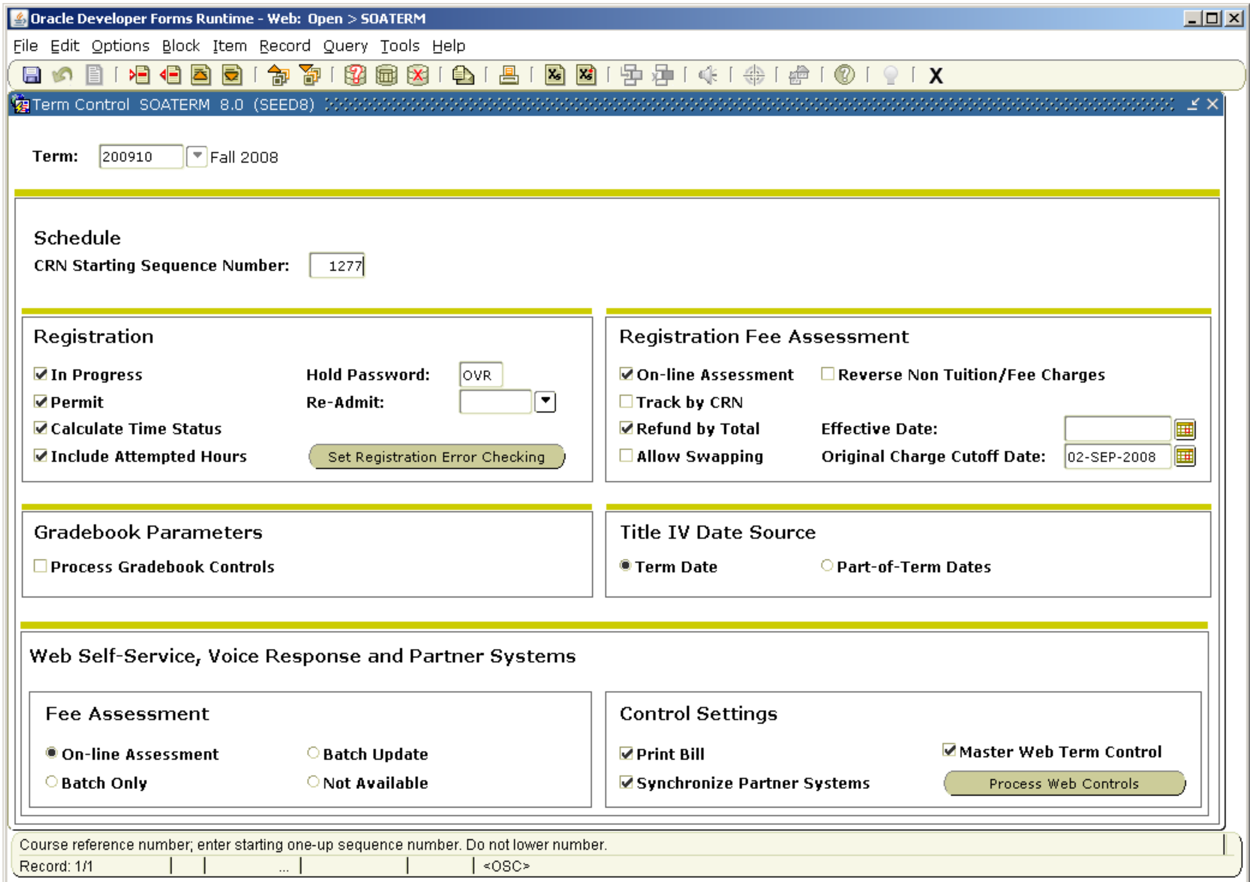
Use the Term Control Form (SOATERM) to establish controls for a specific term. These controls affect the areas of catalog, schedule, registration, registration fee assessment, and telephone registration processing.

In the Registration Fee Assessment block on SOATERM, select the **On-line Assessment** checkbox to enable tuition and fee assessment.

In the Web Self-Service, Voice Response, and Partner Systems block on SOATERM, select the **On-line Assessment** radio button to enable housing, tuition and fee assessment on the Account Detail for Term page in Student Self-Service.

Note: Prior to entering information on this form, a term must be created on the Term Code Validation Form (STVTERM).

Banner form


Oracle Developer Forms Runtime - Web: Open > SOATERM
File Edit Options Block Item Record Query Tools Help
Term Control SOATERM 8.0 (SEED8)
Term: 200910 Fall 2008
Schedule
CRN Starting Sequence Number: 1277
Registration
In Progress
Permit
Calculate Time Status
Include Attempted Hours
Hold Password: OVR
Re-Admit:
Set Registration Error Checking
Registration Fee Assessment
On-line Assessment
Reverse Non Tuition/Fee Charges
Track by CRN
Refund by Total
Allow Swapping
Effective Date:
Original Charge Cutoff Date: 02-SEP-2008
Gradebook Parameters
Process Gradebook Controls
Title IV Date Source
Term Date
Part-of-Term Dates
Web Self-Service, Voice Response and Partner Systems
Fee Assessment
On-line Assessment
Batch Update
Batch Only
Not Available
Control Settings
Print Bill
Master Web Term Control
Synchronize Partner Systems
Process Web Controls
Course reference number; enter starting one-up sequence number. Do not lower number.
Record: 1/1
<OSC>

Providing Access

Public access area vs. Secure access area

On your Banner Self-Service homepage, you will see several areas. Most of the links on your homepage will be to *public access* areas. For Student Self-Service, this includes Campus Directory, Course Catalog, and Class Schedule information. Prospective students can also apply for admission and view general financial aid information.

Note: The information in the Course Catalog and Class Schedule Web pages is dynamic, which means that the data is extracted directly from the database.

Other Student Self-Service features, such as admissions, registration, student records, and financial aid, are located in the *secure* area. Students can use the Web for many administrative functions that traditionally required your institution's full-time staff during scheduled office hours. Because these options put the student in direct touch with information on record in the Banner Student database, the student must enter a valid Banner ID and personal identification number (PIN) to access these functions.

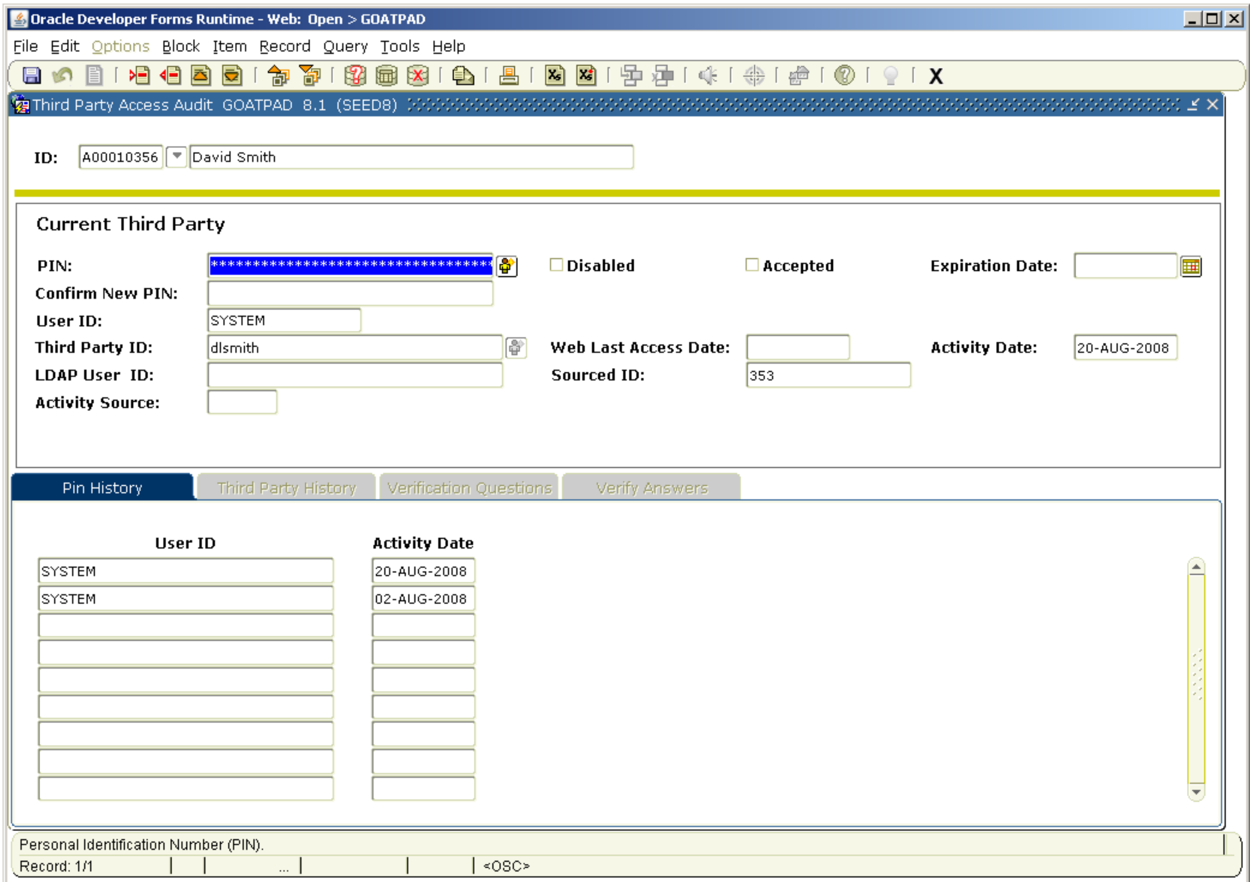
Banner ID and pin

All features in Self-Service for Students are available in the secure area of the Web. This means that all students must have a Banner ID and a Personal Identification Number (PIN). IDs and passwords are maintained on the Third Party Access Audit Form (GOATPAD). The Third Party Access Form (GOATPAC) is used to reset a Web User's PIN. The GOATPAC PIN Reset function will use the PIN Preferences defined on the GUAPPRF form. Students must also be defined as active for the selected term on the General Student Form (SGASTDN).

If a student has forgotten his or her PIN, the system provides a means by which the student can log in. When a student logs in to Student Self-Service for the first time, the system prompts him or her to supply a security question and answer. This information is then used if the student later forgets his or her PIN. To change the security question and answer, the student can select the **Change Security Question** link on the Personal Information menu.

Note: The Third Party Audit Form (GOATPAD) displays confidential PIN information; this form should be restricted to key security administrators.

Banner form



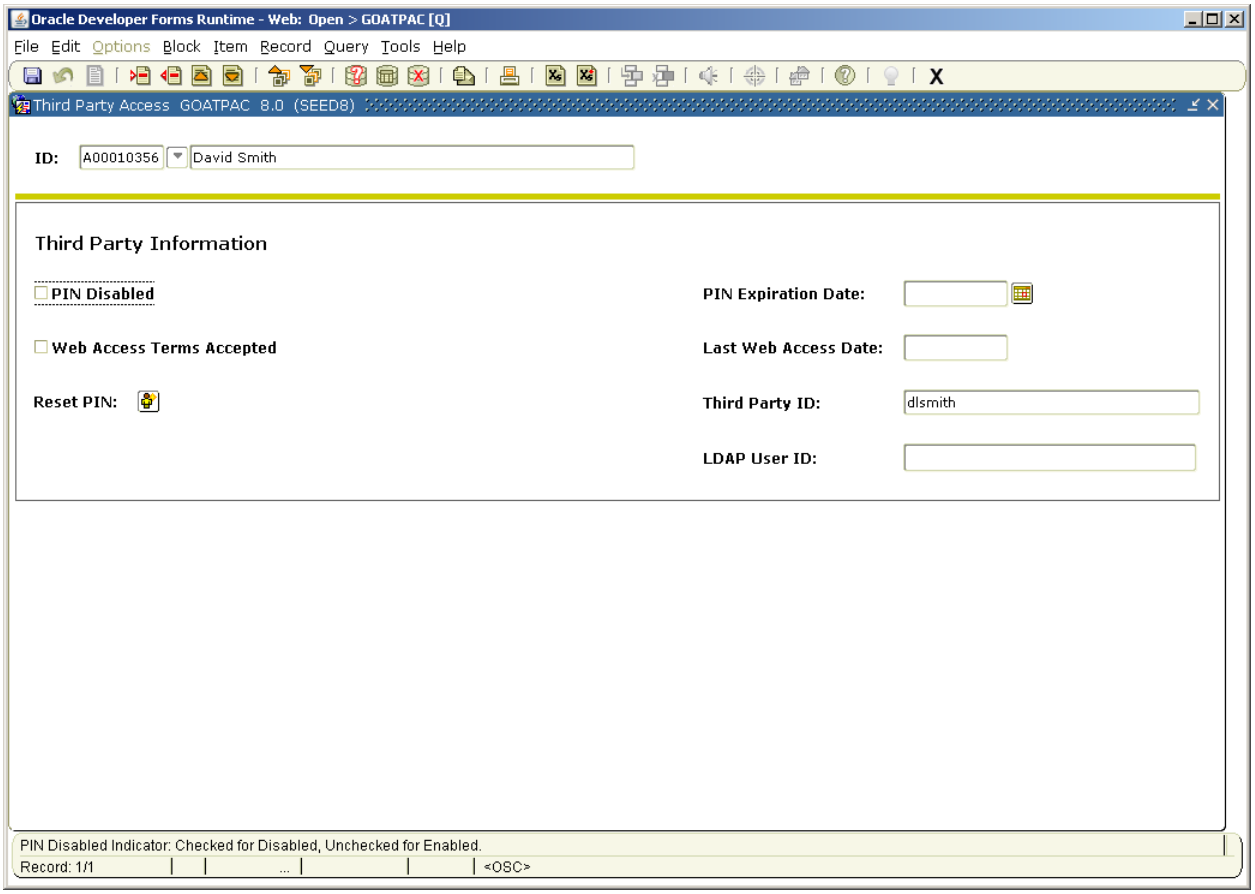
Steps

Follow these steps to give the student access to Student Self-Service.

1. Access the Third Party Access Audit Form (GOATPAD).
2. Enter the student's Banner ID in the key block.
3. Access the Current Third Party Information block.
4. Enter a PIN in the **PIN** field.

   Note: Leave all other fields blank.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Banner form



Steps

Follow these steps to reset a student’s PIN.

1. Access the Third Party Access Form (GOATPAC).
2. Enter the student's Banner ID in the key block.
3. Access the Third Party Information block.
4. Click the **Reset PIN** icon.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Web-Enabling a Term or Terms

Introduction

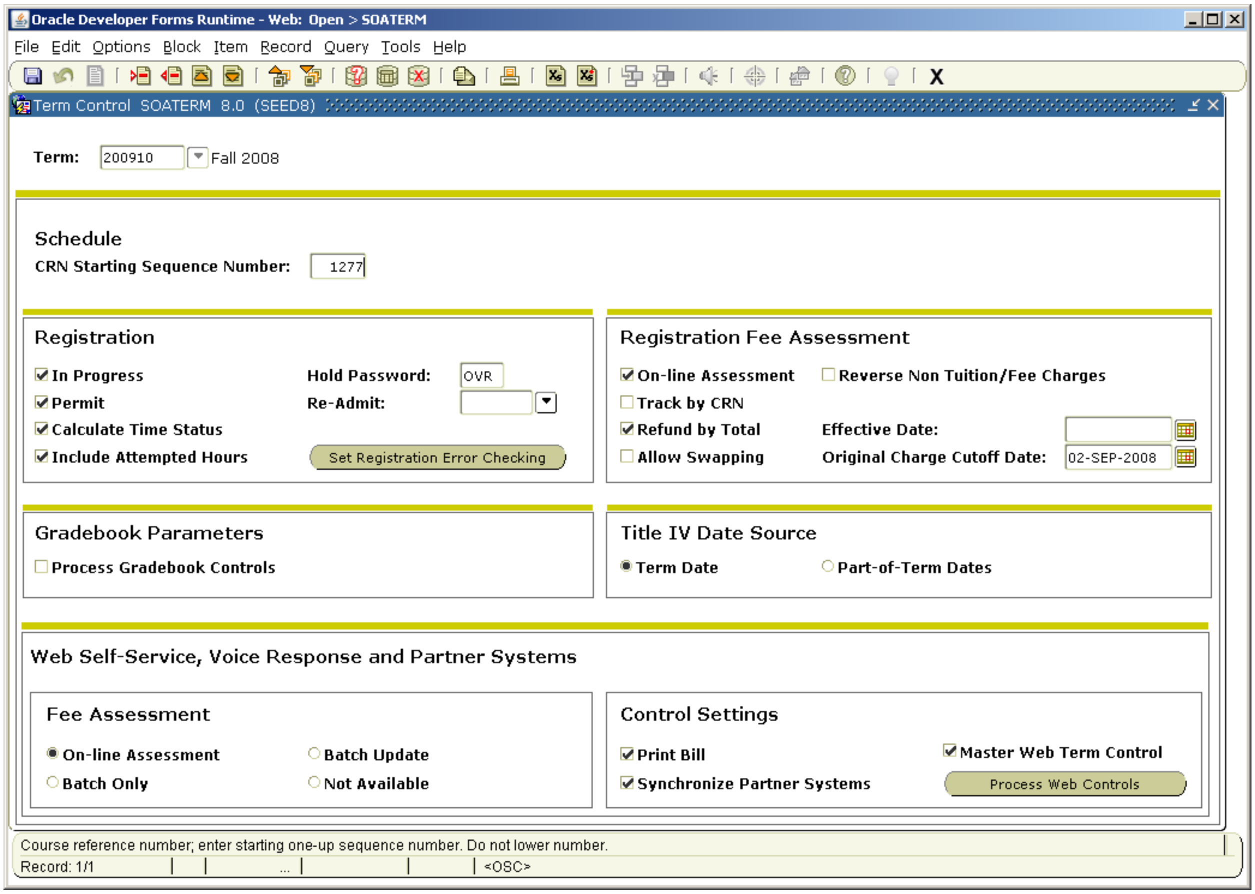
The Term Control Form (SOATERM) is used to establish controls for a specific term. These controls affect the catalog, schedule, registration, and fee assessment. The term values in the pull-down list on Student Self-Service come from the Term Control Form (SOATERM). Prior to entering information on this form, a term must be created on the Term Validation Form (STVTERM).

In order for a term to appear in Self-Service for Students, it must be Web-enabled. For a term to be available on the Web

- you must check the **Permit** checkbox under **Registration** on SOATERM
- select the **Master Web Term Control checkbox under Web Self-Service and Voice Response** on (SOATERM)
- select the current date is included in the date range defined in the Web Registration Dates block.

Note: A term may also be separately Web-enabled for WebCAPP. We cover how to Web-enable terms for WebCAPP later in this workbook.

Banner form



Steps

Follow these steps to web-enable your term for student access.

1. Access the Term Control Form (SOATERM).
2. Enter your term in the **Term** field.
3. Perform a **Next Block** function.
4. Click the **Permit** checkbox under Registration if students may begin registering. If you are opening catalog and schedule searches in advance of registration you may return later to check the Registration Permit checkbox.
5. Check Master Web Term Control.
6. Select **Base Part of Term** from the **Options** menu.
7. Perform a **Next Block** function.
8. In the Web Registration Dates block of the Part of Term and Web Registration

Controls window, enter a date range in the **Start Date** and **End Date** fields.

9. Click the **Save** icon.
10. Click the **Exit** icon.

Setting up the Course Catalog

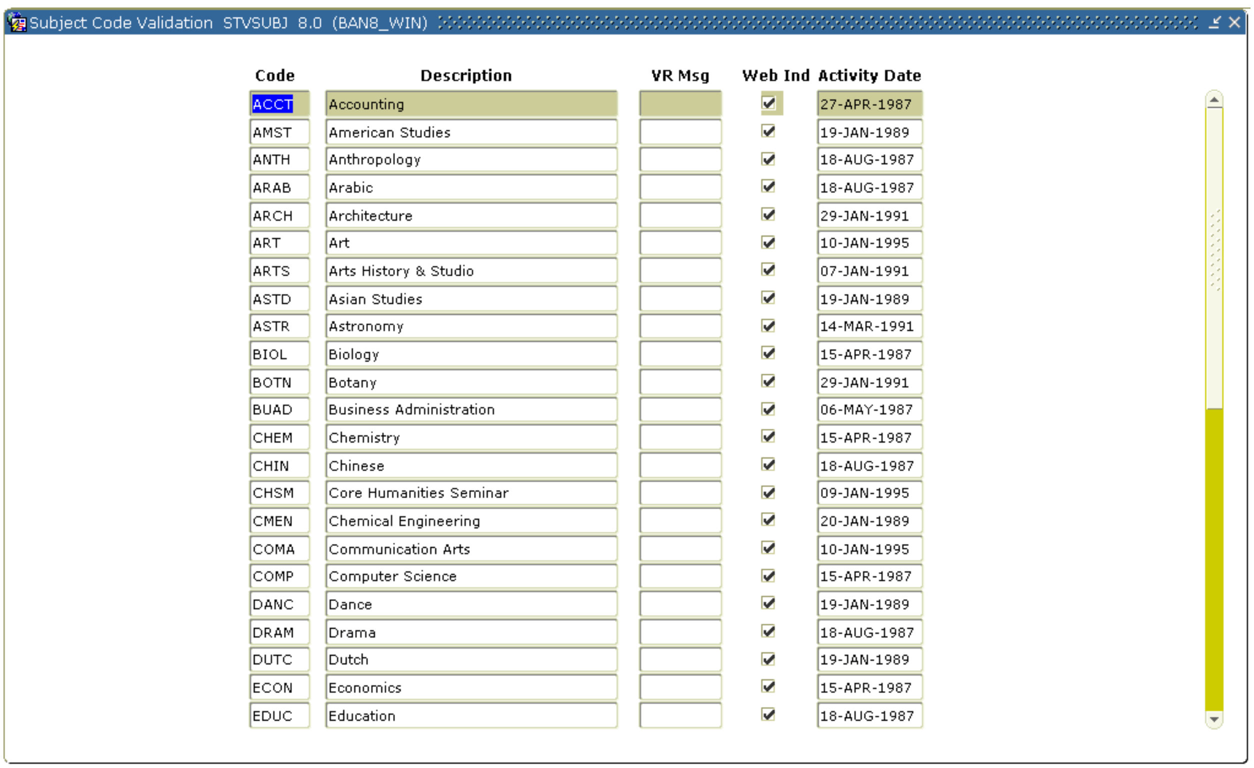
Introduction

The Course Catalog provides access to your institution's course catalog via the Internet. You can specify one or multiple terms to be available for viewing on the Web. The course catalog can display basic course information, such as credits, course description, prerequisites, and co requisites.

The following forms are required to set up the Course Catalog:

- Subject Code Validation Form (STVSUBJ)
- Term Control Form (SOATERM)
- Web Display List Customization (SOAWDSP)

Banner form



Subject Code Validation STVSUBJ 8.0 (BAN8_WIN)

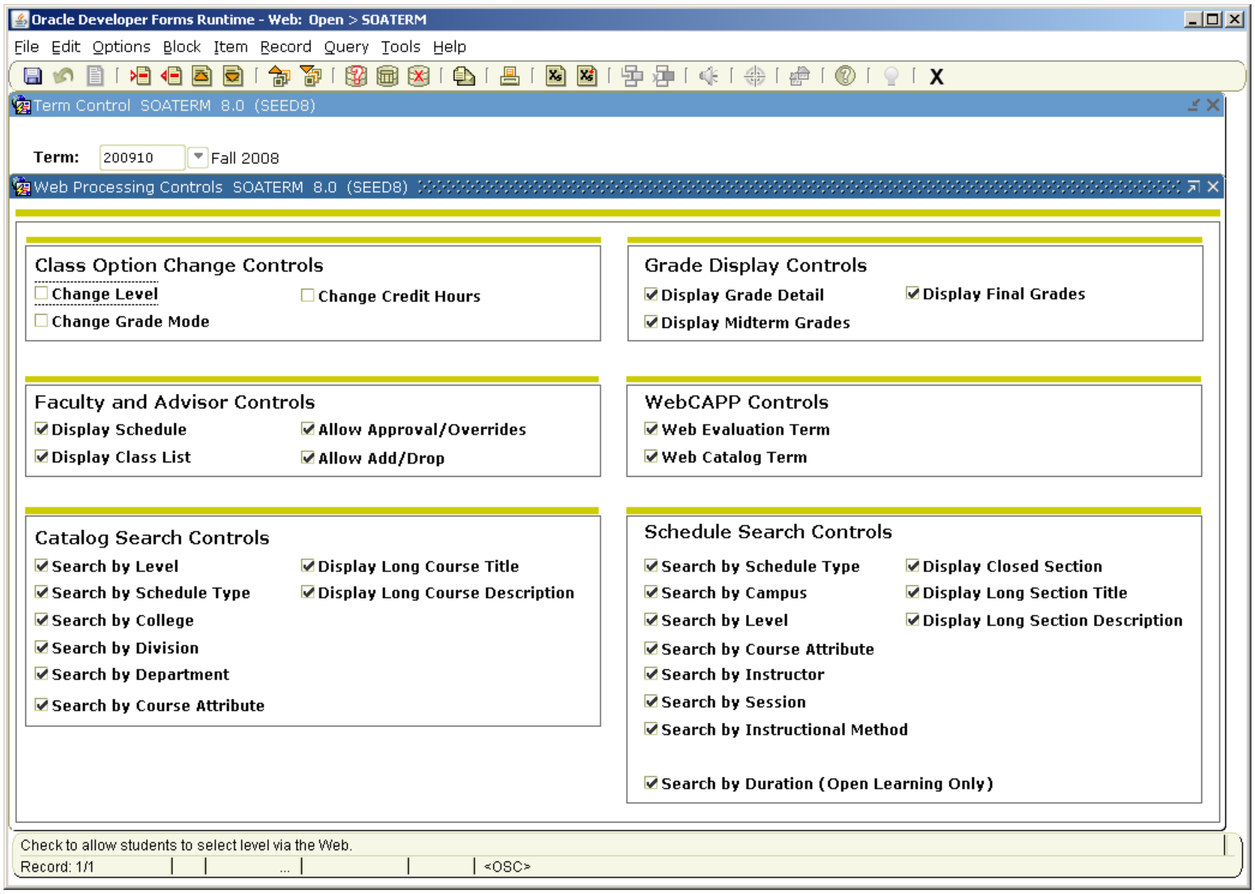
Code	Description	VR Msg	Web Ind	Activity Date
ACCT	Accounting		✔	27-APR-1987
AMST	American Studies		✔	19-JAN-1989
ANTH	Anthropology		✔	18-AUG-1987
ARAB	Arabic		✔	18-AUG-1987
ARCH	Architecture		✔	29-JAN-1991
ART	Art		✔	10-JAN-1995
ARTS	Arts History & Studio		✔	07-JAN-1991
ASTD	Asian Studies		✔	19-JAN-1989
ASTR	Astronomy		✔	14-MAR-1991
BIOL	Biology		✔	15-APR-1987
BOTN	Botany		✔	29-JAN-1991
BUAD	Business Administration		✔	06-MAY-1987
CHEM	Chemistry		✔	15-APR-1987
CHIN	Chinese		✔	18-AUG-1987
CHSM	Core Humanities Seminar		✔	09-JAN-1995
CMEN	Chemical Engineering		✔	20-JAN-1989
COMA	Communication Arts		✔	10-JAN-1995
COMP	Computer Science		✔	15-APR-1987
DANC	Dance		✔	19-JAN-1989
DRAM	Drama		✔	18-AUG-1987
DUTC	Dutch		✔	19-JAN-1989
ECON	Economics		✔	15-APR-1987
EDUC	Education		✔	18-AUG-1987

Steps

Follow these steps to web-enable each subject that you want displayed on the Web.

1. Access the Subject Code Validation Form (STVSUBJ).
2. Select the **Web Indicator** checkbox to web-enable to subject.
3. Click the **Save** icon.
4. Click the **Exit** icon.

Banner form

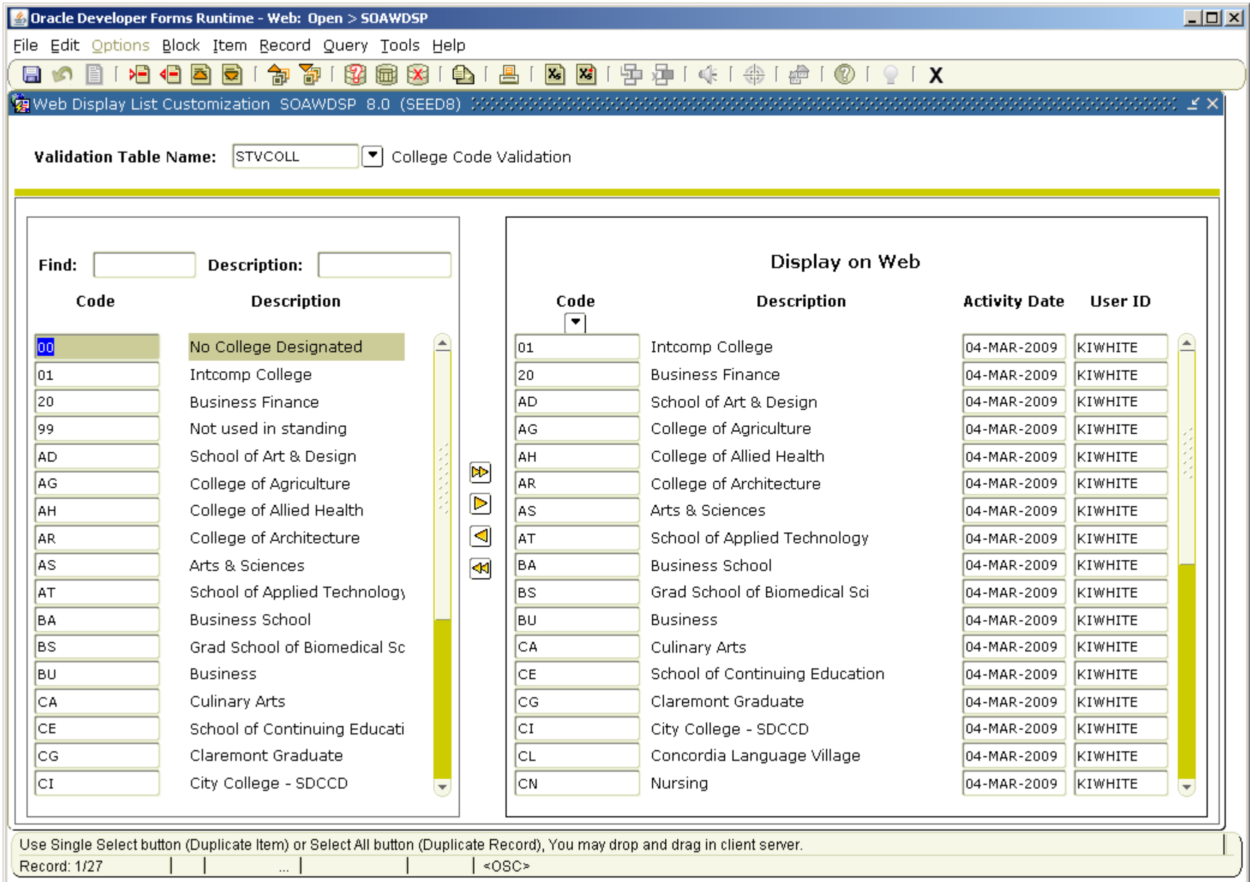


Steps

Follow these steps to select each term and search options that you want included in the Web course catalog.

1. Access the Term Control Form (SOATERM).
2. Enter your term in the **Term** field.
3. Perform a **Next Block** function.
4. Select Web Processing Controls from the **Options** Menu.
5. Select the **Web Catalog Term** checkbox.
6. Click the **Save** icon.
7. Perform a **Next Block** function.
8. Select the desired search options from the **Catalog Search Controls** section.
    - To include levels, select the **Search by Level** checkbox.
    - To include schedule type, select the **Search by Schedule Type** checkbox.
    - To include colleges, select the **Search by College** checkbox.
    - To include divisions, select the **Search by Division** checkbox.
    - To include departments, select the **Search by Department** checkbox.
    - To include courses, select the **Search by Course Attribute** checkbox.
    - To allow the search and display of long course titles, select the **Display Long Course Title** checkbox.
    - To allow the search and display of long course descriptions, select the **Display Long Course Description** checkbox.
9. Click the **Save** icon.

Banner form


Oracle Developer Forms Runtime - Web: Open > SOAWDSP
File Edit Options Block Item Record Query Tools Help
Web Display List Customization SOAWDSP 8.0 (SEED8)
Validation Table Name: STVCOLL College Code Validation
Find: Description:
Code Description
00 No College Designated
01 Intcomp College
20 Business Finance
99 Not used in standing
AD School of Art & Design
AG College of Agriculture
AH College of Allied Health
AR College of Architecture
AS Arts & Sciences
AT School of Applied Technolog
BA Business School
BS Grad School of Biomedical Sc
BU Business
CA Culinary Arts
CE School of Continuing Educati
CG Claremont Graduate
CI City College - SDCCD
Display on Web
Code Description Activity Date User ID
01 Intcomp College 04-MAR-2009 KIWHITE
20 Business Finance 04-MAR-2009 KIWHITE
AD School of Art & Design 04-MAR-2009 KIWHITE
AG College of Agriculture 04-MAR-2009 KIWHITE
AH College of Allied Health 04-MAR-2009 KIWHITE
AR College of Architecture 04-MAR-2009 KIWHITE
AS Arts & Sciences 04-MAR-2009 KIWHITE
AT School of Applied Technology 04-MAR-2009 KIWHITE
BA Business School 04-MAR-2009 KIWHITE
BS Grad School of Biomedical Sci 04-MAR-2009 KIWHITE
BU Business 04-MAR-2009 KIWHITE
CA Culinary Arts 04-MAR-2009 KIWHITE
CE School of Continuing Education 04-MAR-2009 KIWHITE
CG Claremont Graduate 04-MAR-2009 KIWHITE
CI City College - SDCCD 04-MAR-2009 KIWHITE
CL Concordia Language Village 04-MAR-2009 KIWHITE
CN Nursing 04-MAR-2009 KIWHITE
Use Single Select button (Duplicate Item) or Select All button (Duplicate Record), You may drop and drag in client server.
Record: 1/27 ... <OSC>

Steps

Follow these steps to specify which validation codes are to be displayed on the Web for the following validation tables:

- Level Code Validation (STVLEVL)
- Schedule Type Code Validation (STVSCHD)
- College Code Validation (STVCOLL)
- Division Code Validation (STVDIVS)
- Department Code Validation (STVDEPT)
- Attribute Validation (STVATTR)

1. Access the Web Display List Customization Form (SOAWDSP).
2. Enter the code for the desired validation table.

   Example: *STVLEVL*.
3. Perform a **Next Block** function.
4. Enter the valid code for the item you wish to display on the web.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Setting up the Class Schedule

The Class Schedule

The Class Schedule provides access to your institution's class schedule via the Internet. You can specify one or multiple terms to be available for viewing on the Web.

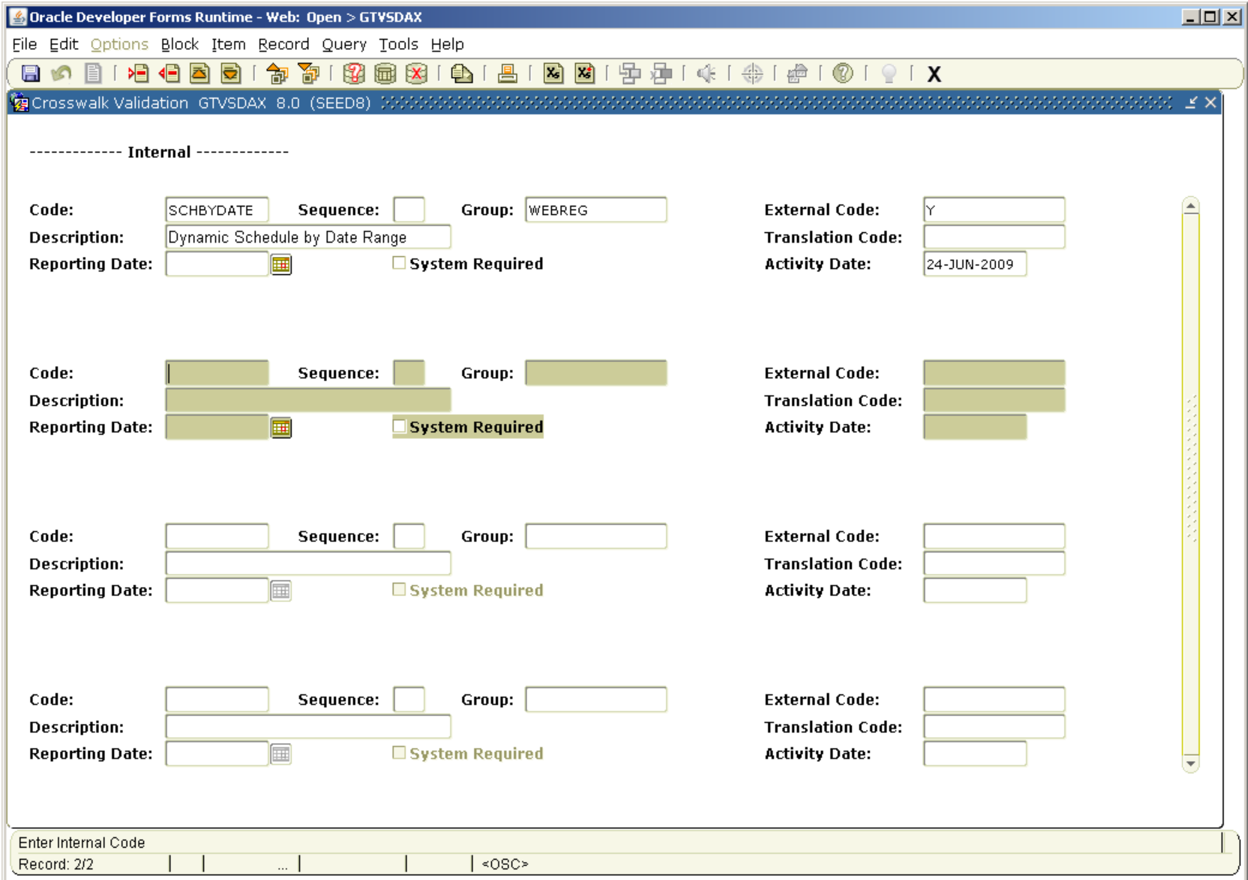
The following forms are required to set up the Course Schedule:

- Term Control Form (SOATERM)
- Web Display List customization (SOAWDSP)
- Crosswalk Validation Form (GTVSDAX)
- Schedule Form (SSASECT)
- Section Syllabus Form (SSASYLB)

Class Schedule Search Selection page

On this page users begin their search of the class schedule by choosing a term from the pull-down list or entering a date range.

Banner form



Steps

Follow these steps to display the **Search by Date Range** fields.

1. Access the Crosswalk Validation Form (GTVSDAX).
2. Enter these values:

Field	Value
Code	SCHBYDATE
Sequence	(blank)
Group	WEBREG
Description	Dynamic Schedule by date range

External Code	To display the Search by Date Range fields, enter *Y*. If your institution does not want to permit searching by date range, enter *N*.

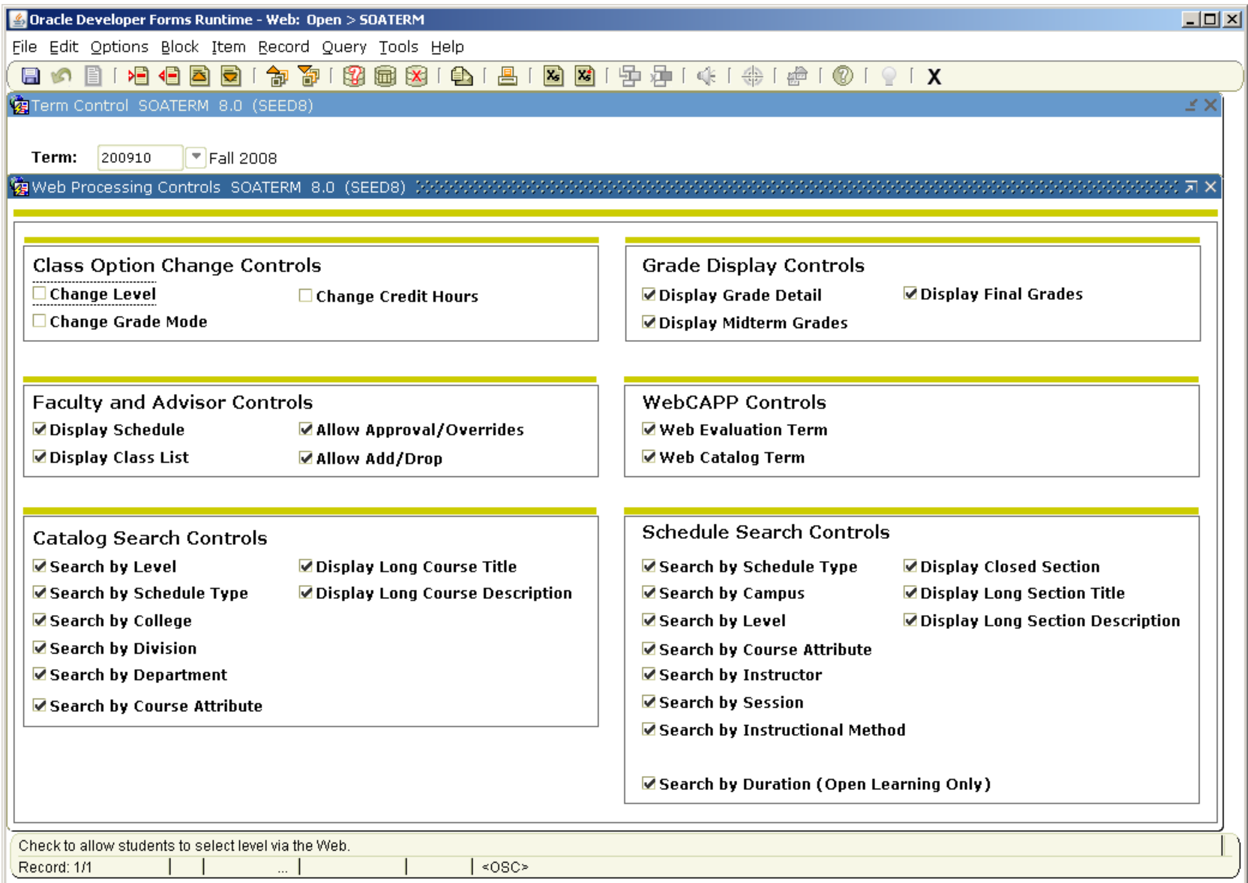
3. Click the **Save** icon.

4. Click the **Exit** icon.

Class Schedule Search page

On the Class Schedule Search page a user can choose from a variety of selection options to narrow the search for classes. At a minimum, the user must select a subject.

Banner form

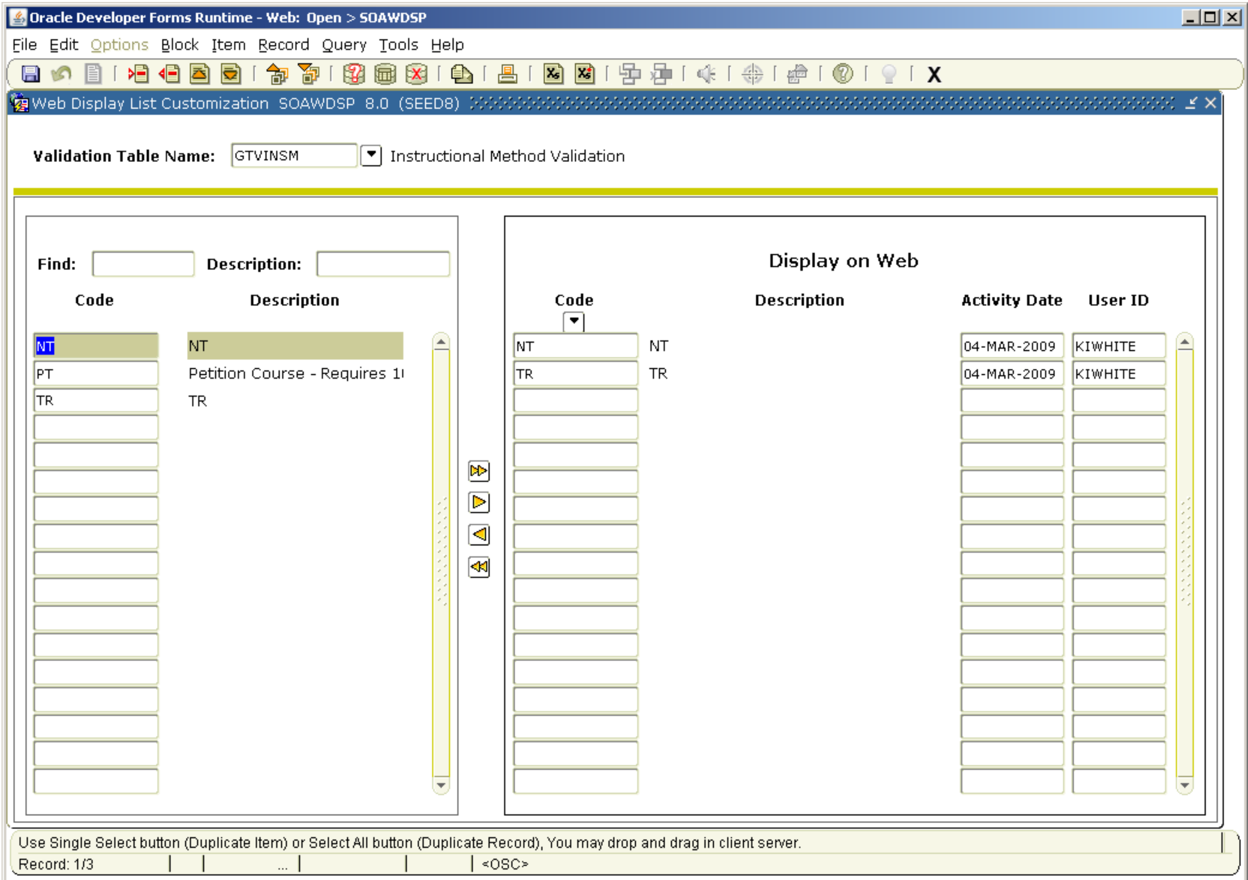


Steps

Follow these steps to select the searchable fields to be displayed on the web.

1. Access the Term Control Form (SOATERM).
2. Enter your term in the **Term** field.
3. Perform a **Next Block** function.
4. Select Web Processing Controls from the **Options** menu.
5. Perform a **Next Block** function.
6. From the **Web Display Controls** section, select desired **Schedule Search Options**:
   - To include schedule types, select the **Search by Schedule Type** checkbox.
   - To include instructional methods, select the **Search by Instructional Method** checkbox.
   - To include campuses, select the **Search by Campus** checkbox.
   - To include course levels, select the **Search by Level** checkbox.
   - To include durations, select the **Search by Duration** checkbox. (applies to Open Learning sections only)
   - To include instructors, select the **Search by Instructor** checkbox.
   - To include sessions, select the **Search by Session** checkbox.
   - To include course attributes, select the **Search by Course Attribute** checkbox.
   - To allow the search and display of long section titles, select the **Display Long Section Title** checkbox.
   - To allow closed sections to be returned on searches, select the **Display Closed Section** checkbox.

Banner form



Oracle Developer Forms Runtime - Web: Open > SOAWDSP
File Edit Options Block Item Record Query Tools Help
Web Display List Customization SOAWDSP 8.0 (SEED8)
Validation Table Name:
GTVINSM
Instructional Method Validation
Find:
Description:
Code
Description
NT
NT
PT
Petition Course - Requires 1
TR
TR
Display on Web
Code
Description
Activity Date
User ID
NT
NT
04-MAR-2009
KIWHITE
TR
TR
04-MAR-2009
KIWHITE
Use Single Select button (Duplicate Item) or Select All button (Duplicate Record), You may drop and drag in client server.
Record: 1/3
<OSC>

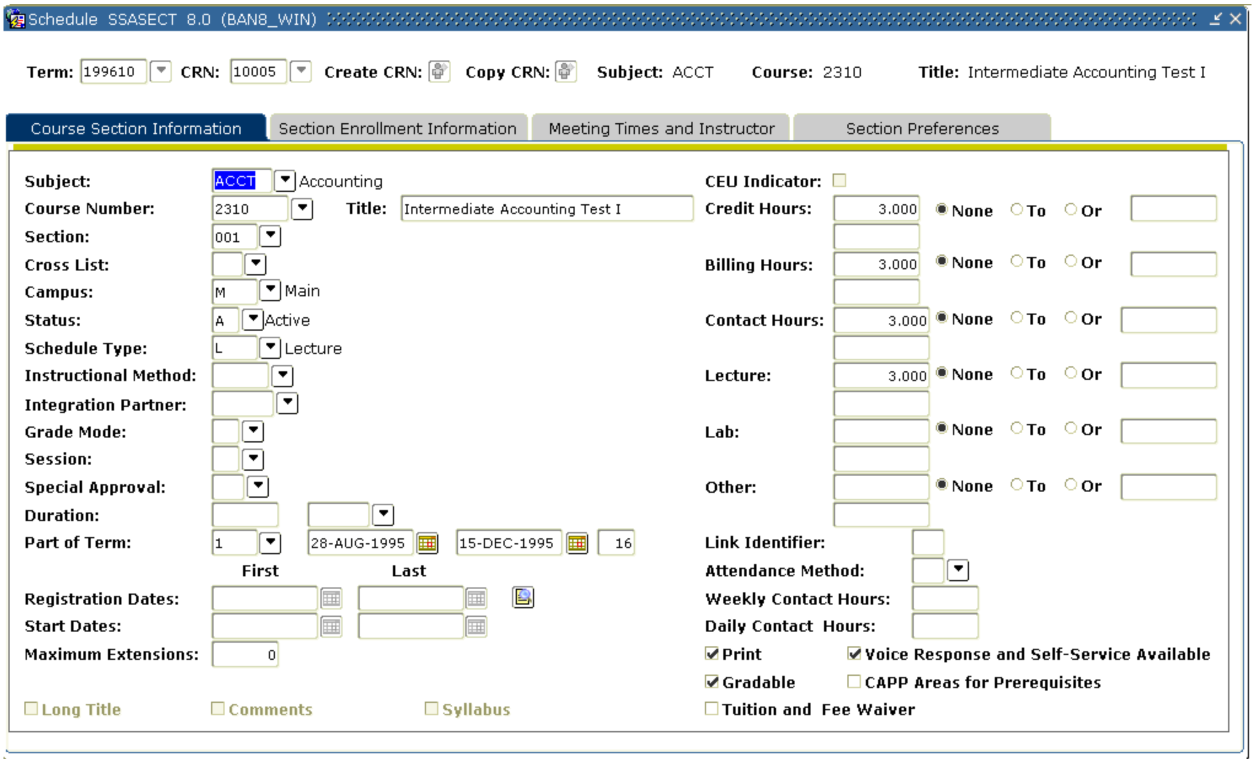
Steps

Follow these steps to specify which validation codes are to be displayed on the Web for the following validation tables:

- Schedule Type Code Validation (STVSCHD)
- Instruction Method Validation (GTVINSM)
- Campus Code Validation (STVCAMP)
- Level Code Validation (STVLEVL)
- Part of Term Code Validation (STVPTRM)
- Session Code Validation (STVSESS)
- Attribute Validation (STVATTR).

1. Access the Web Display List Customization Form (SOAWDSP).
2. Enter the code for the desired validation table. For example, *STVSCHD.*
3. Perform a **Next Block** function.
4. Enter the valid code for the item you wish to display on the Web.
5. Click the **Save** icon.
6. Repeat steps 2-5 for each of the validation tables.

Banner form



Steps

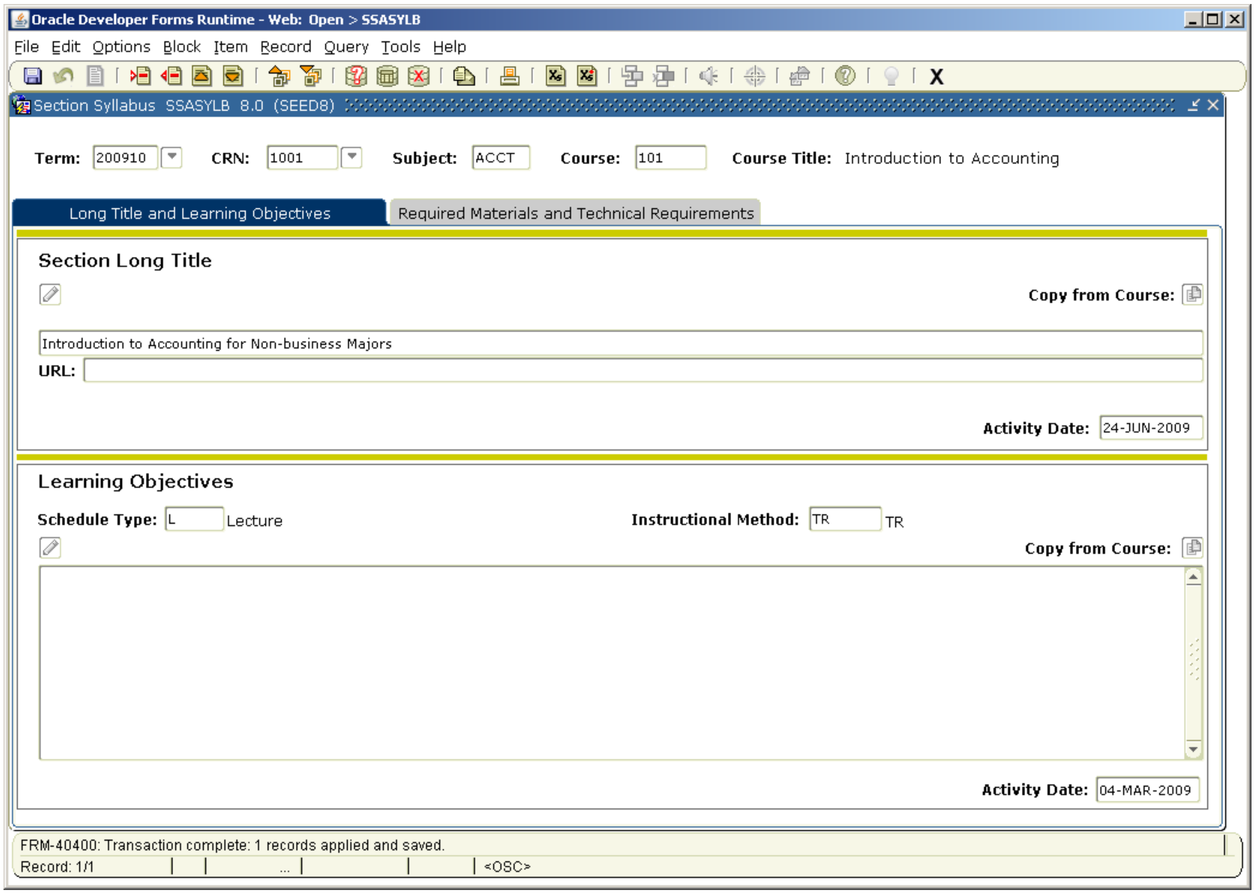
Follow these steps to select a course section to be available on the Web.

1. Access the Schedule Form (SSASECT).
2. Enter your term in the **Term** field.
3. Enter the desired section code in the **CRN** field.
4. Perform a **Next Block** function.
5. Select the **Voice Response and Self-Service Available** checkbox (near the bottom of the form).
6. Click the **Save** icon.
7. Click the **Exit** icon.

Syllabus Information page

The Syllabus page is displayed when a user selects the **Syllabus Available** link on the Class Schedule Listing or Detailed Class Information page. It displays additional information that allows the user to decide whether or not the class meets his or her needs. This page is available only if syllabus information has been defined in the system.

Banner form



Steps

Follow these steps to enter section syllabus information.

1. Access the Section Syllabus Form (SSASYLB).
2. Enter the effective term in the **Term** field.
3. Enter the CRN in the **CRN** field, and tab to populate the **Subject**, **Course**, and **Course Title** fields.

Note: If you select a CRN from SSASECQ, the subject, course, and course title are populated.

4. Perform a **Next Block** function to access the Section Long Title block.

5. Enter the long section title or copy the title from the Catalog module with revision capabilities.

   Note: The **Comments** button opens a Banner Editor window so you can enter, search on, or display text. The **Copy From Course** button is used to copy long course title information that has been established for the course for the effective term.

6. Enter the URL for the section in the **URL** field.

7. Perform a **Next Block** function to access the Learning Objectives block.

8. Enter the learning objectives information.

9. Perform a **Next Block** function or select Required Materials from the **Options** menu to access the Required Materials window.

10. Perform a **Next Block** function or select Technical Requirements from the **Options** menu to access the Technical Requirements window.

11. Click the **Save** icon.

12. Click the **Exit** icon.

Setting up Registration

Introduction

Student Self-Service registration processing allows users to

- add and drop classes
- find classes in the class schedule and subsequently register in them
- change their class options
- view their schedules by day and time or in detail
- view tuition and fee assessment charges associated with class registrations for a selected term
- view registration status.

To access registration functions, the student must enter the secure area of your site.

You may recall that in the Part of Term and Web Registration Controls window of the Term Control Form (SOATERM) you need to enter start and end dates in the Web for Registration block. Students can register for classes using Self-Service for Students only during the timeframes established on SOATERM.

Conditions that prevent registration or add/drop

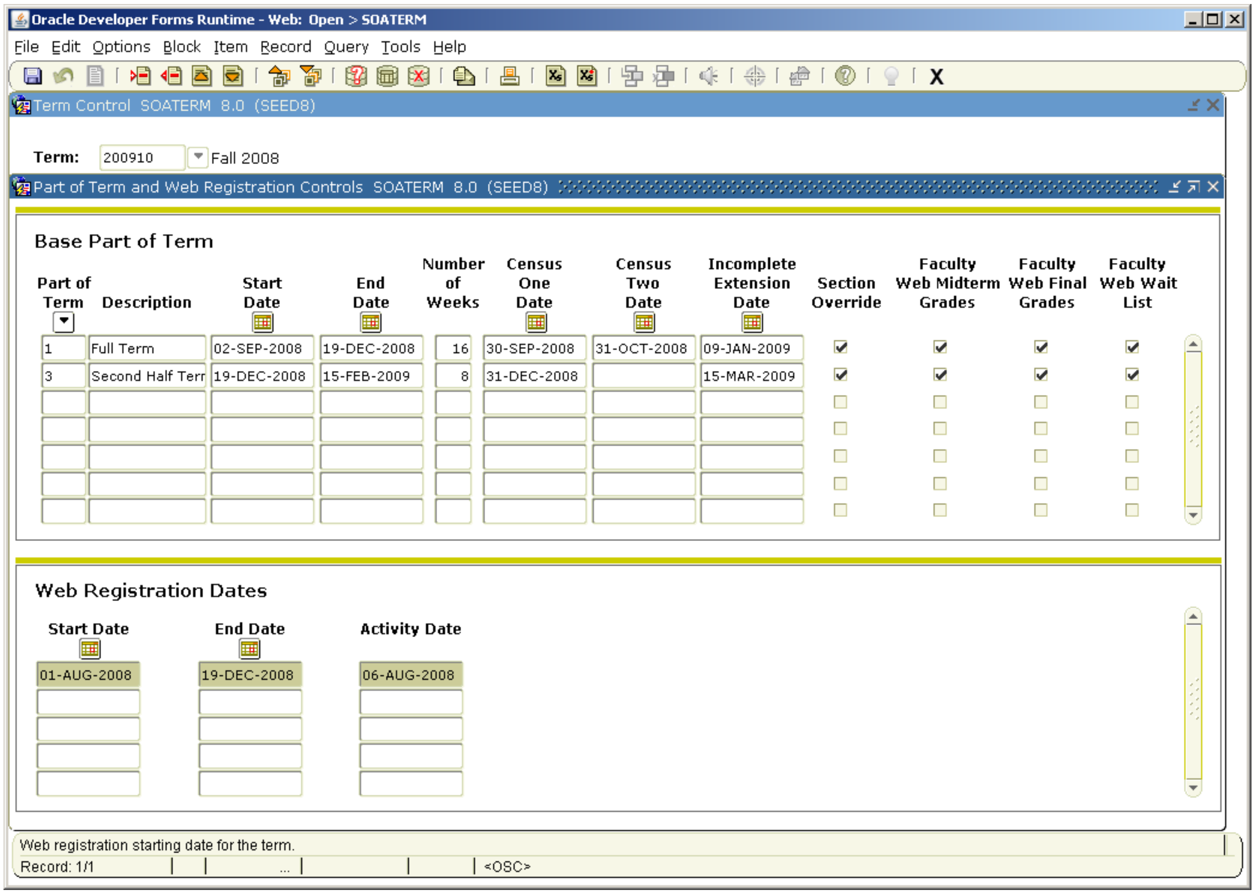
If any of these conditions exist, a student will not be able to register or add/drop.

- Web registration dates prohibit Web registration.
- The student’s enrollment status prohibits registration.
- The student status in the student record in effect for the selected term is inactive.
- The student has an active registration hold.
- The student’s academic standing prohibits registration.
- The student’s time ticketing is not valid for the day and time.
- The registration status date on the Course Registration Status Form (SFARSTS) prohibits registration for all or part of the term.
- The student has not been enrolled since the re-admit term, if specified on SOATERM.
- The student is attempting to drop below the institution’s Minimum Hours requirement for the student.
- The student is attempting to add hours above the institution’s Maximum Hours limit for the student.

Registration Term page

This page is used to select a term for use in registration-related activities. (There are similar pages used in other processing, for example, for the display of the student schedules). If no registration term has been selected for the current Web session and the user requests a registration-related page that requires a term, this page is displayed. Similarly, if a user has been using one term and wants to change to another, he or she can access this page via the Registration Menu to do so. The message *View Only* is displayed after the term if the Web Registration dates for the term exclude the date on which the information is being accessed.

Banner form

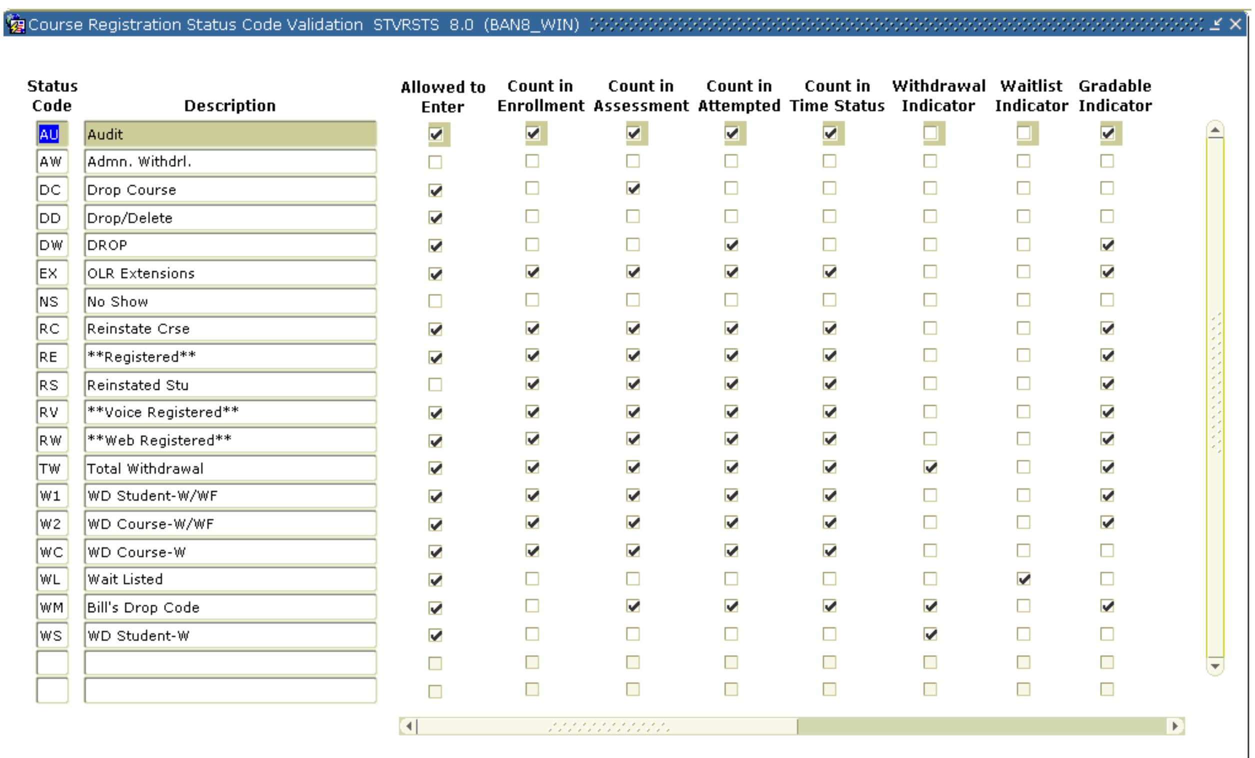


Steps

Follow these steps to web-enable a term for use in registration.

1. Access the Term Control Form (SOATERM).
2. In the **Term** field, enter your term.
3. Perform a **Next Block** function.
4. Check **Permit** checkbox under Registration.
5. Check **Master Web Term Control**.
6. Select Base Part of Term from the **Options** menu.
7. Perform a **Next Block** function.
8. In the Web Registration Dates block of the Part of Term and Web Registration Controls window, enter a date range in the **Start Date** and **End Date** fields.
9. Click the **Save** icon.

Banner form


Course Registration Status Code Validation STVRSTS 8.0 (BAN8_WIN)

Status Code	Description	Allowed to Enter	Count in Enrollment	Count in Assessment	Count in Attempted	Count in Time Status	Withdrawal Indicator	Waitlist Indicator	Gradable Indicator
AU	Audit	☑	☑	☑	☑	☑	☐	☐	☑
AW	Admn. Withdrl.	☐	☐	☐	☐	☐	☐	☐	☐
DC	Drop Course	☑	☐	☑	☐	☐	☐	☐	☐
DD	Drop/Delete	☑	☐	☐	☐	☐	☐	☐	☐
DW	DROP	☑	☐	☐	☑	☐	☐	☐	☑
EX	OLR Extensions	☑	☑	☑	☑	☑	☐	☐	☑
NS	No Show	☐	☐	☐	☐	☐	☐	☐	☐
RC	Reinstate Crse	☑	☑	☑	☑	☑	☐	☐	☑
RE	**Registered**	☑	☑	☑	☑	☑	☐	☐	☑
RS	Reinstated Stu	☐	☑	☑	☑	☑	☐	☐	☑
RV	**Voice Registered**	☑	☑	☑	☑	☑	☐	☐	☑
RW	**Web Registered**	☑	☑	☑	☑	☑	☐	☐	☑
TW	Total Withdrawal	☑	☑	☑	☑	☑	☑	☐	☑
W1	WD Student-W/WF	☑	☑	☑	☑	☑	☐	☐	☑
W2	WD Course-W/WF	☑	☑	☑	☑	☑	☐	☐	☑
WC	WD Course-W	☑	☑	☑	☑	☑	☐	☐	☐
WL	Wait Listed	☑	☐	☐	☐	☐	☐	☑	☐
WM	Bill's Drop Code	☑	☐	☑	☑	☑	☑	☐	☑
WS	WD Student-W	☑	☐	☐	☐	☐	☑	☐	☐
		☐	☐	☐	☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐	☐	☐	☐

Steps

Follow these steps to enter Course statuses.

1. Access the Course Registration Status Code Validation Form (STVRSTS).
2. Select Insert from the **Record** menu.
3. Enter a registration code that indicates registered in the **Status Code** field.
4. Enter a description in the **Description** field.
5. Select the following check boxes:
   - **Allowed to Enter**
   - **Count in Enrollment**
   - **Count in Assessment**
   - **Gradable Indicator**
   - **Print on Schedule**
   - **Web Indicator**

   Note: Do *not* select the **Withdrawal Indicator** or **Waitlist Indicator** checkboxes.
6. Enter the status code type *R* in the **Type** field.
   - *R* Registered (enrolled)
   - *D* Dropped
   - *L* Waitlisted
   - *W* Withdrawn

   Note: If the Type field is left blank, unexpected results can occur.
7. Click the **Save** icon.
8. From the **Record** menu, select *Insert*.
9. Enter a status code that indicates a drop with a 100% refund in the **Status Code** field.
10. Enter a description in the **Description** field.

11. Click the following checkboxes:

- **Allowed to Enter**
- **Web Indicator**

Note: Do *not* select any other checkboxes.

12. Enter the status code type *D* in the **Type** field.

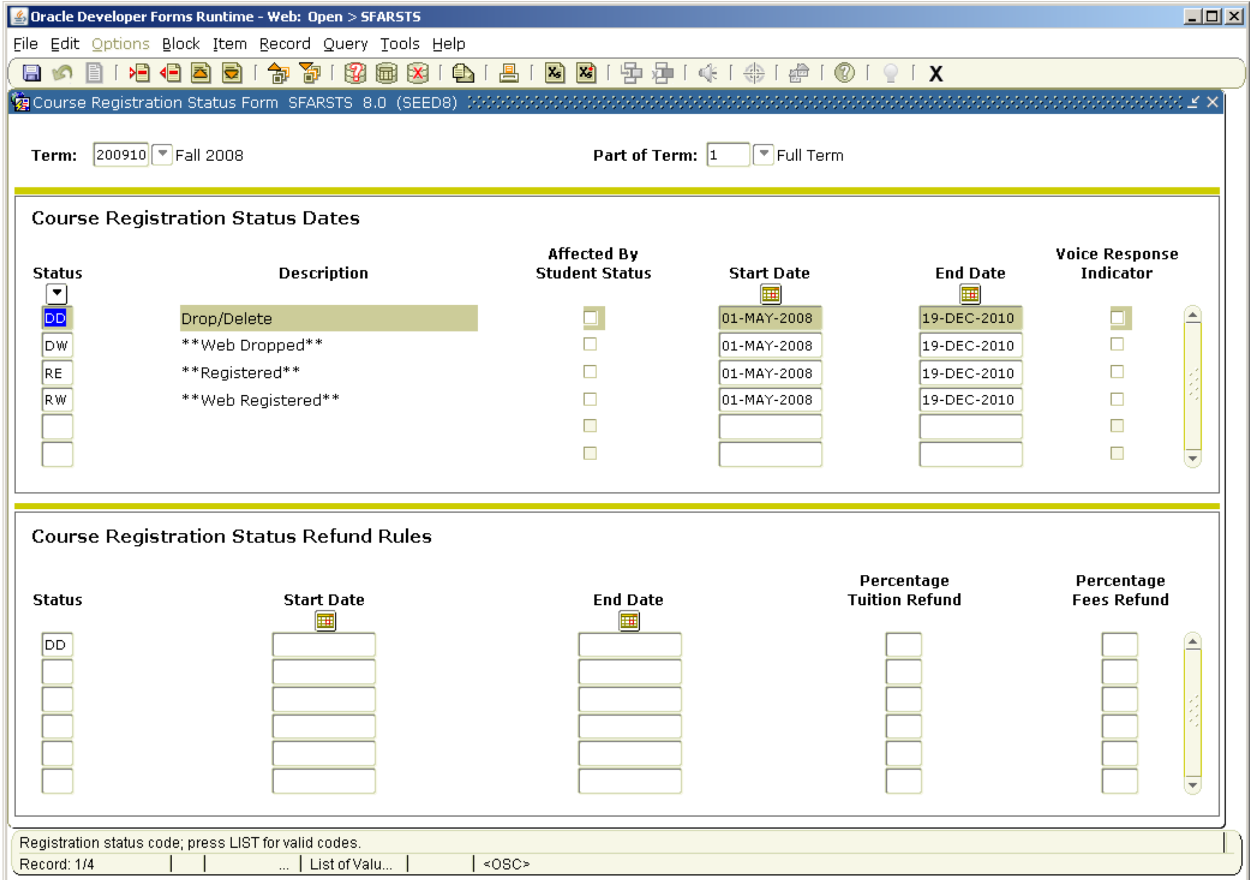
- *R* Registered (enrolled)
- *D* Dropped
- *L* Waitlisted
- *W* Withdrawn

Note: If the **Type** field is left blank, unexpected results can occur.

13. Click the **Save** icon.

Note: In this procedure, you create and Web-enable specific codes to use for Web-based registration and add/drop. You can also use existing codes that were defined for other purposes. For more information, see *Implementing Banner Self-Service for Students.*

Banner form



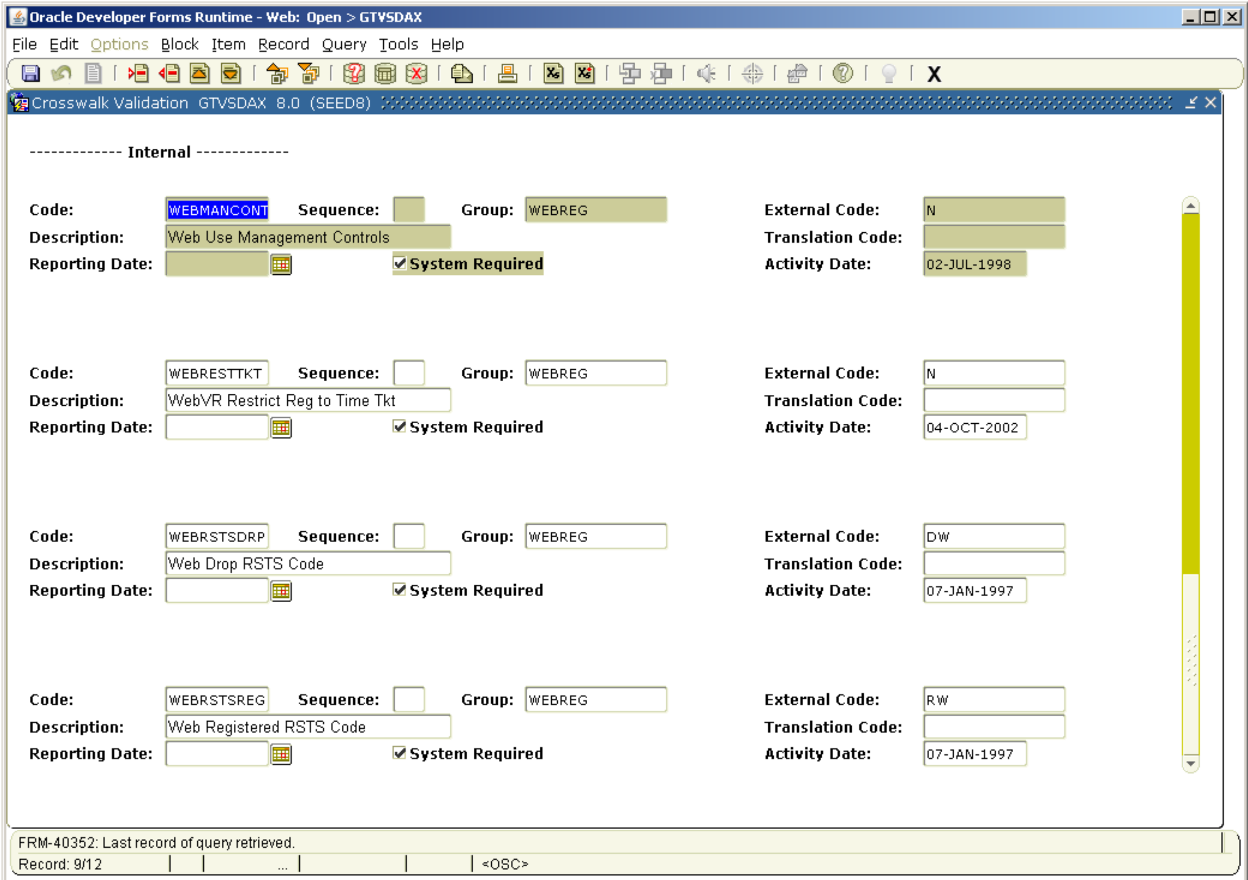
Steps

Follow these steps to assign date ranges to the Web registration status and drop codes.

1. Access the Course Registration Status Form (SFARSTS).
2. Enter your term in the **Term** field.
3. Enter your part of term in the **Part of Term** field.
4. Enter your registration status code in the **Status** field.
5. In the **Start** and **End** fields, enter a date range that corresponds to the Web registration date range you entered for the term in a previous exercise.
6. Click the **Save** icon.
7. Repeat steps 4-6 for your drop code.

8. Click the **Save** icon.

Banner form



Steps

Follow these steps to verify Web registration status and drop codes.

1. Access the Crosswalk Validation Form (GTVSDAX).
2. Click the **Enter Query** icon.
3. Enter *WEBRSTSREG* in the **Internal Code** field.
4. Click the **Execute Query** icon.
5. Verify that the **External Code** is the same registration status code that you defined previously. (If necessary, change this value, then Save).
6. Click the **Enter Query** icon.

7. Enter *WEBRSTSDRP* in the **Internal Code** field.

8. Click the **Execute Query** icon.

9. Verify that the **External Code** is the same drop code that you defined previously. (If necessary, change this value).

10. Click the **Enter Query** icon.

11. Enter *MAXREGNO* in the **Internal Code** field.

12. Click the **Execute Query** icon.

13. Enter the maximum number of enrollment attempts your institution will allow on the web in the **External Code** field.

14. Click the **Save** icon.

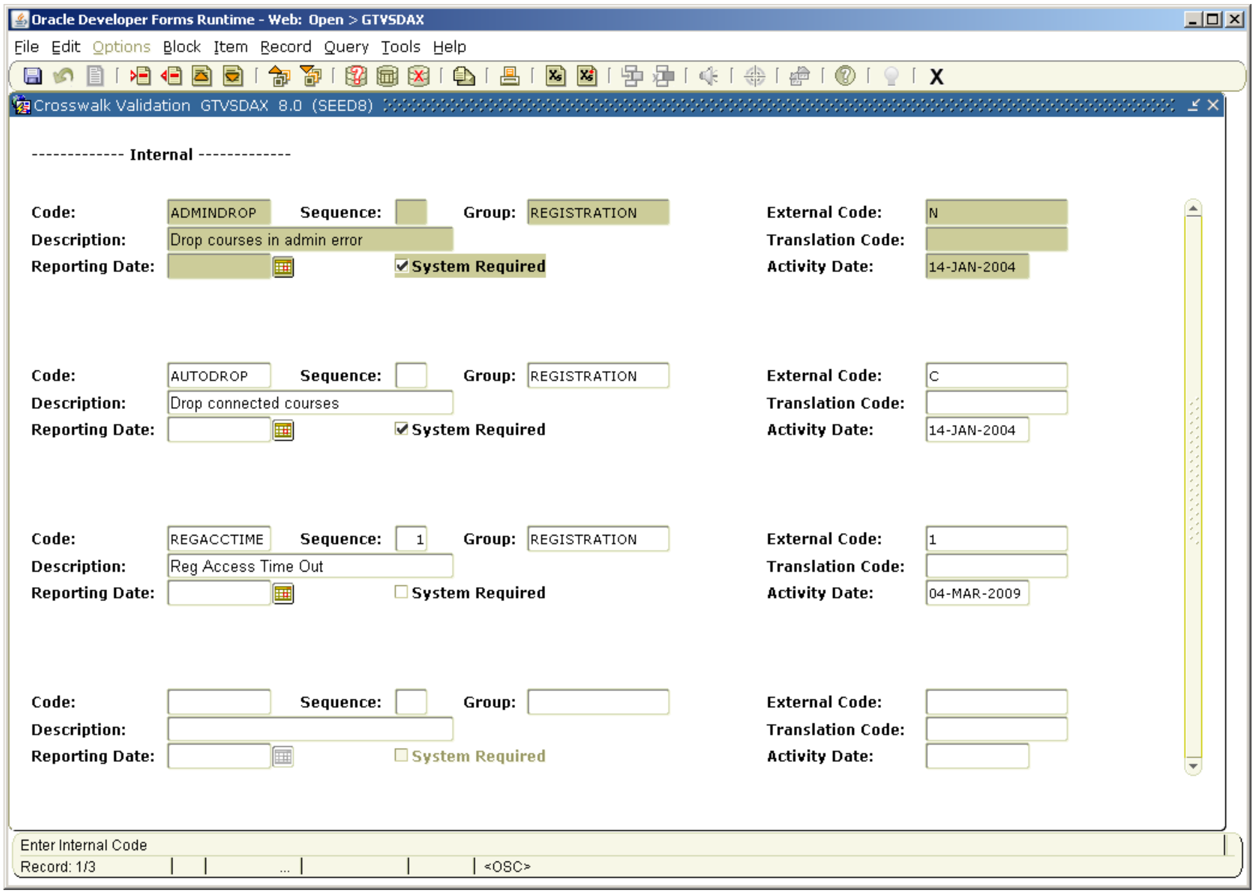
Drop Last Class

The action of a student dropping his or her last class is significant, because it may constitute withdrawal from your institution. Withdrawing from an institution can have implications on financial aid, accounts receivable, etc. Courses cannot be dropped via the Web or Voice Response and refunded at 100% unless the drop meets criteria specified in rules on the Crosswalk Validation Form (GTVSDAX) and has been assigned the appropriate setup code (allowing a course to be dropped and refunded at 100%) on the Course Registration Status Form (SFARSTS) (for traditional courses) or Schedule Processing Rules Form (SSARULE) (for Open Learning courses).

Connected courses are included in this processing.

On GTVSDAX, the *AUTODROP* internal code is used to determine whether connected courses that are in error can be dropped using Self-Service or Voice Response. The *ADMINDROP* internal code is used to drop courses where schedule or restriction changes have occurred *after* enrollment exists or where in-progress prerequisites have failed. These rules are delivered via script.

Banner form



Steps

Follow these steps to allow classes to be dropped. Ensure that the following values are on GTVSDAX. Each step represents one internal code.

1.

Field	Value
Internal Code	AUTODROP
Internal Sequence	(none)
Internal Group	REGISTRATION
External Code	This rule can be set to process the dropping of connected courses in three ways: *C (Confirm)* - Automatic drops are allowed for connected courses, *after* input is received from the student. This is the default value. *Y (Yes)* - Automatic drops are allowed for connected courses. A single, active drop code must exist for all connected courses that would be dropped. No input is needed from the student. *N (No)* - No automatic drops are allowed for connected courses. The student *must* initiate dropping the connected courses. All connected courses must be dropped at the same time. Note: In Voice Response, error checking is performed on each CRN as it is entered. Because of this, if you enter *N* for *AUTODROP*, it will not be possible for connected courses to be dropped. Therefore, it is recommended that you use either *C* or *Y* for *AUTODROP* when using Voice Response systems. If *multiple* drop codes exist or *no* drop codes exist, no connected course drops are allowed to occur.
Description	Drop connected courses.
Activity Date	Sysdate.

2.

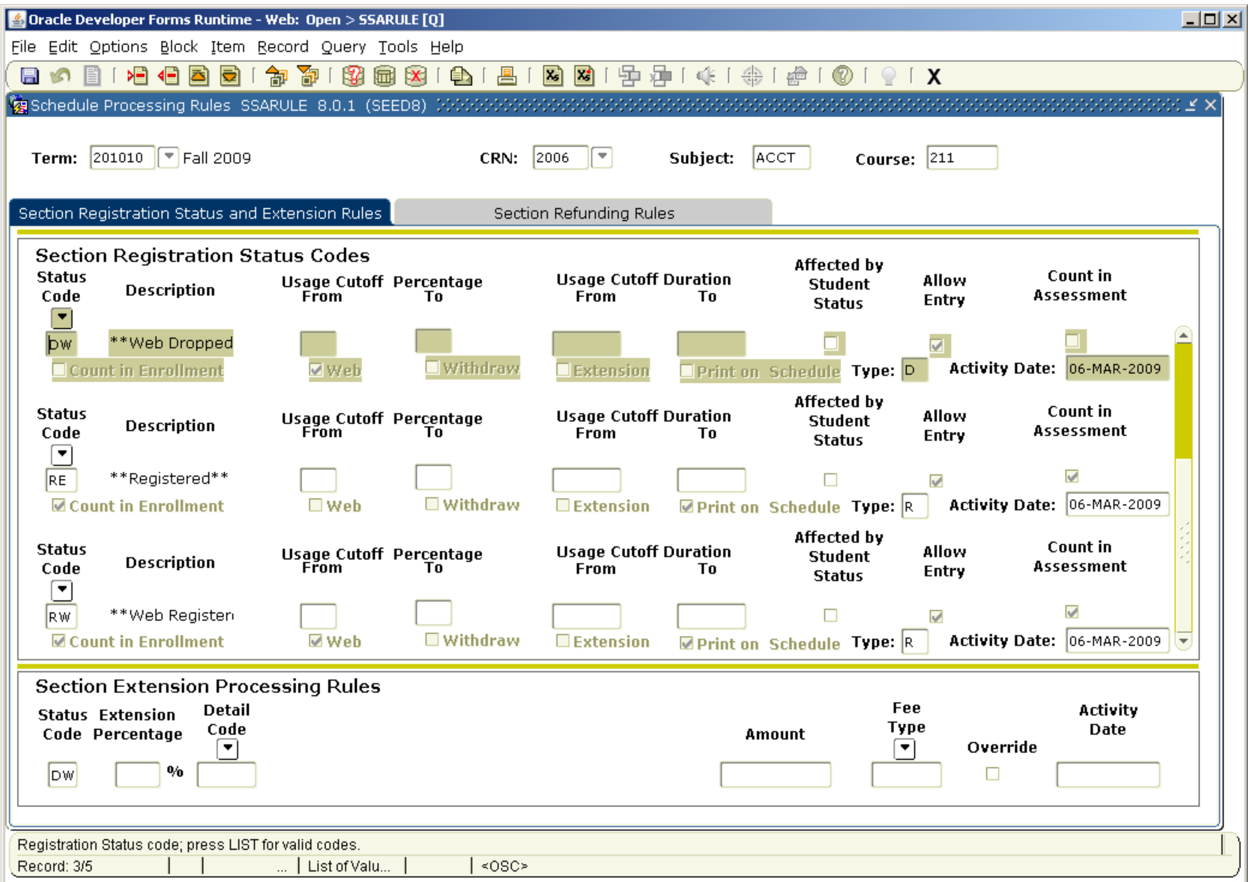
Field	Value
Internal Code	ADMINDROP
Internal Sequence	(none)
Internal Group	REGISTRATION
External Code	This rule can be set to process the dropping of courses in two ways: *Y (Yes)* - Courses with administrative errors are allowed to be dropped if a single, active drop code is available for the section or the part-of-term. This is the default value. *N (No)* - Courses that have administrative errors are not dropped. Run the Registration Admin Messages Report (SFRRGAM) to see errors in the student's schedule. Registration leaves the courses with administrative errors in their registered status on the schedule. You can run the SFRRGAM report to review any errors in the student's schedule regardless of how *ADMINDROP* is set up. See the *Student Release Guide* for more information about this report. The Registration Administrative Message Temporary Table (SFTRGAM) stores the error messages that result from the use of *ADMINDROP* to drop courses during the registration session.
Description	Drop courses in admin error.
Activity Date	Sysdate

3.

Field	Value
Internal Code	WEBDROPLST
Internal Sequence	(none)
Internal Group	WEBREG

Field	Value
External Code	**Y** to allow student to drop last course via the web. **N** to prohibit student from dropping last course via the web.
Description	Web Drop Last Course
Activity Date	Sysdate

Banner form



Steps

Follow these steps to define usage/cutoff rules for web registration and drop codes only for Open Learning sections

1. Access the Schedule Processing Rules Form (SSARULE).

2. Enter your term in the **Term** field.

3. Enter a CRN in the **CRN** field.

   Note: This functionality is only allowed for Open Learning courses.

4. Perform a **Next Block** function.

5. Insert the web registration code in the **Status Code** field.

   Note: If students will be permitted to register for this course through the Self-Service products, the registration status code defined on the WEBRSTSREG record in the Crosswalk Validation Form (GTVSDAX) must also be defined for the section.

6. Define usage/cutoff rules for the web registration status code.

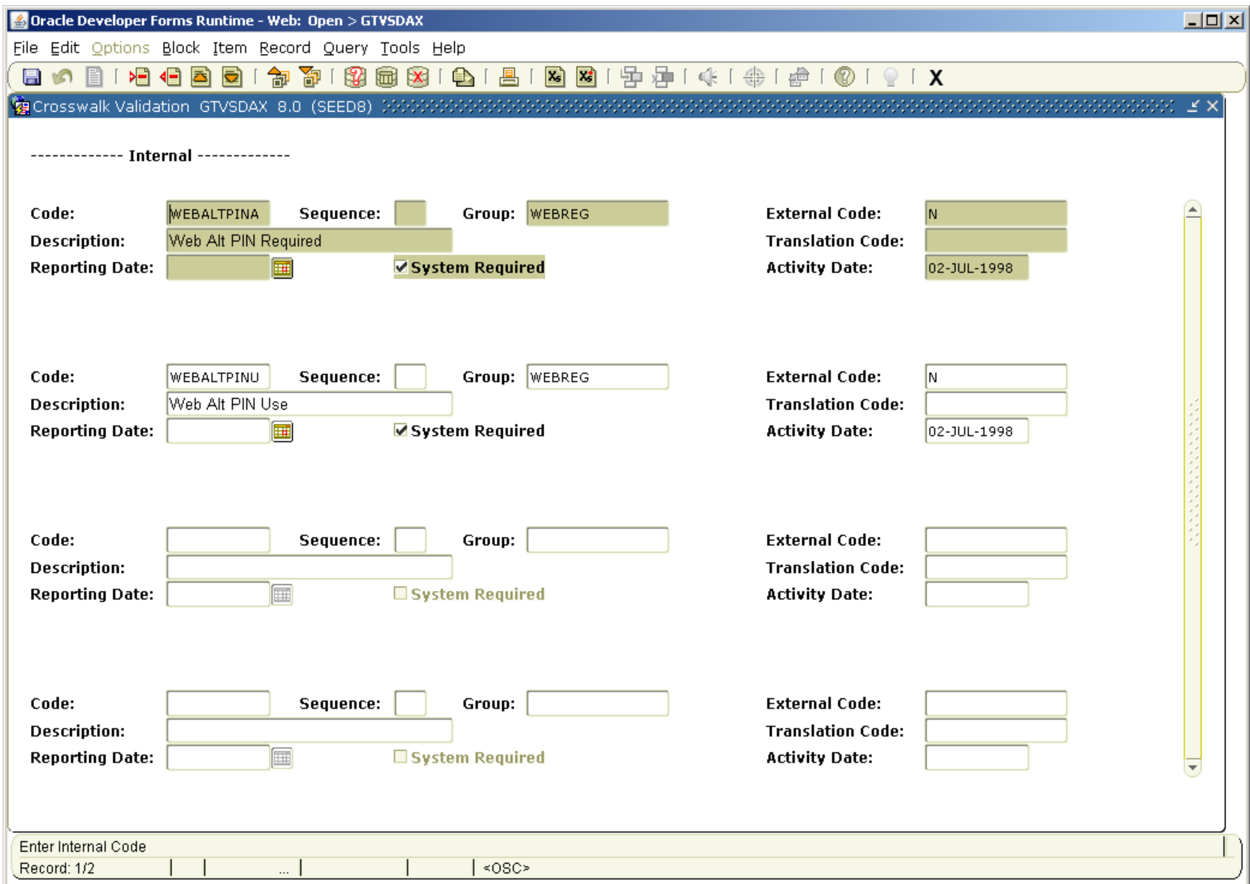
7. Click the **Save** icon.

8. Repeat the process for your Web Drop Code.

Alternate PIN Verification

If your institution has set up alternative PIN processing and an alternative PIN has been entered for the student on the Alternate Personal Identification Number Form (SPAAPIN), this page is displayed when a student tries to perform initial add/drop activity or look up classes for a term. (If no alternative PIN has been entered on SPAAPIN, the system displays the requested page without displaying this page first).

Banner form



Steps

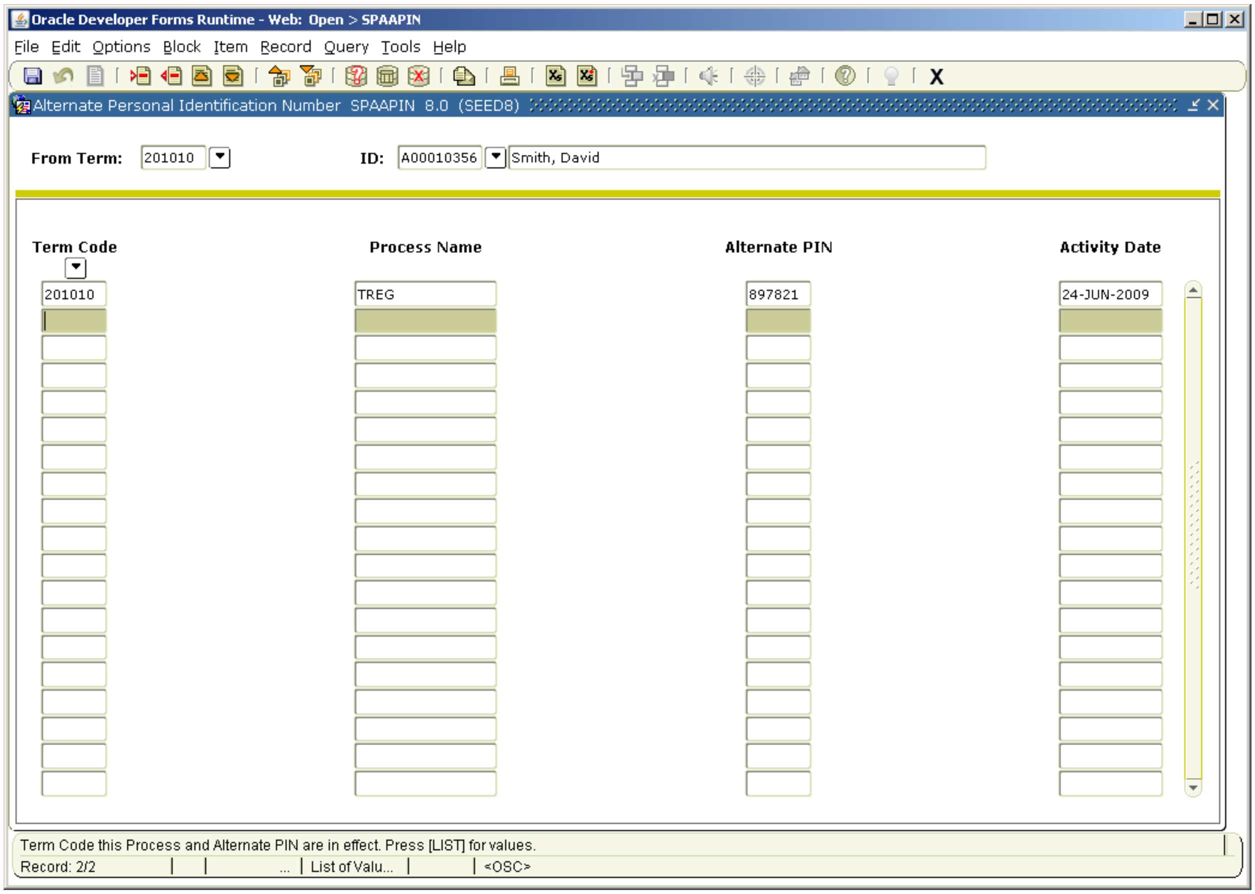
Follow these steps to set up alternate PIN processing.

1. Access the Crosswalk Validation Form (GTVSDAX).

2. Ensure that the following values are entered according to the desired Alternate PIN processing option.

Field	Value
Internal Code	WEBALTPINA
Internal Sequence	(none)
Internal Group	WEBREG
External Code	Y: This will require an alternate PIN for web registration processing. N: This will not require alternate PIN.
Description	Web Alt PIN required
System Required	Checked
Activity Date	Sysdate
Internal Code	WEBALTPINU
Internal Sequence	(None)
Internal Group	WEBREG
External Code	Y: This will turn on Alternate PIN processing. N: This will turn off Alternate PIN processing.
Description	Web Alt PIN Use
System Required	Checked
Activity Date	Sysdate

Banner form



Steps

Follow these steps to define an alternate PIN for the term and the student.

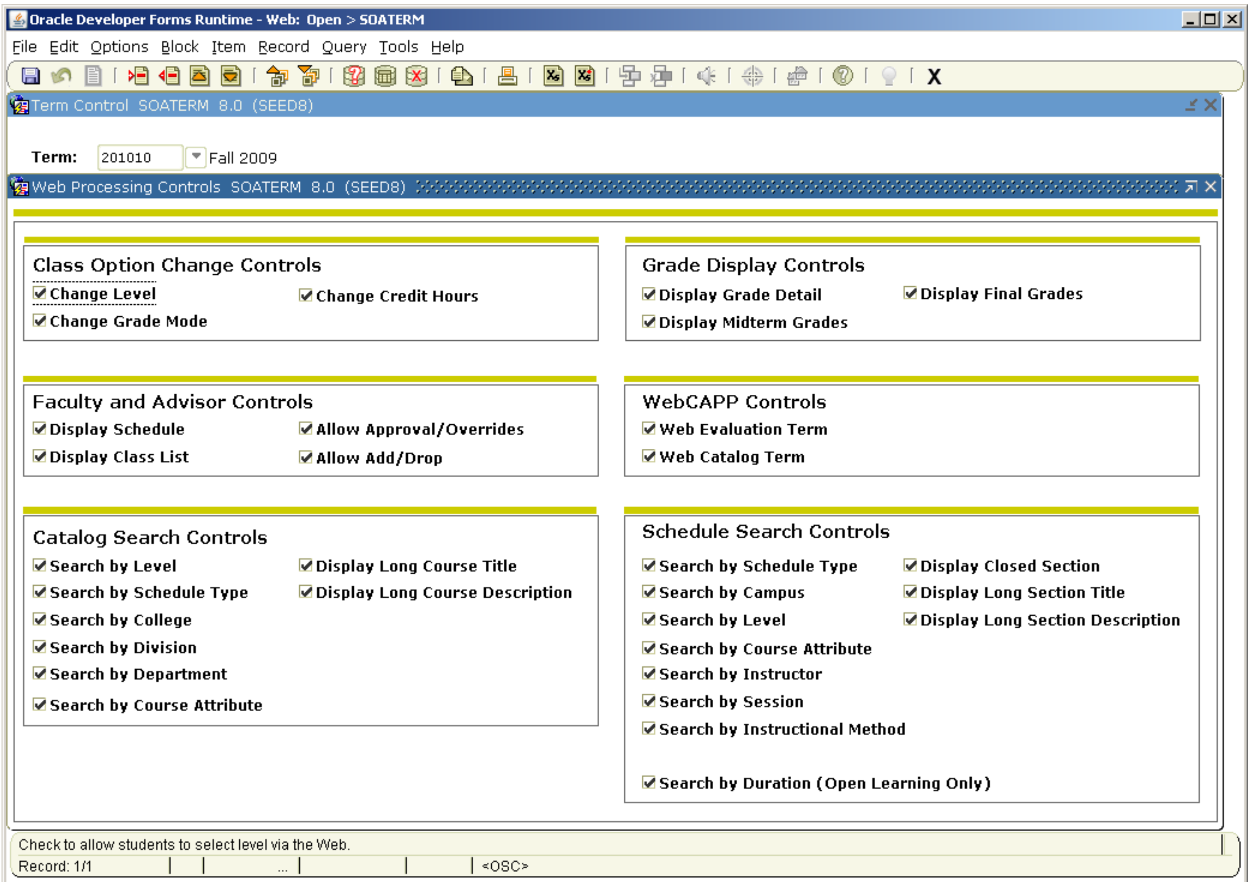
1. Access the Alternate Personal ID Number Form (SPAAPIN).
2. Enter a starting term for the Alternate PIN in the **From Term** field.
3. Enter the student's primary ID.
4. Perform a **Next Block** function.
5. Enter the **Term Code** for which the Alternate PIN is valid.
6. Enter *TREG* in the **Process Name** field.
7. Enter the **Alternate PIN.**
8. Click the **Save** icon.

Change Class Options page

This page is used to change the following options for a course in which the student is already registered:

- Credit hours
- Grade mode
- Course level

Banner form



Steps

Follow these steps to allow class option changes.

1. Access the Term Control Form (SOATERM).
2. Enter your term in the key block.
3. Perform a **Next Block** function.
4. Select **Web Processing Controls** from the **Options** menu.
5. In the Web Processing Controls window, select these check boxes:
    - **Change Level**
    - **Change Grade Mode**
    - **Change Credit Hours (**student must select credit hours within the range defined on SSASECT for the section)**.**
6. Click the **Save** icon.

The student schedule

Students can view their schedules in three ways, *Week at a Glance, Student Detail Schedule*, and a Concise Student Schedule

Students can see a weekly calendar view of all classes they are enrolled in, regardless of term or part of term, on the Week at a Glance page.

To see detailed information that is available about a specific class, students can click the link that appears on the class name. This opens the Student Detail Schedule page.

The Concise Student Schedule page displays the schedule in an easy to print format.

Student Detail Schedule page

This page displays the details of all sections in which a student is currently enrolled for the selected term, as well as any classes for which the student is waitlisted. The display of registered courses on this page is controlled by the **Print On Schedule** checkbox on the Course Registration Status Code Validation Form (STVRSTS). Only courses with statuses for which the **Print On Schedule** checkbox selected are included when the schedule is displayed. It is recommended that statuses for dropped courses should not have the **Print On Schedule** checkbox selected, as listing dropped courses on the schedule may cause confusion.

Waitlisted courses are displayed on this page if the **Show waitlist position on Student Self-Service** checkbox is selected on the Automated Waitlist Term Control Form (SOAWLTC). See the Banner Student Registration Workbook for additional details about the Automated Waitlist Process.

If your institution is using WebCT and you want class titles to be displayed as hyperlinks to the WebCT login page, take the following actions.

- Set the WEBCTINUSE parameter to *Y*.
- Set the CPINUSE parameter to *N*.
- Set the WEBCTLOGIN parameter to the URL for the links' destination.

The URL must be complete, including domain, destination, and port. For example: http://web.sungardhe.com:1234/webct/ticket/ticketLogin.

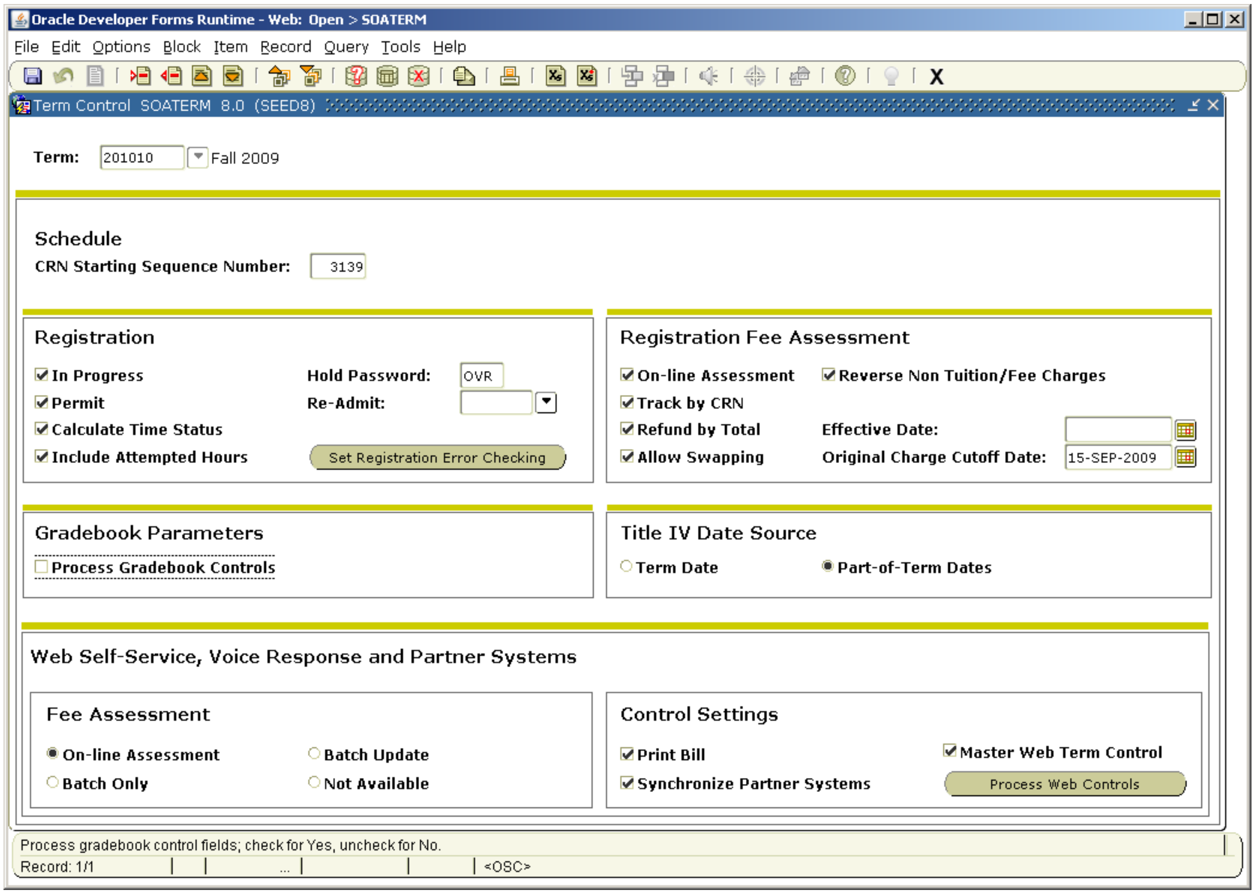
Registration Fee Assessment page

This page calculates and displays a student's registration fee assessment for the selected term if online fee assessment is allowed at the time that the student accesses the page. The Registration Fee Assessment page calculates the student's tuition and fee charges associated with the term selected and displays the charges in summary fashion.

The Registration Fee Assessment page displays only those charges associated with tuition and fees for the selected term. All other account detail is displayed on the Account Summary page (bwskoacc.P_ViewAcctTotal) or Account Summary by Term page (bwskoacc.P_ViewAcct).

You can choose to have detail codes, in addition to the detail code descriptions, included on this page.

Banner form

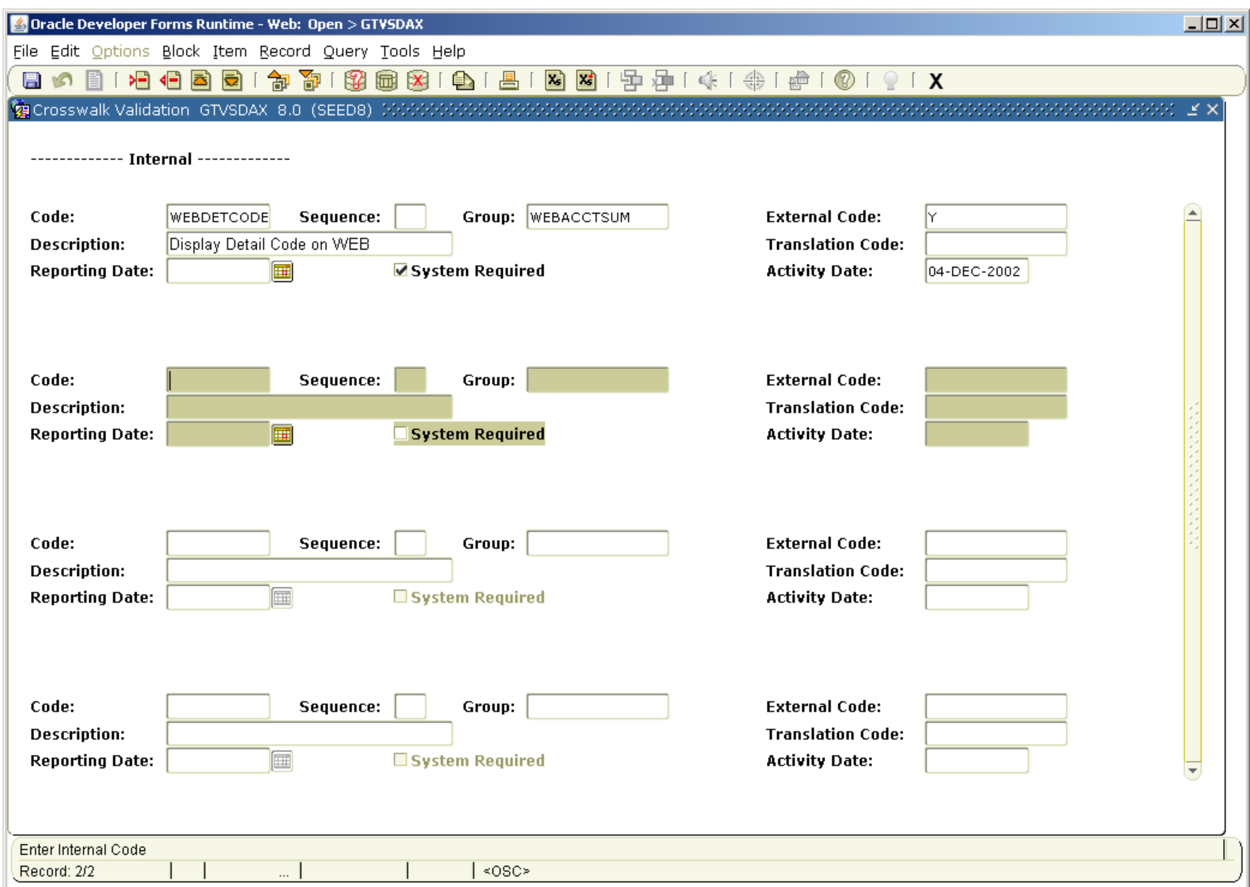


Steps

Follow these steps to allow immediate on-line fee assessment processing.

1. Access the Term Control Form (SOATERM).
2. Enter your term in the **Term** field.
3. Perform a **Next Block** function.
4. Click the **On-Line: Assessment** checkbox under Fee Assessment.
5. Click the **On-Line: Assessment** checkbox under Web Self Service and VR.
6. Click the **Save** icon.

Banner form



Steps

Ensure that these values are on GTVSDAX in order to display detail codes on the Web.

Field	Value
Internal Code	WEBDETCODE
Internal Sequence	(none)
Internal Group	WEBACCTSUM
External Code	Y
Translation Code	(blank)
Description	Display Detail Code on Web
Activity Date	Sysdate

Withdrawal Information page

On the Withdrawal Information page, the student can see information regarding his or her withdrawal from the institution, including information about how his or her ending balance was calculated and the amount of financial aid that must be returned.

Banner calculates this value based on the withdrawal information entered on the Student Withdrawal Form (SFAWDRL). It cannot be changed.

When a student withdraws, he or she can also see information about his or her Title IV funding, including the amounts disbursed, earned, and unearned for each Title IV fund he or she was eligible to receive for that term.

The Return of Title IV Funds Calculated Form (RPATIVC) is used to calculate a student's **current** Title IV repayment. To view all of the repayment calculations for a student, use the Return of Title IV Funds Inquiry Form (RPITIVC).

Although this page is part of the Financial Aid module, it can be accessed only from the Registration menu.

Fields are displayed on this page only if the student has withdrawn from your institution in the selected term. If there is no withdrawal information for the student for the selected term, the message *You are not being processed for withdrawal for the selected term* is displayed.

Withdrawal Information page – setup requirements

In Web Tailor, review the text for the following items for clarity and any information and/or instructions you want to provide to your students:

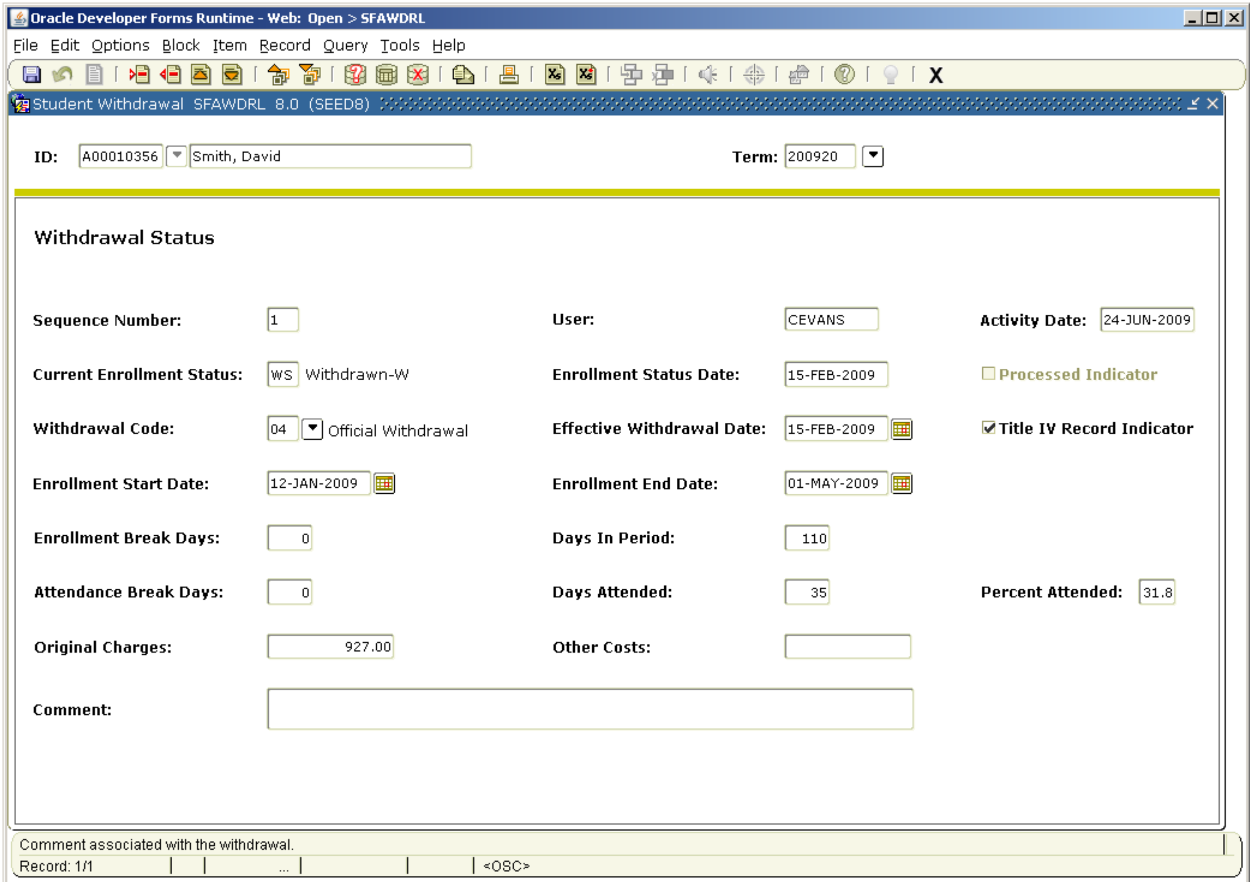
- **DEFAULT, Sequence 1**
  The DEFAULT Information Text is displayed at the top of the Withdrawal Information page.

- **NOT_WITHDRAWN, Sequence 1**
  The NOT_WITHDRAWN Information Text is displayed after the DEFAULT Information Text when a person has no withdrawal records (SFRWDRL) for the selected term. It tells the student that he or she is not being processed as a withdrawn student for the term.

- **NOTIFICATION, Sequence 1**
  The NOTIFICATION Information Text is displayed at the end of the Withdrawal Information section and before the Title IV Aid to be Returned section. It tells the student that he or she is not being processed as a withdrawn student for the selected term.

  Use the WebTailor **Information Text** option to update the text, if desired.

Banner form



Steps

Follow these steps to withdraw a student.

1. Access the Student Withdrawal Form (SFAWDRL).
2. Enter a student's Banner ID in the **ID** field.

   Note: Make sure you enter an ID other than the one you have been using in previous exercises.
3. Enter your term in the **Term** field.
4. Perform a **Next Block** function.
5. Enter a withdrawal code in the **Withdrawal Code** field.
6. Enter today's date in the **Effective Withdrawal Date** field.

7. Click the **Save** icon.

   Note: The student's enrollment status code will be updated to the code on the Enrollment Status Code Validation Form (STVESTS) that is assigned the withdrawal code you just used.

Title IV Fund Detail page

This page displays information about each Title IV fund the student was eligible to receive for the selected term. Although this page is part of the Financial Aid module, it can be accessed only from the Withdrawal Information page (bwrktivw.P_TitleIVWithdraw).

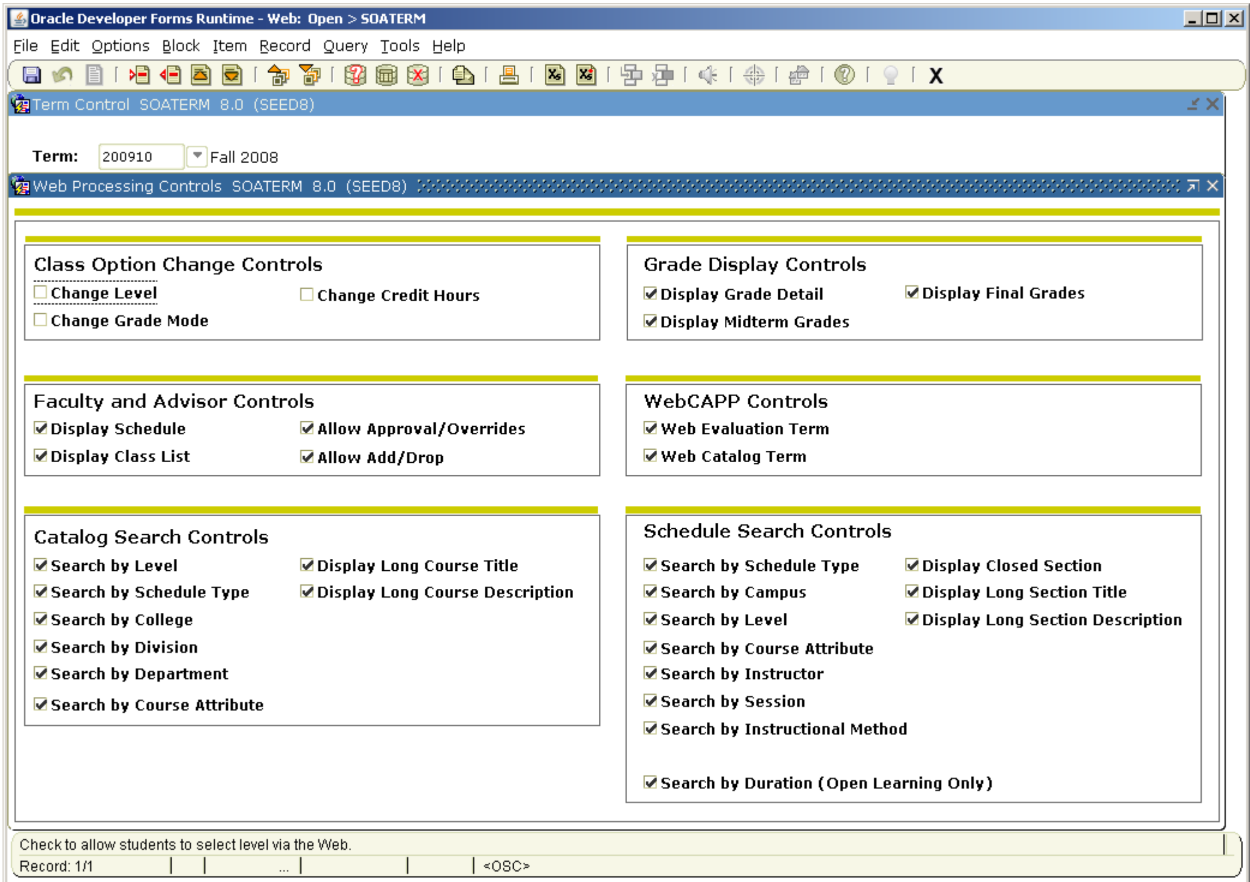
Set-up Requirements

In Web Tailor, review the text for the following item for clarity and any information and/or instructions you want to provide to your students:

- **NOTE, Sequence 1**
  The NOTE Information Text is displayed after the Title IV Fund Detail section of the page. It can be used to provide information that clarifies the contents of the Title IV Fund detail information. As delivered, it states that the Federal Work Study totals displayed indicate eligibility rather than the amount actually earned.

  Use the WebTailor **Information Text** option to update the text, if desired.

Banner form



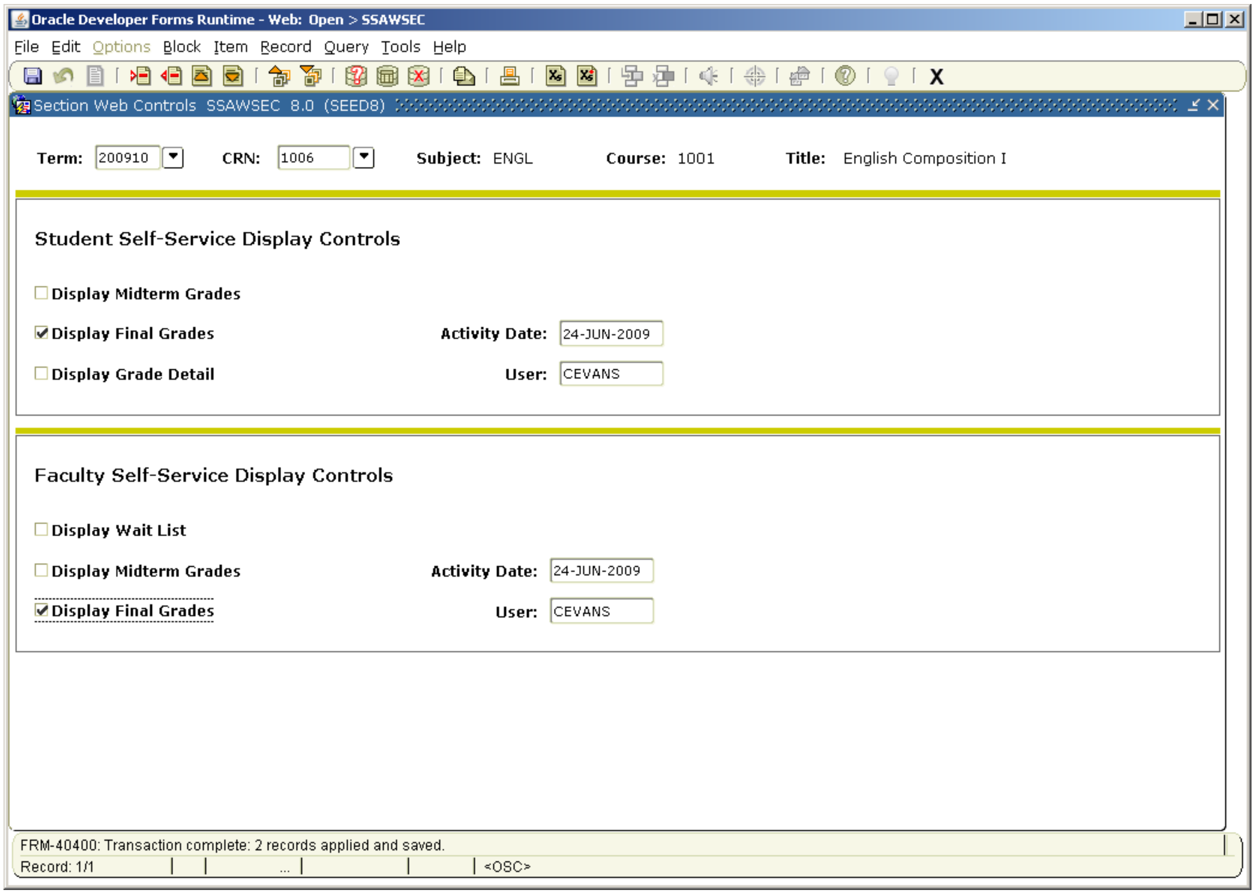
Oracle Developer Forms Runtime - Web: Open > SOATERM
File Edit Options Block Item Record Query Tools Help
Term Control SOATERM 8.0 (SEED8)
Term: 200910 Fall 2008
Web Processing Controls SOATERM 8.0 (SEED8)
Class Option Change Controls
Change Level
Change Credit Hours
Change Grade Mode
Grade Display Controls
Display Grade Detail
Display Final Grades
Display Midterm Grades
Faculty and Advisor Controls
Display Schedule
Allow Approval/Overrides
Display Class List
Allow Add/Drop
WebCAPP Controls
Web Evaluation Term
Web Catalog Term
Catalog Search Controls
Search by Level
Display Long Course Title
Search by Schedule Type
Display Long Course Description
Search by College
Search by Division
Search by Department
Search by Course Attribute
Schedule Search Controls
Search by Schedule Type
Display Closed Section
Search by Campus
Display Long Section Title
Search by Level
Display Long Section Description
Search by Course Attribute
Search by Instructor
Search by Session
Search by Instructional Method
Search by Duration (Open Learning Only)
Check to allow students to select level via the Web.
Record: 1/1
<OSC>

Steps

Follow these steps to select grade display options.

1. Access the Term Control Form (SOATERM).
2. Enter your term in the **Term** field.
3. Perform a **Next Block** function.
4. Select **Web Processing Controls** from the **Options** Menu.
5. Select the desired **Grade Display** options.
6. Click the **Save** icon.

Banner form



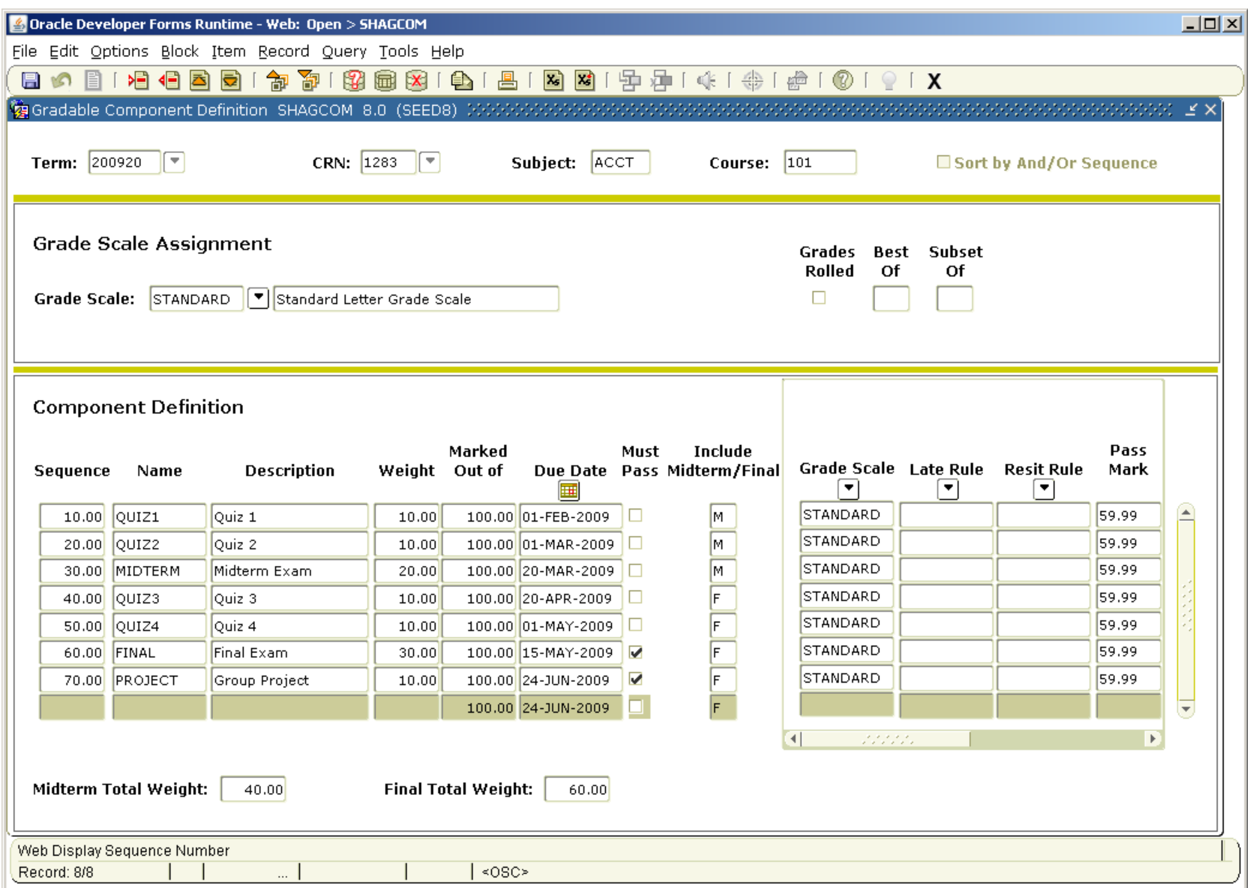
Steps

Follow these steps to display grades on the web for a specific class.

Note: For a specific class, if desired, select or clear the **Display Midterm Grades** checkbox as appropriate to override the setting in SOATERM.

1. Access the Section Web Controls Form (SSAWSEC).
2. Enter your term in the **Term** field.
3. Enter the CRN for the course in the **CRN** field.
4. Perform a **Next Block** function.
5. Select the desired display items from the **Student Self-Service Display Controls** block.
6. Click the **Save** icon.

Banner form



Steps

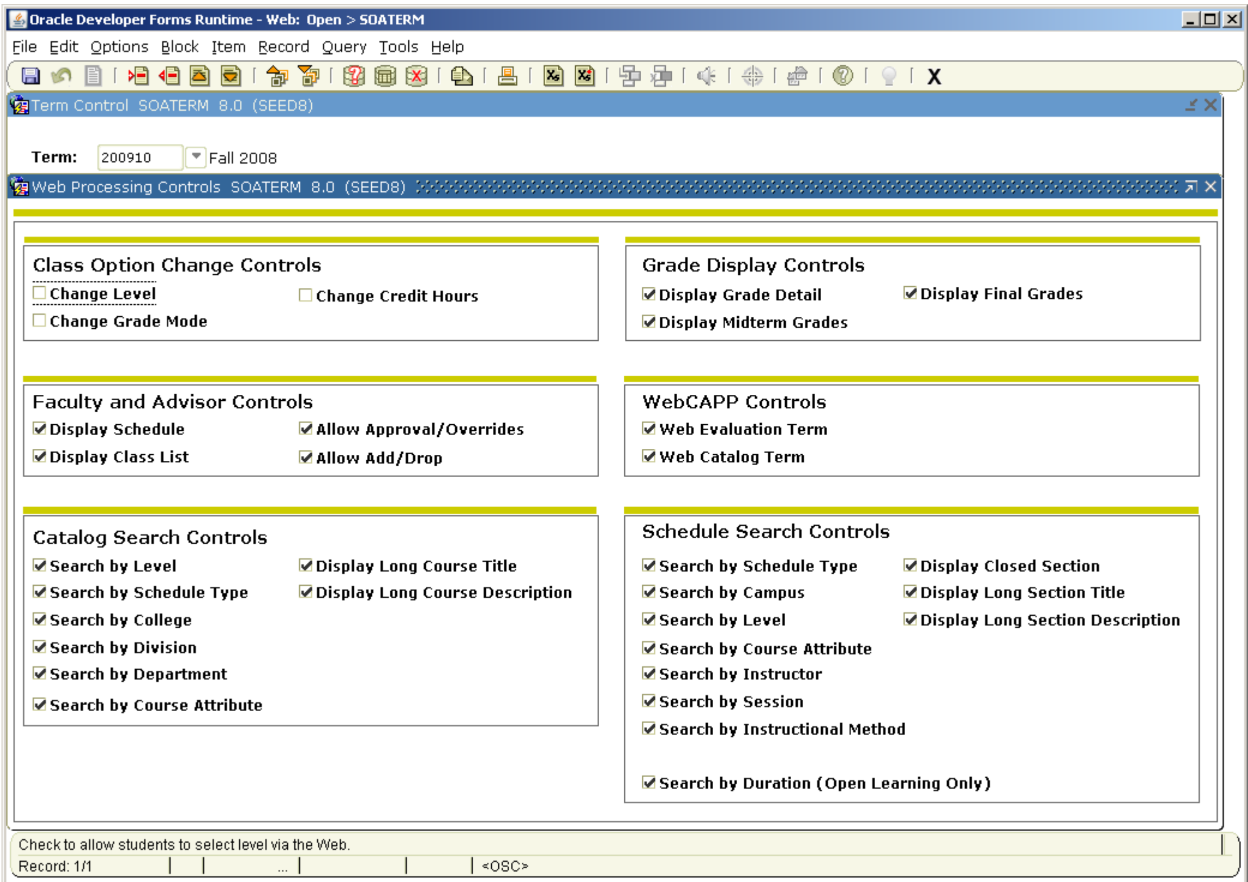
Follow these steps to define grade detail for a class to display the word *Available* via the Active Registrations page.

1. Access the Gradable Component Definition Form (SHAGCOM).
2. Enter your term in the **Term** field.
3. Enter your **CRN**.
4. Perform a **Next Block** function.
5. Enter a Grade Scale code in the **Grade Scale** field.
6. Perform a **Next Block** function.
7. Enter desired component definitions in the Component Definitions area.
8. Click the **Save** icon.

Registration History page

This page displays all of the user's registration activity, regardless of status or term. Since there is no term requirement, registration information displayed may cross various terms. Therefore, the information is presented by course within term.

Banner form

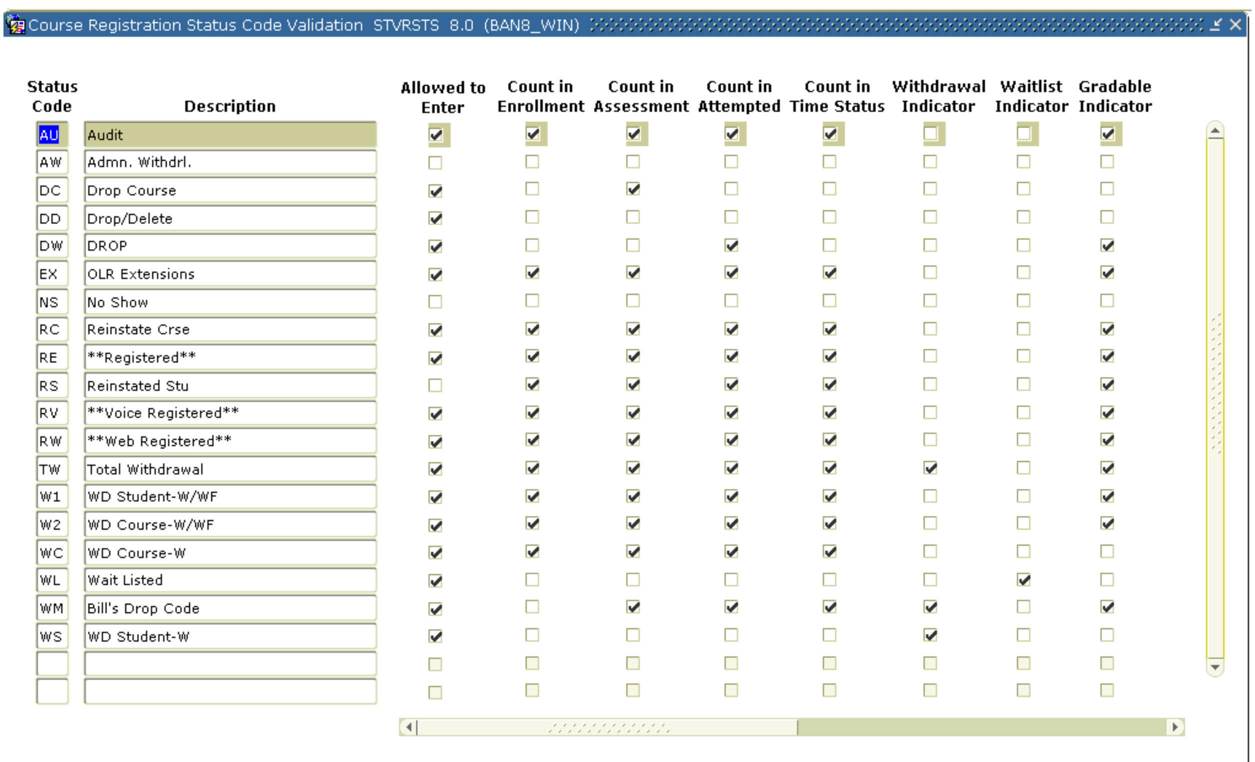


Steps

Follow these steps to Web-enable grade display.

1. Access the Term Control Form (SOATERM).
2. Enter your term in the **Term** field.
3. Perform a **Next Block** function.
4. Select **Web Processing Controls** from the **Options** menu.
5. In the Grade Display Controls section of the Web Processing Controls window, click the **Display Grade Detail**, **Display Midterm Grades**, and **Display Final Grade** checkboxes.
6. Click the **Save** icon.

Banner form


Course Registration Status Code Validation STVRSTS 8.0 (BAN8_WIN)

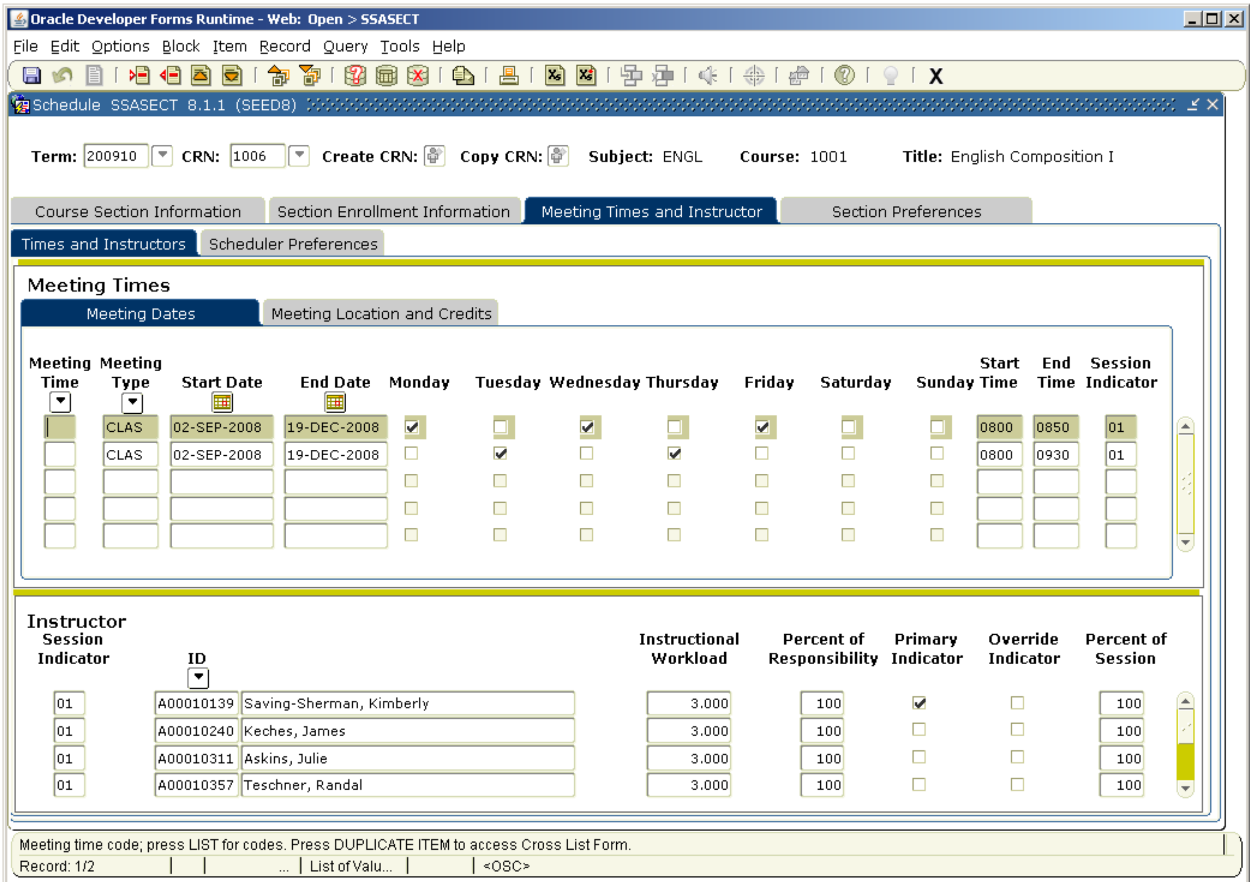
Status Code	Description	Allowed to Enter	Count in Enrollment	Count in Assessment	Count in Attempted	Count in Time Status	Withdrawal Indicator	Waitlist Indicator	Gradable Indicator
AU	Audit	✔	✔	✔	✔	✔			✔
AW	Admn. Withdrl.								
DC	Drop Course	✔		✔					
DD	Drop/Delete	✔							
DW	DROP	✔			✔				✔
EX	OLR Extensions	✔	✔	✔	✔	✔			✔
NS	No Show								
RC	Reinstate Crse	✔	✔	✔	✔	✔			✔
RE	**Registered**	✔	✔	✔	✔	✔			✔
RS	Reinstated Stu		✔	✔	✔	✔			✔
RV	**Voice Registered**	✔	✔	✔	✔	✔			✔
RW	**Web Registered**	✔	✔	✔	✔	✔			✔
TW	Total Withdrawal	✔	✔	✔	✔	✔	✔		✔
W1	WD Student-W/WF	✔	✔	✔	✔	✔			✔
W2	WD Course-W/WF	✔	✔	✔	✔	✔			✔
WC	WD Course-W	✔	✔	✔	✔	✔			
WL	Wait Listed	✔						✔	
WM	Bill's Drop Code	✔		✔	✔	✔	✔		✔
WS	WD Student-W	✔					✔		

Steps

Follow these steps to web-enable course statuses for display on the schedule views.

1. Access the Course Registration Status Code Validation Form (STVRSTS).
2. Find the appropriate course registration status code.
3. Review the **Print on Schedule** checkbox.
    - *Selected*: The course registration status will appear in the Student Schedule pages
    - *Cleared*: The course registration status will not appear in the Student Schedule pages.
4. If necessary, click the **Print on Schedule** checkbox.
5. Click the **Save** icon.

Banner form



Steps

Follow these steps to review the start and end dates for the class.

1. Access the Schedule Form (SSASECT).
2. Enter your term in the **Term** field.
3. Enter your CRN in the **CRN** field.

   Note: Press Tab to move to this field.
4. Perform a **Next Block** function.
5. Select Scheduled Meeting Times from the **Options** menu.
6. In the Meeting Time window, look at the start and end dates for this class. Does this class have a date range that does not include today?

7. Repeat for the remaining classes.

Fee assessment

Students can use Self-Service for Students to see the fees currently assessed for them in Banner.

Online fee assessment needs to be Web-enabled for specific terms on the Term Control Form (SOATERM). When this is done, the Registration Fee Assessment page calculates and displays a student's registration fee assessment for that term.

If fee assessment is not Web-enabled, the student sees this message: *Fee assessment calculations are not being performed at this time*.

If fee assessment is Web-enabled, but fee assessment rules have not been defined for the term on the Registration Fees Process Control Form (SFARGFE) or have been defined but do not apply to the student, the student sees this message: *You are currently enrolled. However, no registration-related fees are due*.

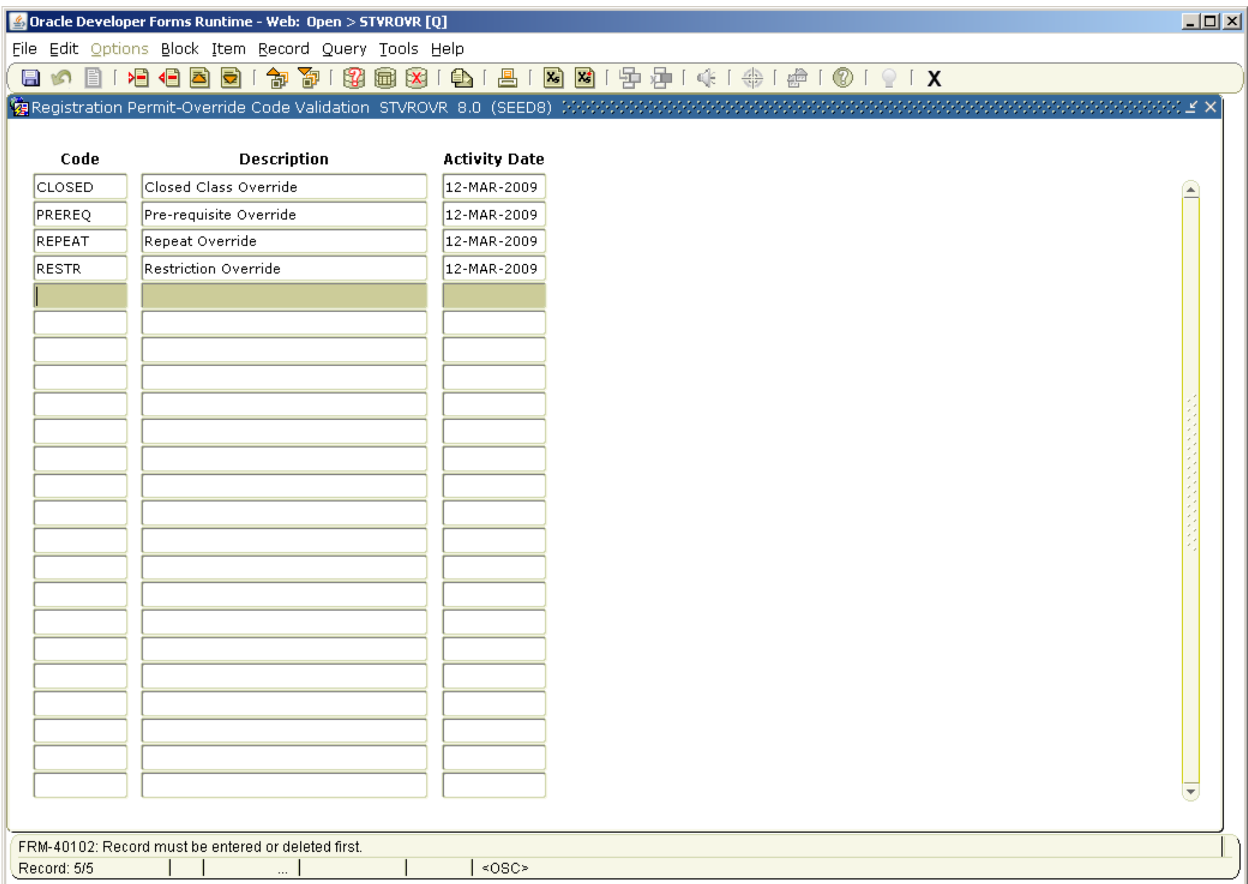
Registration permit/overrides

You can optionally establish combinations of allowable automatic overrides for registration processing and assign them to individual students.

Permit-overrides are available by term on a course or individual section basis.

Permit-overrides bypass the error checking that would normally be performed in the Student Course Registration Form (SFAREGS) and Banner Self-Service for Students Registration, if the corresponding term controls on the Term Control Form (SOATERM) were flagged as either *Warning* or *Fatal*.

Banner form



Steps

Follow these steps to create and define a permit/override code.

1. Access the Registration Permit-Override Code Validation Form (STVROVR).
2. Enter an override code in the **Code** field (maximum10 characters). You will select this code when you define the override in the next step.
3. Enter a description for the override code in the **Description** field.
4. Click the **Save** icon.

Registration Errors for Permit Overrides

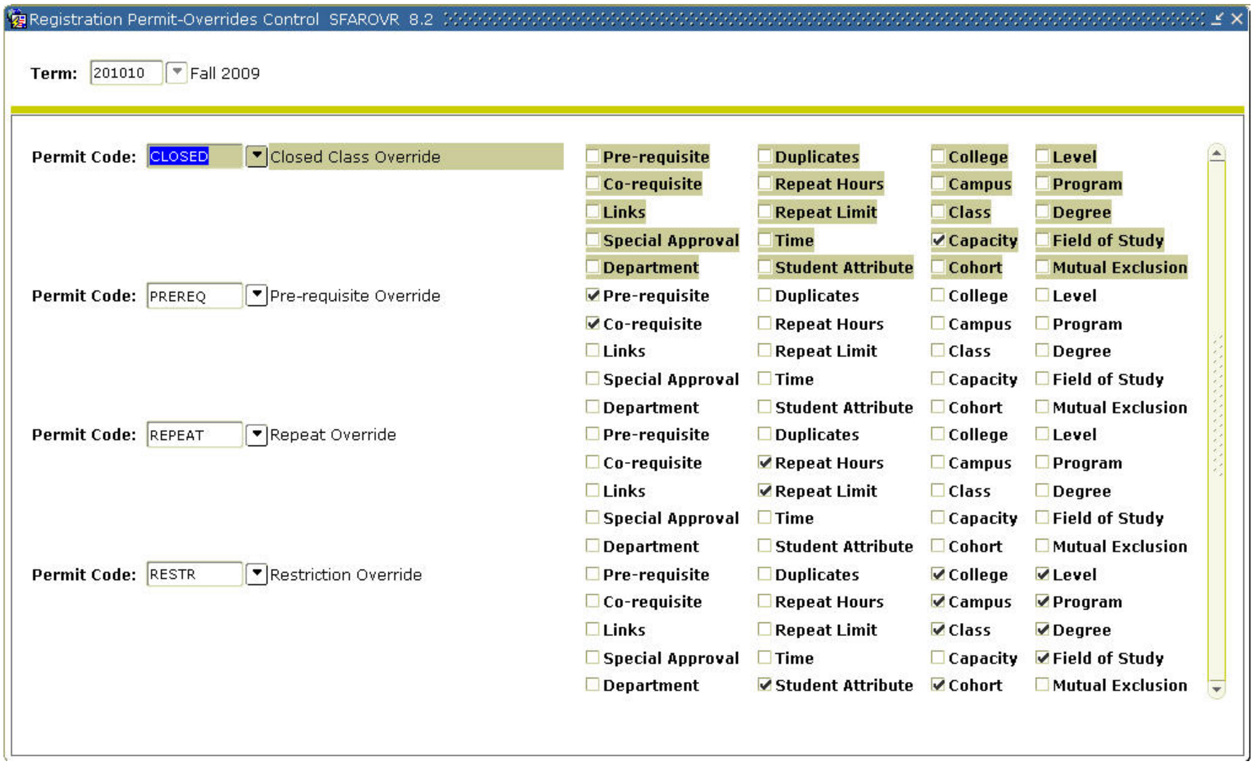
Registration errors for permit-overrides

You can designate these registration errors for permit-overrides.

- Capacity Permit
- Duplicate Override
- Course Link Override
- Co requisite Override
- Prerequisite and Test Score Override
- Time Conflict Override
- Special Approval Override
- Field of Study Restriction Override
- College Restriction Override
- Level Restriction Override
- Class Restriction Override
- Campus Restriction Override
- Repeat Hours Override
- Repeat Limit Override
- Degree Override
- Program Override
- Department Restriction Override
- Student Attribute Restriction Override
- Cohort Restriction Override
- Mutually Exclusive Courses Override

Note: For more detailed information about the above registration error checking categories, please refer to the following chapters in Using Banner Student: Catalog Module, Schedule Module, and Registration Module.

Banner form



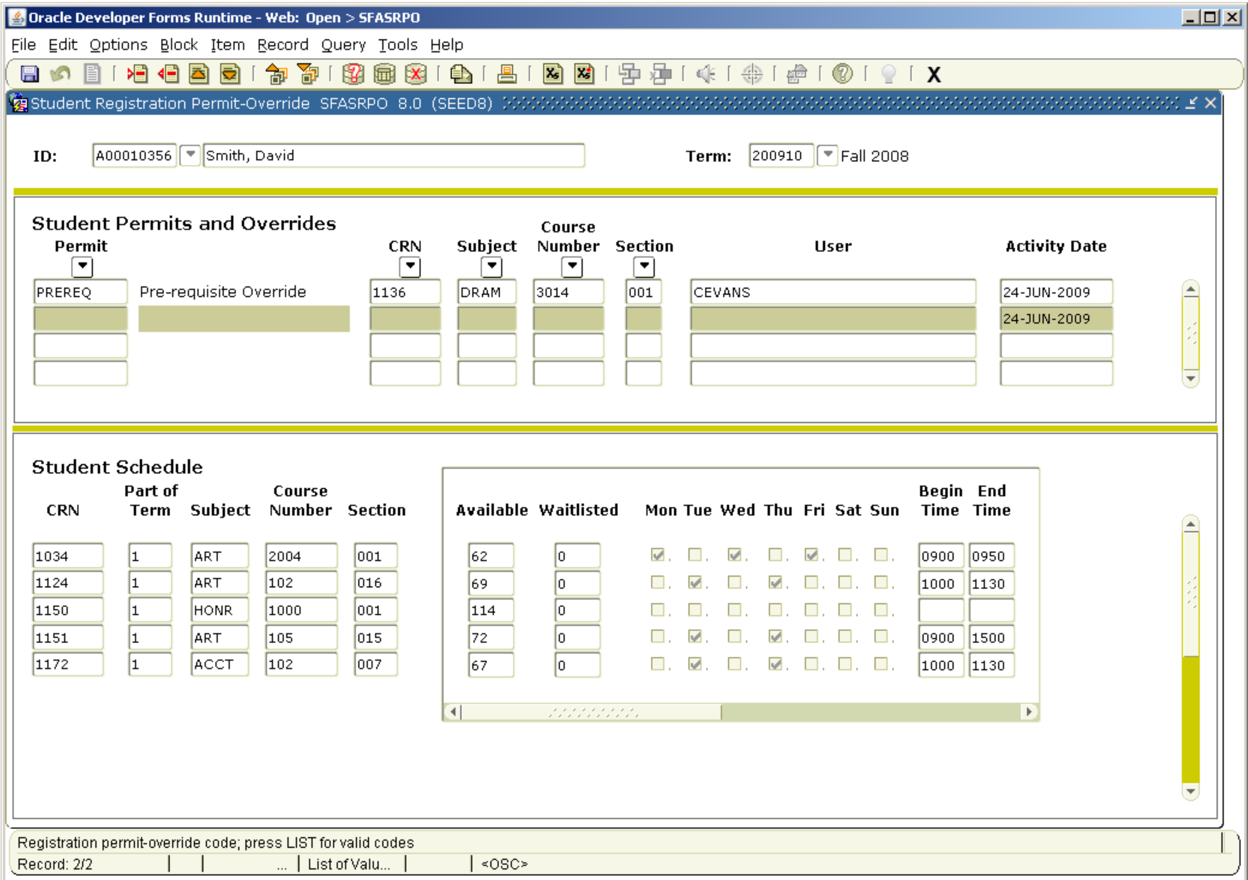
Steps

Follow these steps to complete the process of creating and defining a permit/override code.

1. Access the Registration Permit-Overrides Control Form (SFAROVR).
2. Enter your term in the **Term** field.
3. Perform a **Next Block** function.
4. Enter the override code you created in step 2 in the **Permit** field.

   Note: You can also press **List** to see a list of all available codes, then select your code from that list.
5. Click the **Time** checkbox to allow this code to override time conflicts in a student's schedule.
6. Click the **Save** icon.

Banner form



Steps

Follow these steps to assign the permit/override code to an individual student.

1. Access the Student Registration Permit-Override Form (SFASRPO).
2. Enter your term and the student's Banner ID in the key block.
3. Perform a **Next Block** function.
4. Before entering the permit/override information, take a moment to look at the student's schedule, which is shown in the Student Schedule block at the bottom of this form.
5. Enter the override code you created in a previous exercise in the **Permit** field.
6. Enter a CRN in the **CRN** field. (You can search for a valid CRN by clicking the

down arrow next to the CRN field). When you enter the CRN, the subject, course, and section numbers are automatically entered in their respective fields.

7. Click the **Save** icon.

   Result: The student can now register for this CRN in Self-Service even though it conflicts with another class in his/her schedule.

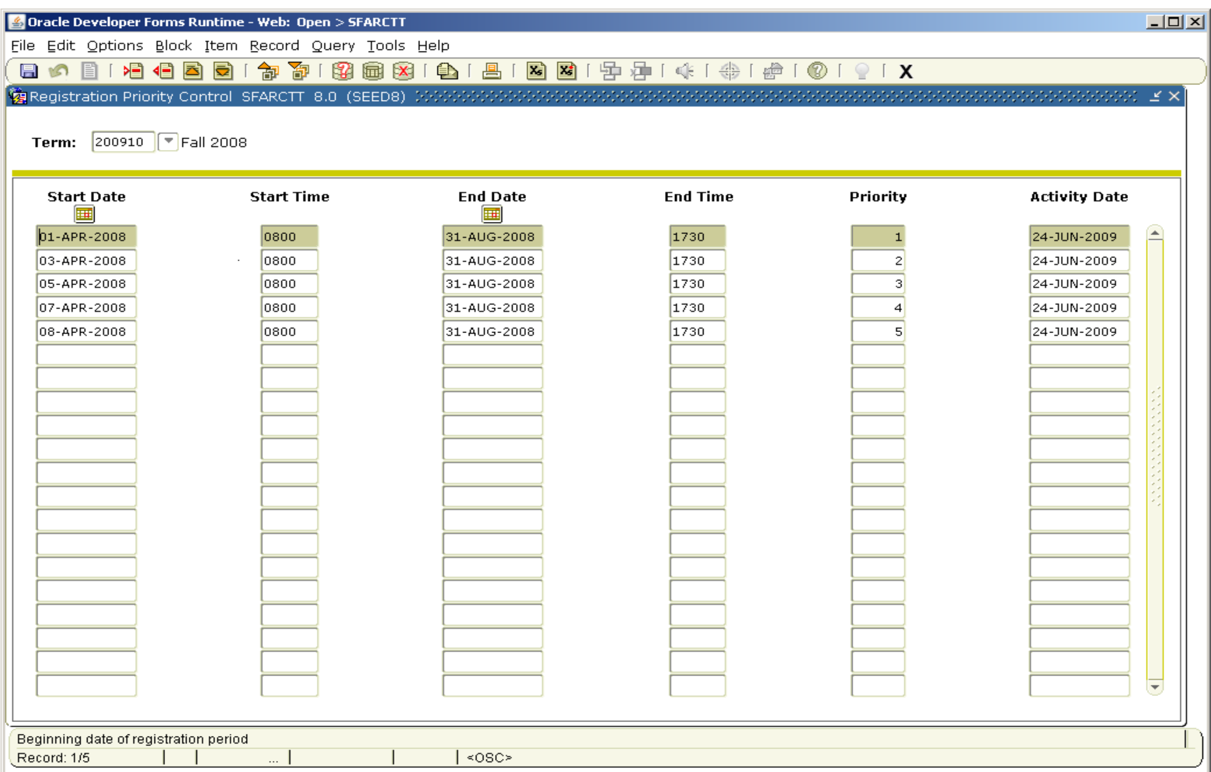
   Note: For detailed information on allowing students to perform overrides when they register for classes using Self-Service for Students, including assigning multiple override codes and assigning the code to a subject/course combination and not a specific class, see *Implementing Banner Self-Service for Students.*

What is time ticketing?

Time ticketing allows you to establish priority driven registration period time slots for students who are using Student Self-Service to register in classes. You cannot assign a student to a registration group if the student's status for the term does not allow registration. This occurs if the **Allow Registration** check box for the status code on the Student Status Code Validation Form (STVSTST) is not selected.

The student's record for the term has an inactive status.

Banner form

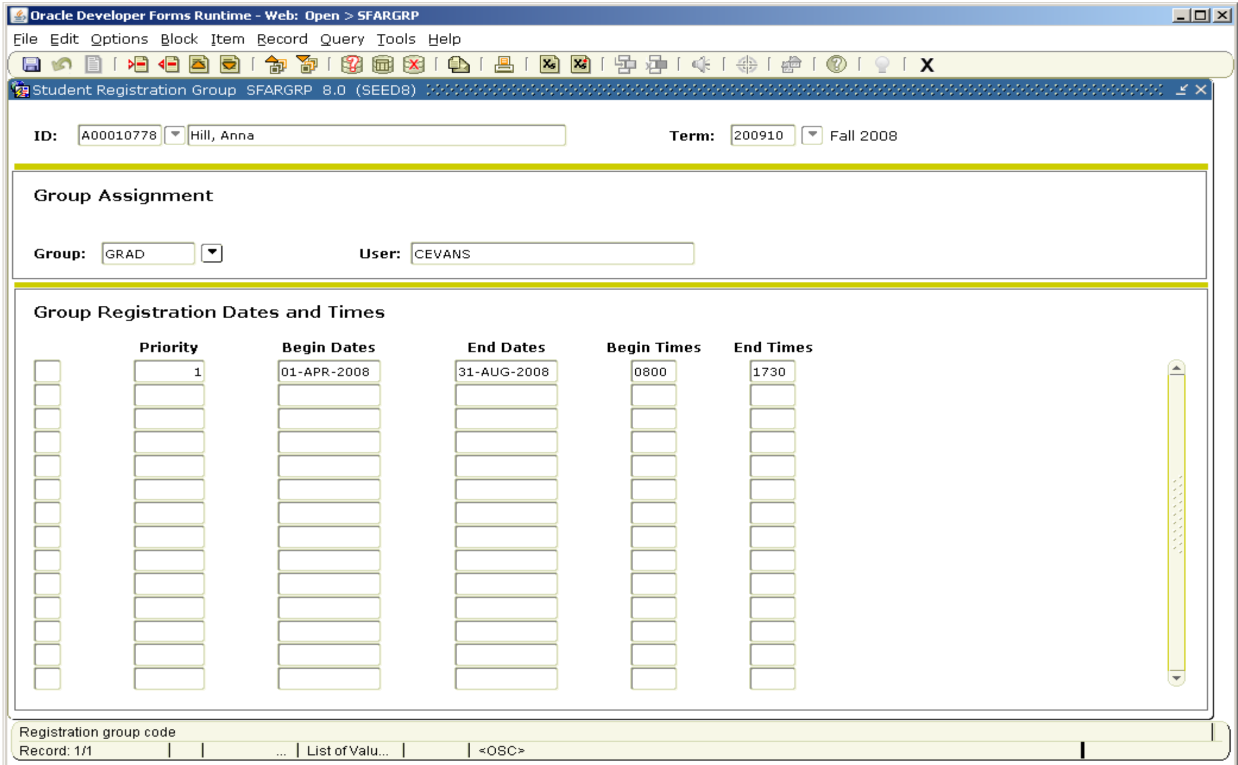


Steps

Follow these steps to set up time ticketing, an optional process.

1. Access the Registration Priority Control Form (SFARCTT).
2. Enter your term in the **Term** field.
3. Perform a **Next Block** function.
4. Enter begin and end dates and times for this time slot in the appropriate fields.
5. Enter a priority in the **Priority** field.
6. Click the **Save** icon.
7. Select **Define Registration Groups** from the **Options** menu. This opens the Registration Group Control Form (SFARCTL).
8. Enter your term in the **Term** field.
9. Perform a **Next Block** function.
10. From the **Priority** field, press **List**.
11. Select the time slot and priority you just created.
12. Enter the registration group code in the **Code** field.
13. Click the **Save** icon.
14. Click the **Exit** icon to return to SFARCTT.

Banner form



Steps

Follow these steps to complete the process of setting up time ticketing.

Note: The Third Party Registration Time Controls Form (SFARGTC) can also be used to set up priority registration groups. See the following section.

1. Select **Assign Registration Group to Student** from the **Options** menu. This opens the Student Registration Group Form (SFARGRP).
2. Enter your student's Banner ID in the **ID** field.
3. Perform a **Next Block** function.
4. In the **Group** field, select the group you created in a previous procedure.
5. Click the **Save** icon.
6. Click the **Exit** icon to return to SFARCTT.

   Note: For detailed information on time ticketing, including how to use a script to assign students to a registration group, see *Implementing Banner Self-Service* *for Students.*

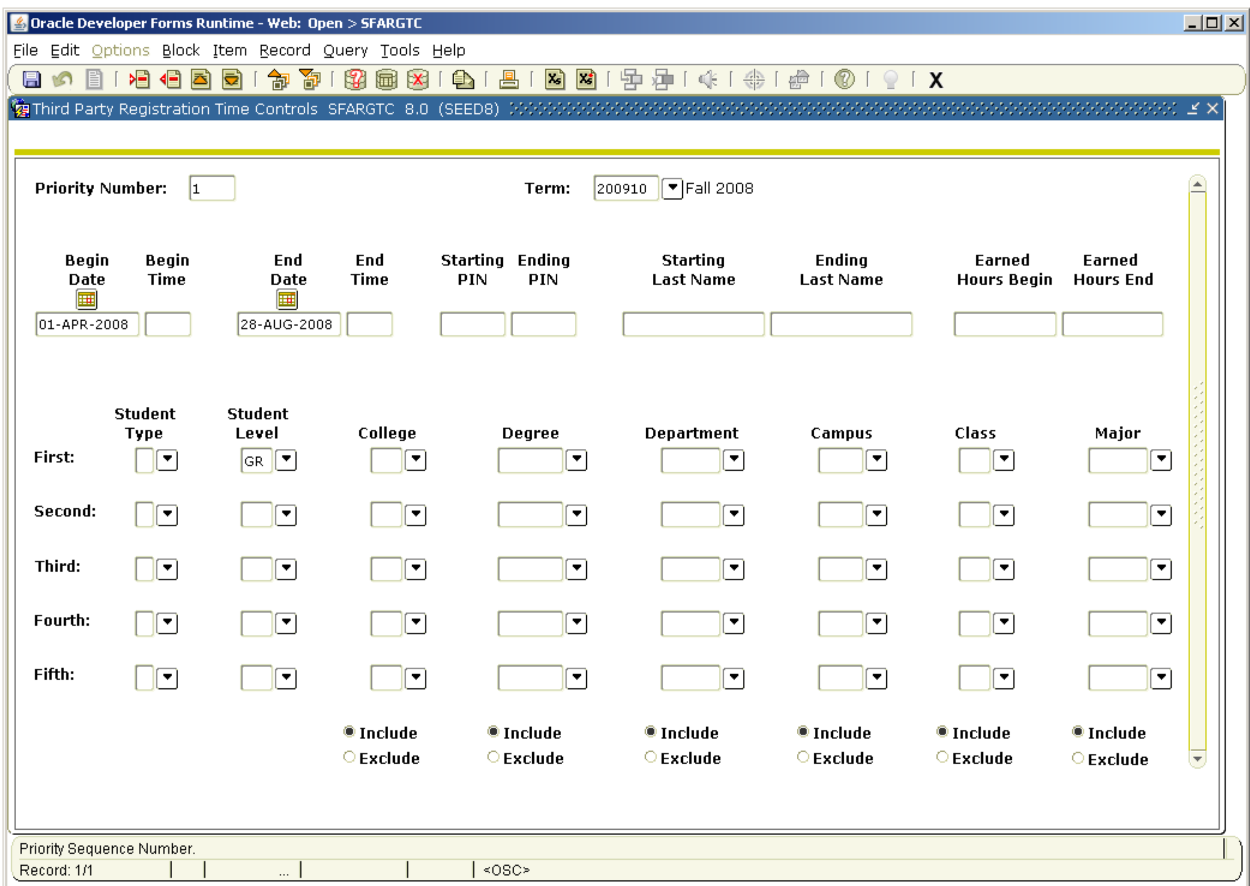
Third Party Registration Time Controls

Introduction

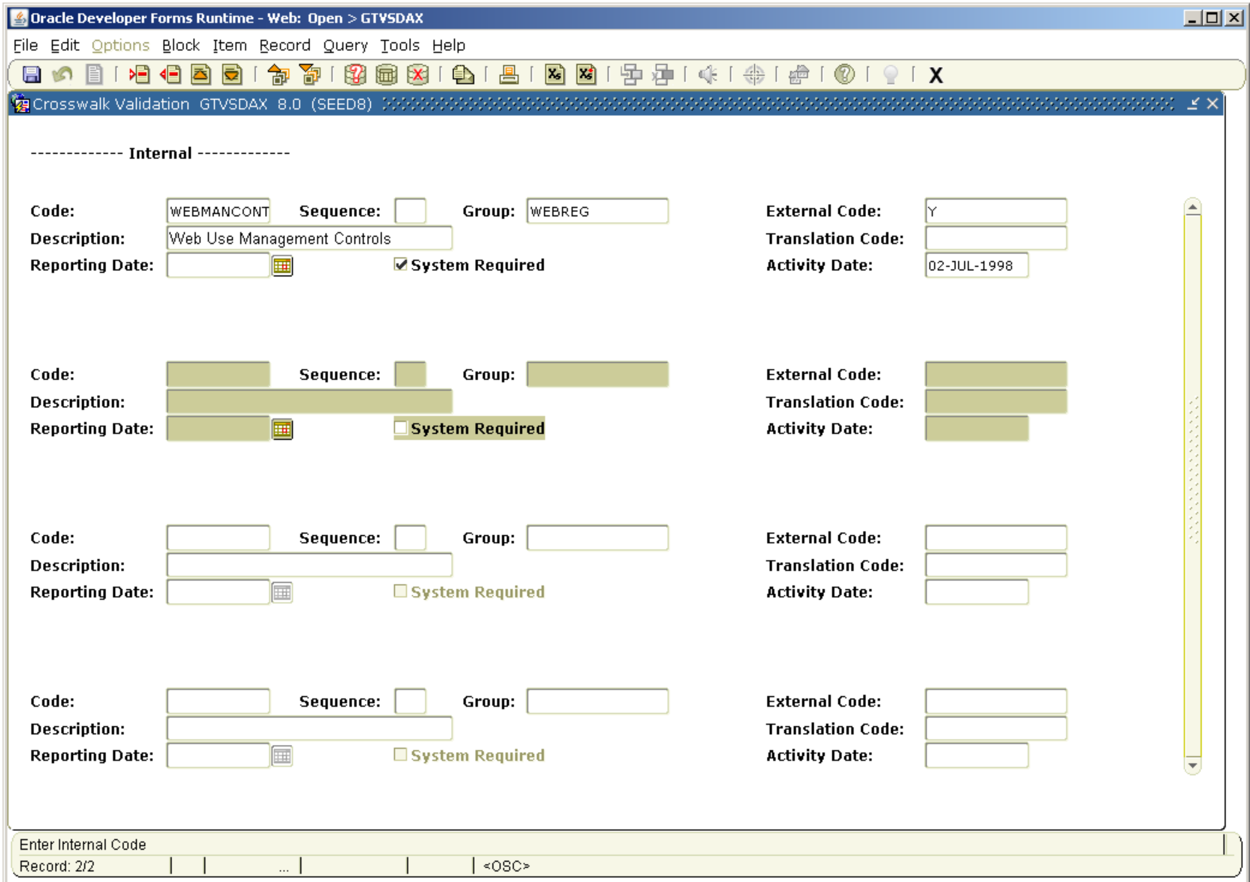
The Third Party Registration Time Controls Form (SFARGTC) provides an alternative to individually assigned time-ticketing, by offering the ability to create term-specific registration eligibility profiles whereby only those students who match the criteria for a valid time control may register at any given time.

When third-party controls are being used to enforce Web registration availability, a student's characteristics are matched against management control records maintained in the SFRCTRL table and displayed on SFARGTC.

Banner form



Banner form



Steps

Follow the steps to indicate that you are using third-party controls.

1. Access the Crosswalk Validation Form (GTVSDAX).
2. Ensure that the following values are on the form:

Field	Value
Internal Code	WEBMANCONT
Internal Sequence	(none)
Internal Group	WEBREG

Field	Value
External Code	Y The delivered value is N, which should be changed if you want to use third-party controls instead of registration group time ticketing controls.
Description	Web Use Management Controls
System Required	Cleared

Setting Up Enrollment Verification Requests on the Web

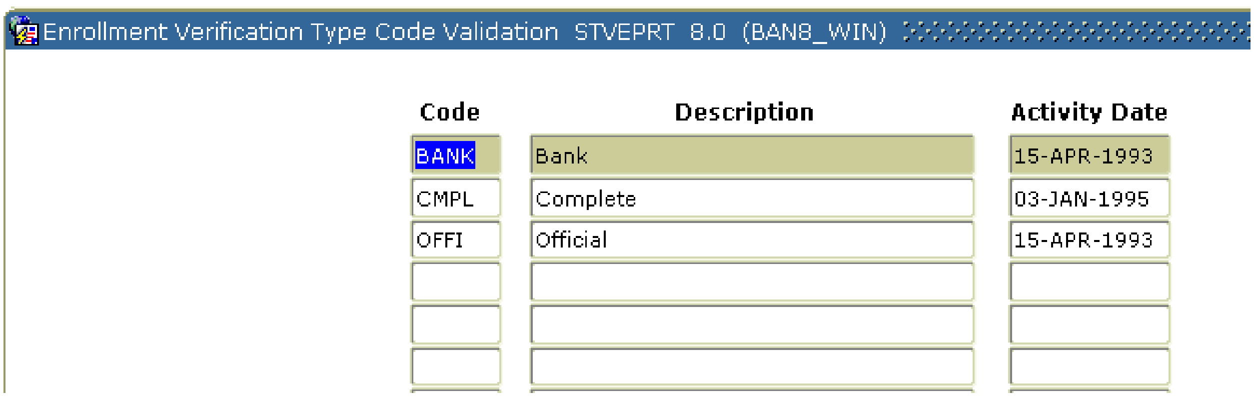
Introduction

The Enrollment Verification Request page is used to specify the term and type of enrollment verification to be sent.

The following forms are required to set up enrollment verification requests on the Web:

- Enrollment Verification Type Code Validation Form (STVEPRT)
- Enrollment Verification Request Rules Form (SFAEPRT)

Banner form


Enrollment Verification Type Code Validation STVEPRT 8.0 (BAN8_WIN)

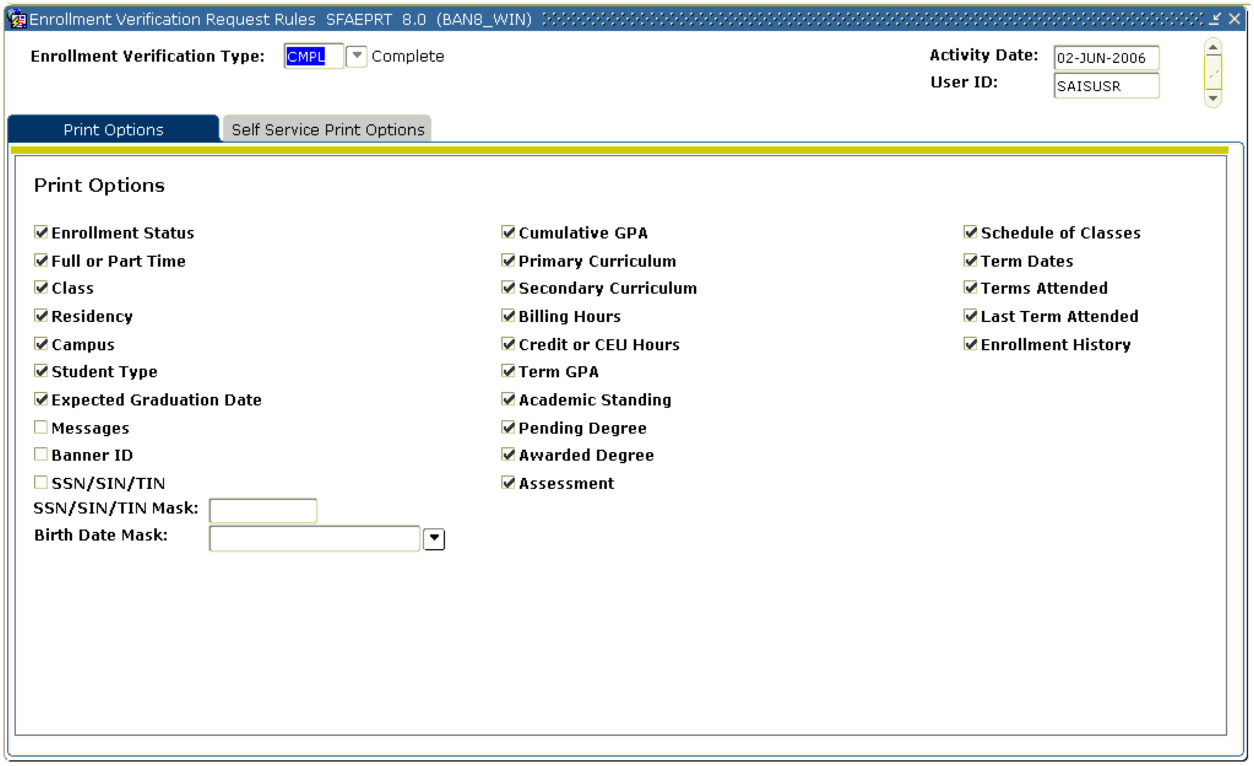
Code	Description	Activity Date
BANK	Bank	15-APR-1993
CMPL	Complete	03-JAN-1995
OFFI	Official	15-APR-1993

Steps

Follow these steps to define the Enrollment Verification type codes you want to be available on the web.

1. Access the Enrollment Verification Type Code Validation Form (STVEPRT).
2. Perform an **Insert Record** function.
3. Enter the code name in the **Code** field.
4. Enter a description of the code in the **Description** field.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Banner form



Steps

Follow these steps to create the enrollment verification request rules.

1. Access the Enrollment Verification Request Rules Form (SFAEPRT).

2. Enter the appropriate code in the **Enrollment Verification Type** field.

3. Perform a **Next Block** function or click the **Print Options** tab.

4. Select each appropriate checkbox for each option you want to be printed on the enrollment verification for this type code.

   Note: If you select the **SSN/SIN/TIN** checkbox, use the **SSN/SIN/TIN Mask** field to specify the masking you want to use. Use the character *X* to indicate that the data in that position is to be displayed, and use the character *** to indicate that the data in that position is to be concealed.

5. Select the **Birth Date Mask** pull-down list to choose the format in which you want the birth date to be displayed.

6. Click the **Save** icon.

7. Perform a **Next Block** function or select the Self Service Print Options tab.

8. Use the Processing Controls block to select these options:

   - Select the **Self-Service Request** checkbox to allow paper enrollment verification requests to be processed from self-service.

   - Select the **Self-Service Academic Year** checkbox to allow enrollment verification requests to be selected by academic year when processed from Self-Service.

   - Use the **Self-Service Confirmation Letter** field to select the self-service confirmation letter to be used for the enrollment verification request.

   - Use the **Self-Service Printers** field to select the destination printer where the confirmation letter is to be printed.

9. Perform a **Next Block** function.

10. Enter or select the self-service option code to be associated with the enrollment verification request type in the **Code** field.

11. Enter the code for the type of Accounts Receivable account the charges associated with the learner's enrollment verification request will be posted in the **Type** field.

    Values: *S* (Student) or *M* (Miscellaneous)

12. Enter the monetary amount of the charge associated with the self-service option code in the **Charge** field.

    Note: The system automatically defaults the charge value defined on the Web Self-Service Options Validation Form (STVWSSO), but you can change it.

13. Enter the appropriate code in the **Per** field.

    Note: The code is for the indicator for whether the option will be charged per enrollment verification request or per enrollment verification copy.

    Values: *R* (per request) or *C* (per copy)

14. Perform a **Next Block** function.

15. Select the payment option code to be associated with the enrollment verification request type in the **Code** field.

16. Click the **Save** icon.

17. Click the **Exit** icon.

Setting up Option to Update Majors, Educational Goals, and Employment Expectations

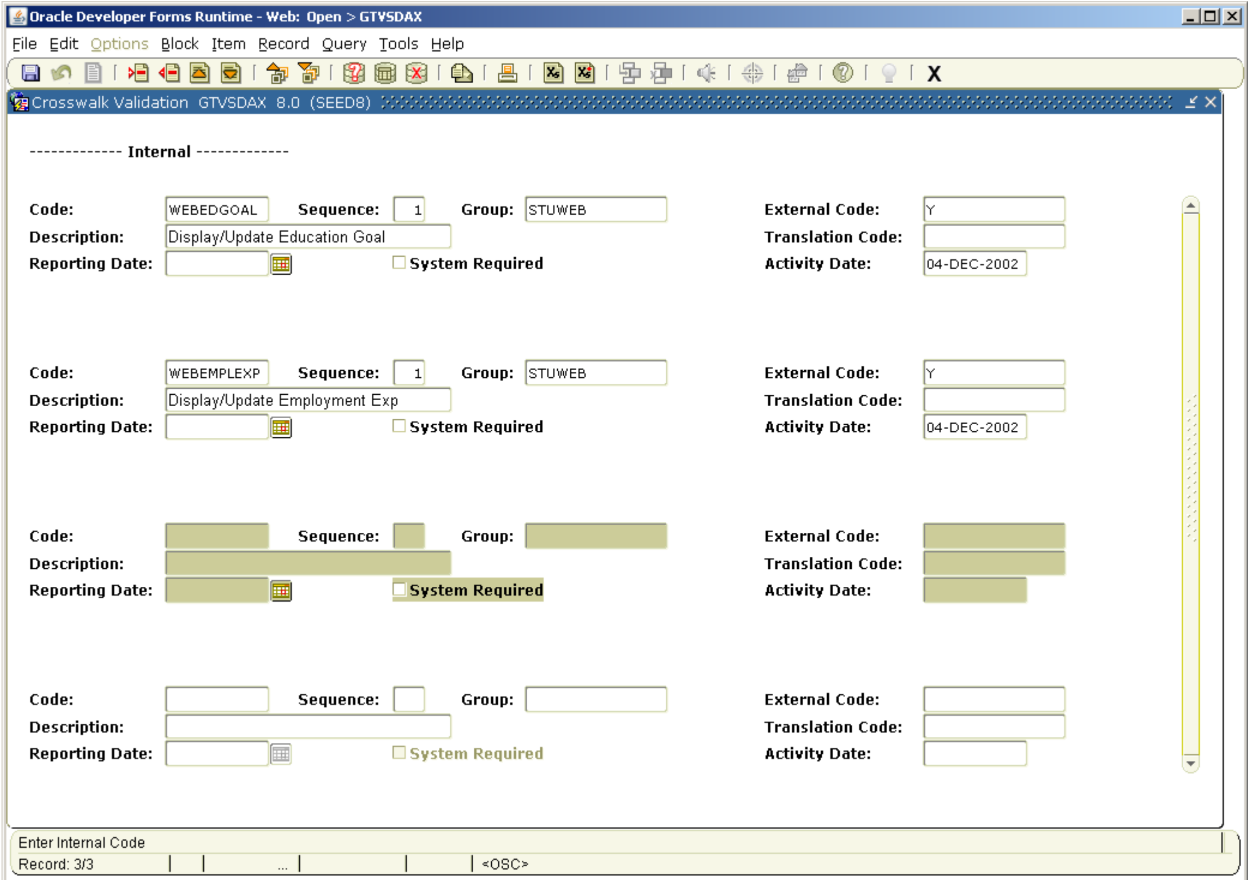
Introduction

When Student Self-Service is delivered, these procedures and menus are disabled:

- bwskxmis.p_studenttermdata (procedure)
- bwskxmis.p_updatestudenttermdata (procedure)
- bwskxmis.p_studenttermdata (menu).

These items can be used to permit students to update their major, educational goal, and employment expectation for any term for which they haven't already registered or changed the information.

Banner form



Oracle Developer Forms Runtime - Web: Open > GTVSDAX
File Edit Options Block Item Record Query Tools Help
Crosswalk Validation GTVSDAX 8.0 (SEED8)
------------- Internal -------------
Code: WEBEDGOAL Sequence: 1 Group: STUWEB
External Code: Y
Description: Display/Update Education Goal
Translation Code:
Reporting Date:
System Required
Activity Date: 04-DEC-2002
Code: WEBEMPLEXP Sequence: 1 Group: STUWEB
External Code: Y
Description: Display/Update Employment Exp
Translation Code:
Reporting Date:
System Required
Activity Date: 04-DEC-2002
Code: Sequence: Group:
External Code:
Description:
Translation Code:
Reporting Date:
System Required
Activity Date:
Code: Sequence: Group:
External Code:
Description:
Translation Code:
Reporting Date:
System Required
Activity Date:
Enter Internal Code
Record: 3/3
<OSC>

Steps

Set up the following rows on GTVSDAX to either enable or disable the option to allow each of these updates.

1. Access the Crosswalk Validation Form (GTVSDAX).
2. Ensure that the following values are on the form:

Field	Value
Internal Code	WEBEDGOAL
Internal Sequence	1
Internal Group	STUWEB
External Code	Y or N
Description	Display/Update Educational Goal
Internal Code	WEBEMPLEXP
Internal Sequence	1
Internal Group	STUWEB
External Code	Y or N
Description	Display/Update Employment Exp

Setting up Student Records

Introduction

The Student Records feature allows students to

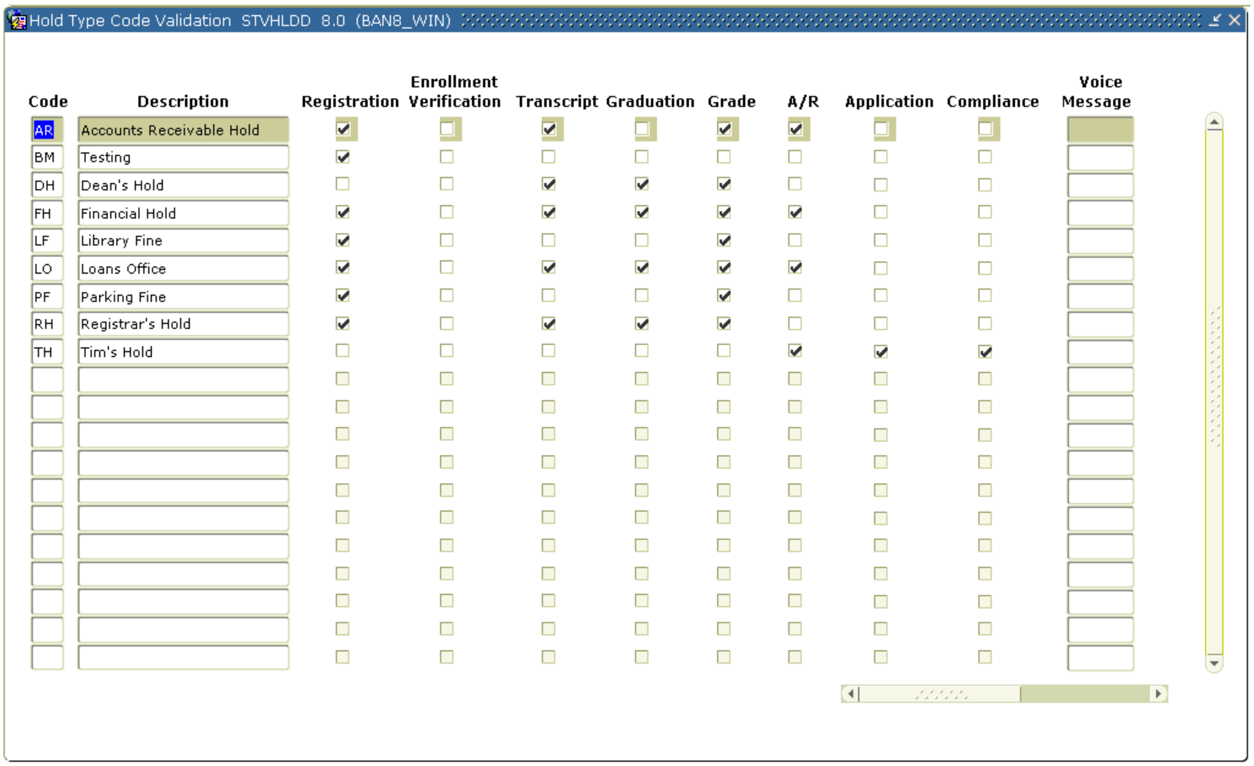
- view holds
- view grades (midterm, final, detail)
- see academic transcripts
- request printed transcripts
- view status of transcript request
- account information (account summary regular and by term)
- taxes (information and notification)
- degree evaluations (degree evaluations are covered in the next lesson)
- view course catalog
- view student information
- view class schedule
- apply for Graduation.

Setting up Holds on the Web

Introduction

The Hold Type Code Validation Form (STVHLDD) is used to set up holds on the web.

Banner form



Hold Type Code Validation STVHLDD 8.0 (BAN8_WIN)

Code	Description	Registration	Enrollment Verification	Transcript	Graduation	Grade	A/R	Application	Compliance	Voice Message
AR	Accounts Receivable Hold	✓		✓		✓	✓			
BM	Testing	✓								
DH	Dean's Hold			✓	✓	✓				
FH	Financial Hold	✓		✓	✓	✓	✓			
LF	Library Fine	✓				✓				
LO	Loans Office	✓		✓	✓	✓	✓			
PF	Parking Fine	✓				✓				
RH	Registrar's Hold	✓		✓	✓	✓				
TH	Tim's Hold						✓	✓	✓	

Steps

Follow these steps to Web-enable hold codes.

1. Access the Hold Type Code Validation Form (STVHLDD).
2. Locate the appropriate hold codes and, for each one, click the web indicator checkbox to enable the code to be viewed on the web.
3. Click the **Save** icon.
4. Click the **Exit** icon.

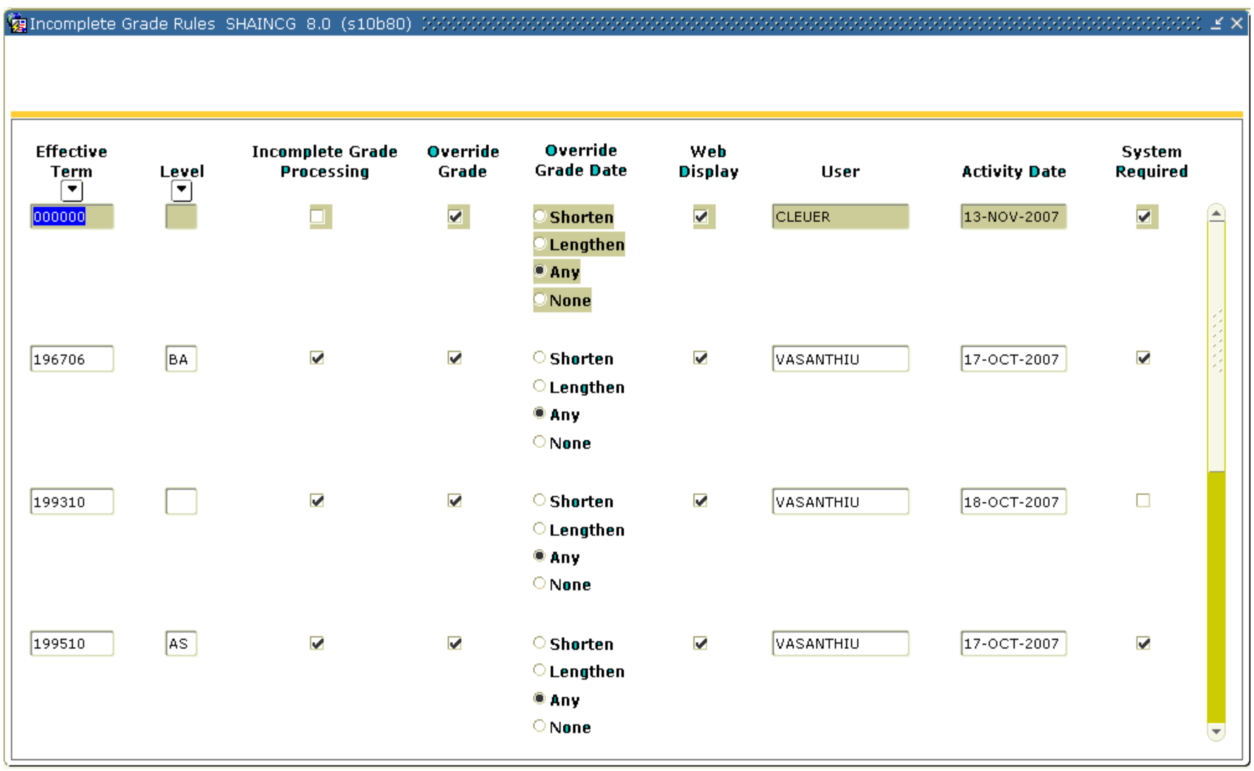
Setting up Incomplete Grade Display

Introduction

Grades are displayed in Banner Student Self-Service in the Final Grades page. When the **Web Display (Indicator)** on the Incomplete Grades Rules Form (SHAINCG) is selected for the rule, incomplete grades are displayed in self-service within a separate data block, including the class information, incomplete grade, associated extension date and the default, final, replacement grade. In Banner Faculty and Advisor Self-Service, instructors may also enter and override the incomplete final grade for the incomplete grade, as well as override the default date, as long as permission to do so has been granted on the governing incomplete grade processing rule.

For more detailed information about Incomplete Grade Processing, please see the Banner Student User Guide and the Banner Student Registration Workbook.

Banner form


Incomplete Grade Rules SHAINCG 8.0 (s10b80)

Effective Term	Level	Incomplete Grade Processing	Override Grade	Override Grade Date	Web Display	User	Activity Date	System Required
000000		☐	☑	○ Shorten ○ Lengthen ● Any ○ None	☑	CLEUER	13-NOV-2007	☑
196706	BA	☑	☑	○ Shorten ○ Lengthen ● Any ○ None	☑	VASANTHIU	17-OCT-2007	☑
199310		☑	☑	○ Shorten ○ Lengthen ● Any ○ None	☑	VASANTHIU	18-OCT-2007	☐
199510	AS	☑	☑	○ Shorten ○ Lengthen ● Any ○ None	☑	VASANTHIU	17-OCT-2007	☑

Steps

Follow these steps to set up the display of incomplete grades on Banner Student Self-Service.

1. Access the Incomplete Grades Rules Form (SHAINCG).

2. Select the effective term for the rule in the **Effective Term** field.

3. Select the level for the rule in the **Level** field.

   Note: If no level is selected, all levels will be included.

4. If you do not wish to have automated incomplete grade processing for this rule, uncheck the **Incomplete Grade Processing** checkbox.

5. If you do not wish to allow instructors to override a default, incomplete final grade for this rule, uncheck the **Override Grade** checkbox.

6. If you wish to restrict faculty permission to override the extension date for incomplete grades, change the **Override Grade Date** radio group from *Any* to one of the remaining choices.

   Note: The setting of these radio buttons indicates whether faculty have permission to override the extension date for incomplete grades in relation to the default value. The choices include the ability to shorten or lengthen the extension date, (*Shorten* or *Lengthen*), to do either, (*Any*), or not allowed to override, (*None*). The default setting is *Any*.

7. If you do not wish to allow students to view their incomplete grade information on the web for this rule, uncheck the **Web Display** checkbox. When this box is unchecked, only the incomplete grade is displayed.

   Note: The default for incomplete grade rules is that this checkbox is selected, and the incomplete default substitute final grade and extension date values are displayed in Banner Student Self-Service in the incomplete grade block on the Final Grades page.

8. Observe the user ID in the **User** field. This is the last user who updated the record, and is display only.

9. Observe the date in the **Activity Date** field. This is the date the record was last updated, and is display only.

10. Observe the setting of the **System Required** checkbox. If checked, this box indicates that this rule is required by the system. Once this box is checked it cannot be unchecked.

    Note: The system required term value of ***000000*** is delivered to populate the table and reflect that incomplete grade processing has been inactive. This term code record should exist to indicate that incomplete grading is turned off for all levels. This provides an audit history perspective for terms before the automated processing was in use.

11. Click on the **Save** icon.

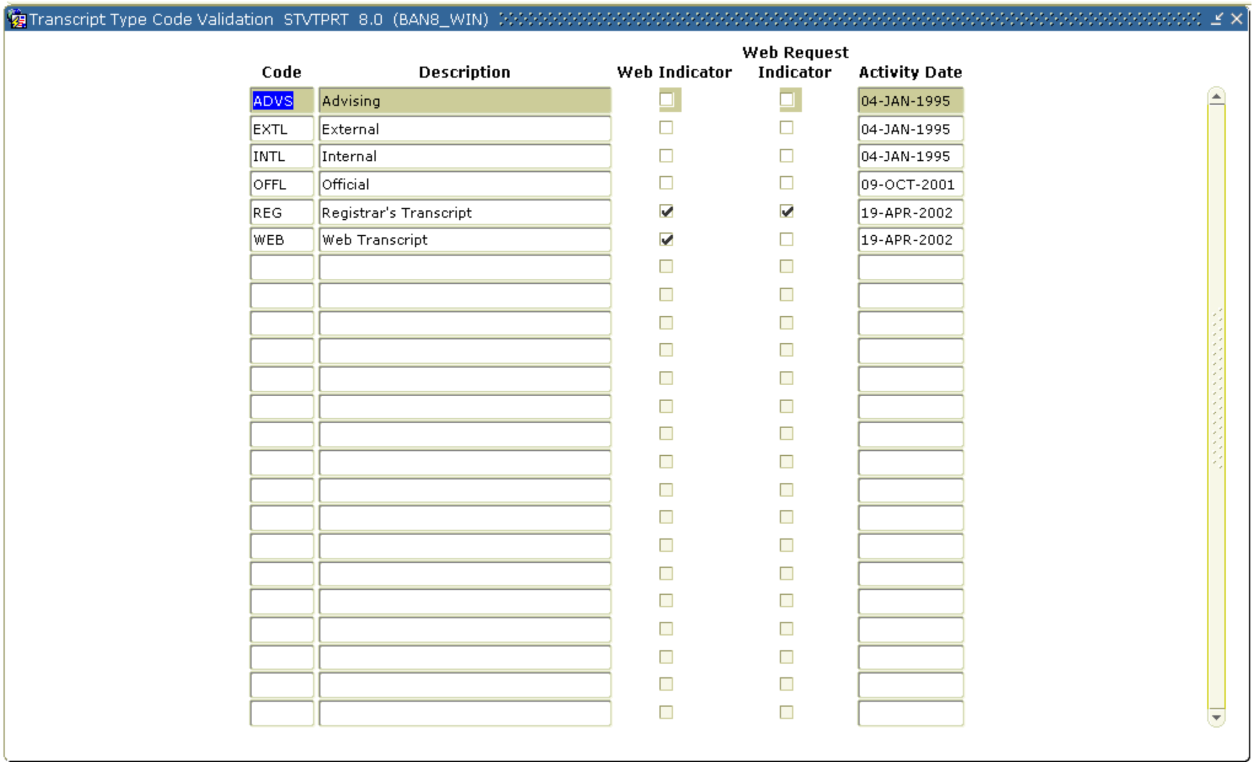
12. Click on the **Exit** icon.

Setting up the Academic Transcript on the Web

Introduction

The Transcript Type Code Validation Form (STVTPRT) is used to set up academic transcripts on the web.

Banner form



Transcript Type Code Validation STVTPRT 8.0 (BAN8_WIN)

Code	Description	Web Indicator	Web Request Indicator	Activity Date
ADVS	Advising	☐	☐	04-JAN-1995
EXTL	External	☐	☐	04-JAN-1995
INTL	Internal	☐	☐	04-JAN-1995
OFFL	Official	☐	☐	09-OCT-2001
REG	Registrar's Transcript	☑	☑	19-APR-2002
WEB	Web Transcript	☑	☐	19-APR-2002

Steps

Follow these steps to set up academic transcript.

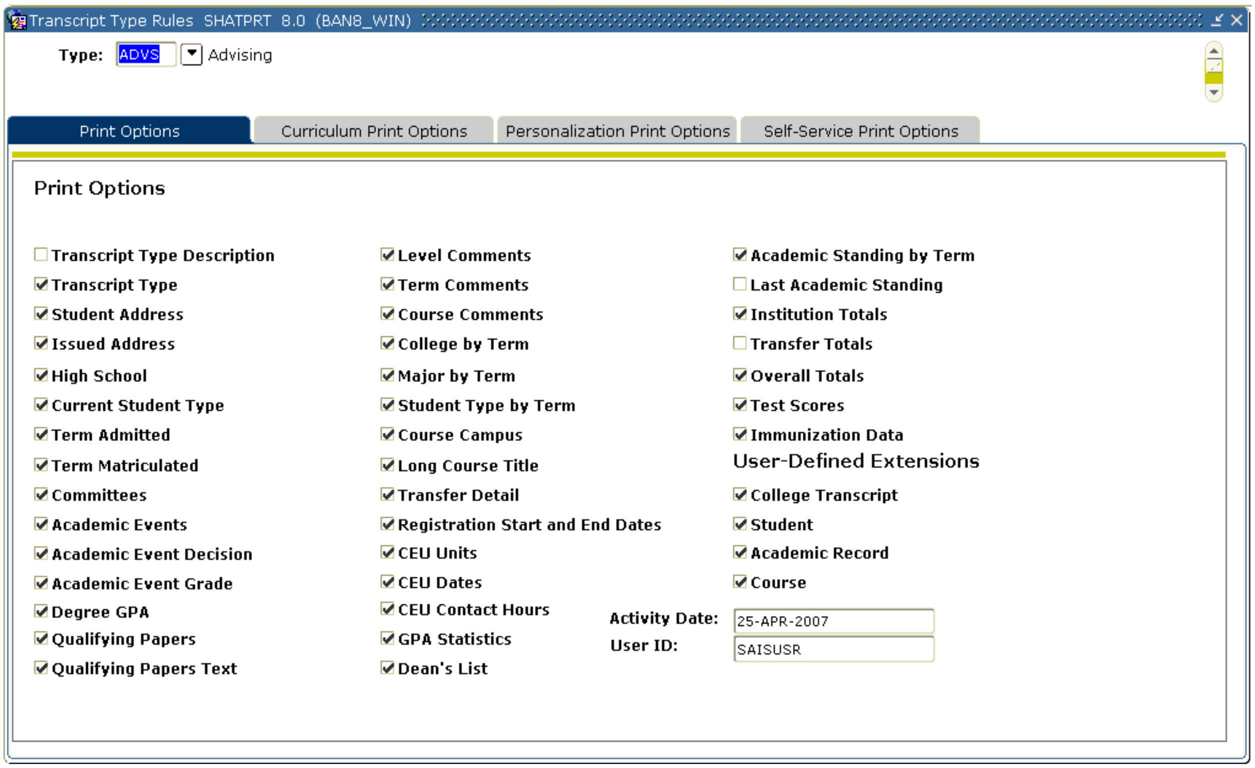
1. Access the Transcript Type Code Validation Form (STVTPRT).
2. For your transcript type code, click the **Web Indicator** checkbox.
3. Click the **Save** icon.
4. Click the **Exit** icon.
5. Access the Transcript Type Rules Form (SHATPRT).
6. Enter your web transcript code in the **Type** field – *Web*.
7. Click the checkbox for the items to be displayed on your web transcript.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Setting up the Web Transcript Request

Introduction

The Transcript Type Rules Form (SHATPRT) is used to set up web transcript requests.

Banner form



Steps

Follow these steps to set up web transcript request processing.

1. Access the Transcript Type Rules Form (SHATPRT).
2. Perform an **Enter Query** function.
3. Select a transcript type in the **Type** field.
4. Perform an **Execute Query** function.
5. Click each of the items that you want to be printed for the transcript type

selected.

6. Perform a **Next Block** function or click the Curriculum Print Options tab.

   Note: Use this block to select the curriculum data to be included in the transcript.

   This window is divided into four sections: Primary Learner Curriculum, Secondary Learner Curriculum, Primary Outcome Curriculum, and Secondary Outcome Curriculum.

7. Select the appropriate checkboxes for this window.

8. Perform a **Next Block** function or click the Personalization Print Options tab.

   Note: This window is used to set up how birth date, SSN, and Banner ID information will be displayed on the transcript, as well as name hierarchy sequence and source information.

9. Perform a **Next Block** function or click the Self-Service Print Options tab.

   Note: This window is used to specify the detailed information needed for a self-service transcript request.

10. Select the appropriate Processing Control options, if applicable.

    - If you want students to be able to request that transcripts be sent via electronic data interchange (EDI) or in XML format, click the **Allow Electronic Transcripts on the Web** checkbox.

    - If you want to allow students to be able to specify that transcript requests be held until grades have been posted, click the **Allow Hold for End of Term Processing** checkbox.

    - If you want to allow students to be able to specify that transcript requests be held until degrees have been posted, click the **Allow Hold for Degree Processing** checkbox.

11. Click the **Save** icon.

12. Click the **Save** icon.

13. Access the Web Self Service Option Code Validation Form (STVWSSO).

14. Define the transcript delivery methods and their associated charges.

15. Click the **Save** icon.

16. Click the **Exit** icon.

17. Access the Web Payment Option Code Validation Form (STVWPYO).

18. Define the transcript payment methods.

    Note: If a method is to incur credit card charges, click the **For Credit Card** checkbox.

19. Click the **Save** icon.

20. Click the **Exit** icon.

21. Access the Transcript Type Rules Form (SHATPRT).

22. Select the **Self Service Print Options** tab.

23. Perform a **Next Block** function to the Service Level block.

24. Define each delivery method that you want to be available on the Web.

    - In the **Per** field, specify whether charges are to be assessed per copy (*C*) or per request (*R*).

    - In the Payment Options block, define each payment option that you want to be available on the Web.

25. Click the **Save** icon.

26. Click the **Exit** icon.

27. Access the Degree Code Validation Form (STVDEGC).

28. For each degree code that should appear in a Web transcript, select the **Web Indicator** check box.

29. Click the **Save** icon.

30. Click the **Exit** icon.

31. Access the Web Transcript Request Rules Form (SHAWTRR).

32. In the **Maximum transcripts per request** field, enter the maximum number of transcripts you want a student to be able to order per request.

33. In the **Maximum free transcripts before charges** field, enter the maximum number of transcripts a student can request before charges are applied to requests.

34. Click the **Save** icon.

35. Click the **Exit** icon.

36. Access the Source/Background Institution Code Validation Form (STVSBGI).

37. If available, enter the source code in the **Source or Background Institution** field.

    Note: You can also search by entering the source name in the **Description** field. For example, *Yale University.*

38. Select the **Execute Query** icon.

39. Enter ***E*** in the **Electronic** field if transcripts can be sent to the source via EDI or a **P** to send the transcript is PESC/XML format.

40. Click the **Save** icon.

41. Click the **Exit** icon.

42. Access the Source/Background Validation Form (SOASBGI).

43. Enter the same source code used in the previous form in the **Source or Background Institution** field.

44. Perform a **Next Block** function.

45. For each school that you want to be available via the lookup functionality, enter appropriate values in *both* the **City** field *and* either the **State/Province** or the **Nation** field.

46. Click the **Save** icon.

47. Click the **Exit** icon.

Steps

Follow these steps to set up the Signature page.

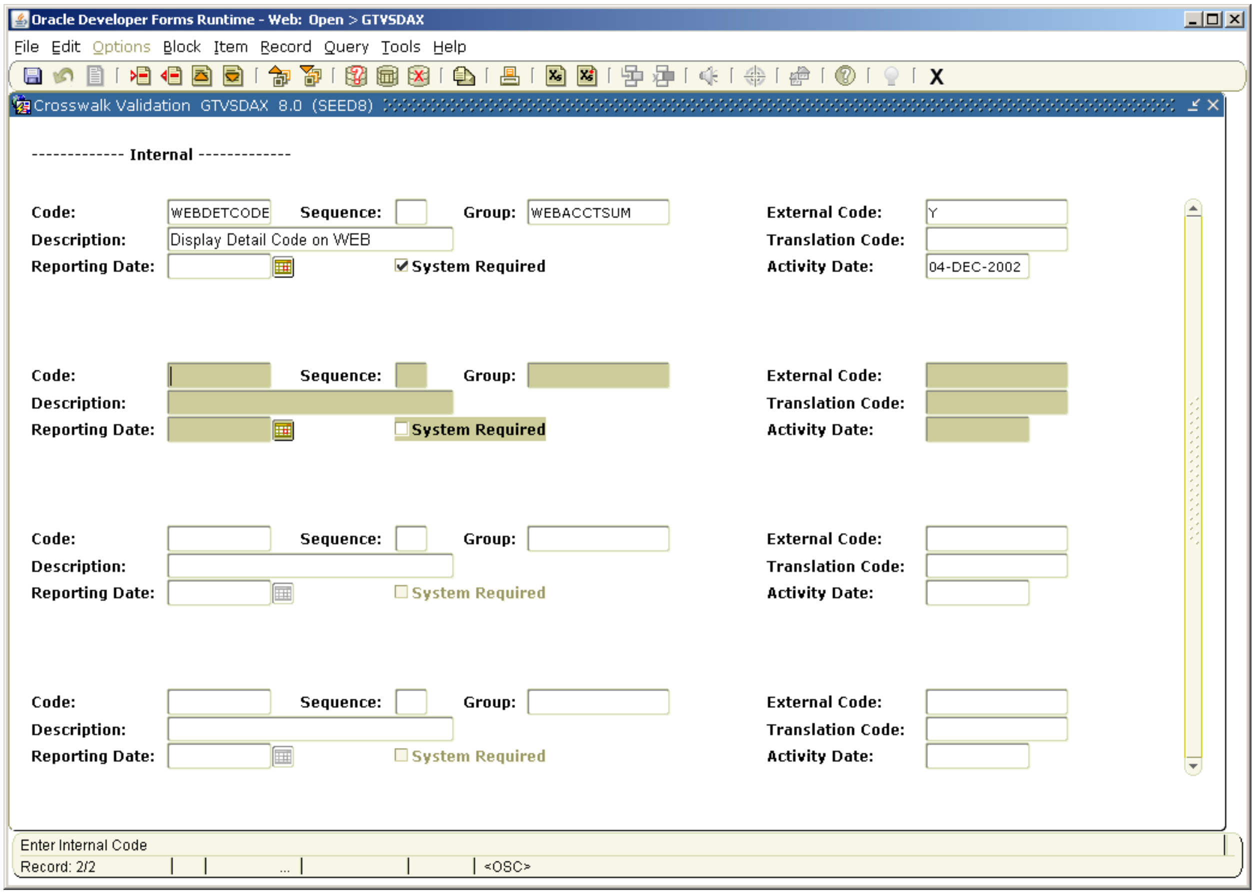
1. Access the Letter Code Validation Form (GTVLETR).
2. Create a **Letter Code** and enter a **Description** for the letter you want to be displayed on your Signature Page.
3. Click the **Save** icon.
4. Click the **Exit** icon.
5. Access the HTML Letter Rules Form (SOAELTL).
6. Enter the letter code from GTVLETR in the **Letter** field.
7. Enter *T* in the **Module** field.
8. Click the **Save** icon.
9. Click the **Exit** icon.
10. Access the Format HTML Letter Rules Form (SOAELTR).
11. Enter the letter you defined on GTVLETR in the **Letter Code** field.
12. Perform a **Next Block** function.
13. Format the text you want to appear on the Signature page.
14. Click the **Save** icon.
15. To view the letter you have formatted, click the **Display Letter** button at the bottom of the form.
16. Click the **Exit** icon.
17. Access the Transcript Type Rules Form (SHATPRT).
18. Enter your web transcript type in the **Type** field – Enter *Web.*
19. Select the **Self Service Print Options** tab.
20. Enter the letter you defined on GTVLETR in the **Electronic Letter Code** field.
21. Click the **Save** icon.
22. Click the **Exit** icon.

Setting up Account Summary Pages on the Web

Introduction

The Crosswalk Validation Form (GTVSDAX) is used to set up account summary pages on the web.

Banner form



Steps

Follow these steps to set up account summary pages on the web.

1. Access the Crosswalk Validation Form (GTVSDAX).
2. Ensure that these values are displayed.

Field	Value
Internal Code	WEBDETCODE
Internal Sequence	(none)
Internal Group	WEBACCTSUM
External Code	Y
Description	Display Detail Code on Web
Translation Code	(none)
System Required	Cleared.

Setting up WebCAPP - Degree Evaluations

Introduction

If you are already using the Curriculum, Advising, and Program Planning (CAPP) feature in Banner Student, then you can also use the WebCAPP feature in both Self-Service for Students and Self-Service for Faculty.

Using WebCAPP, students can audit their course work against selected primary and secondary programs. They can initiate an audit, view results, and print degree audit evaluations via the Web. WebCAPP interfaces with the Banner Student system, providing uniform Web access functionality to CAPP information in the Banner software.

In this lesson, you will learn how to set up Banner Student so that students can use WebCAPP.

For information on how to set up CAPP in Banner Student, see the *Using Curriculum, Advising, and Program Planning with Banner Student* handbook.

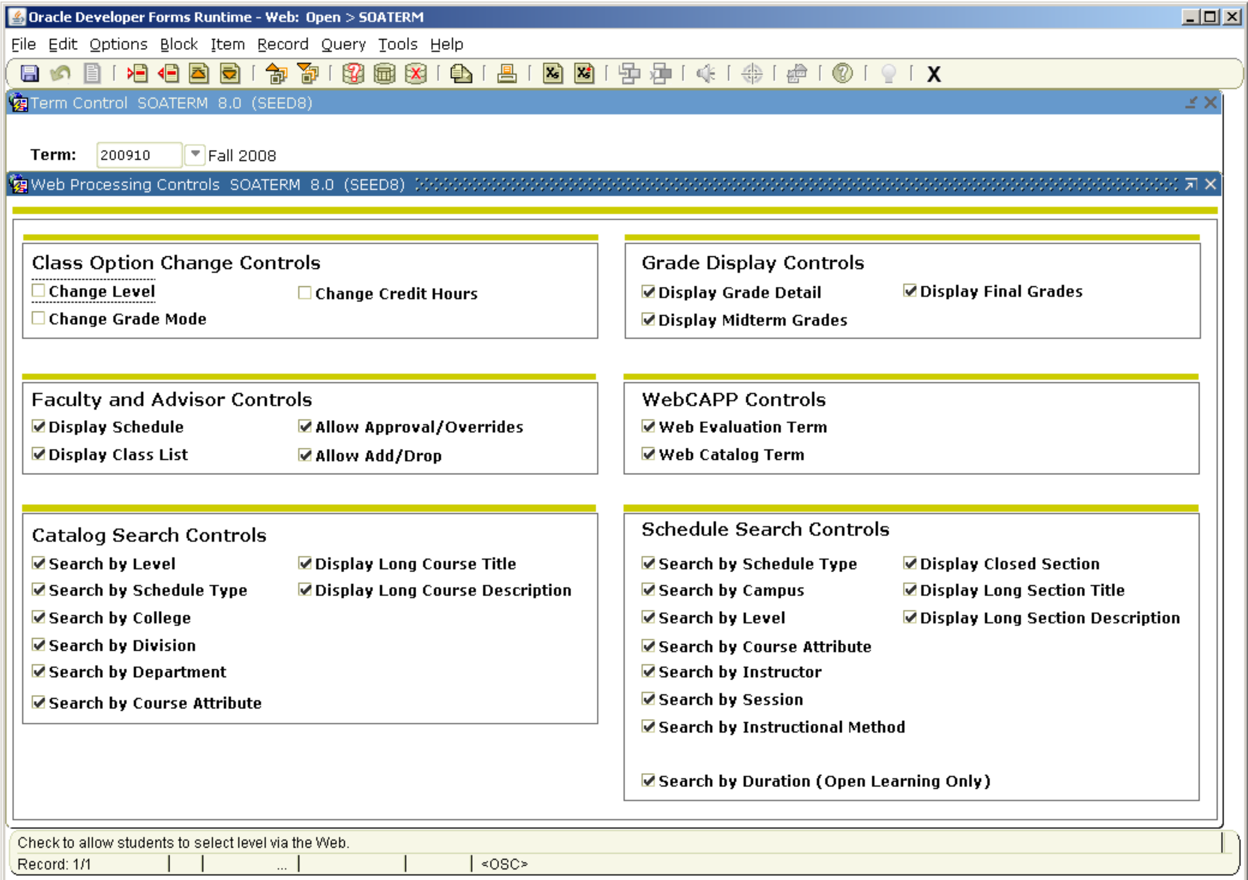
What is included in a degree evaluation?

The Degree Evaluation record lists the curriculum for which a degree evaluation can be run. It displays information for a student's curriculum program (primary and secondary). For each curriculum program, it displays this information

- Catalog Term
- Level
- Campus
- College
- Degree
- Major (1 and 2)
- Department (1 and 2)
- Concentration (1,2, and 3)
- Minor (1 and 2)

If a program on the record has a link, students can view the last generated evaluation for that curriculum.

Banner form

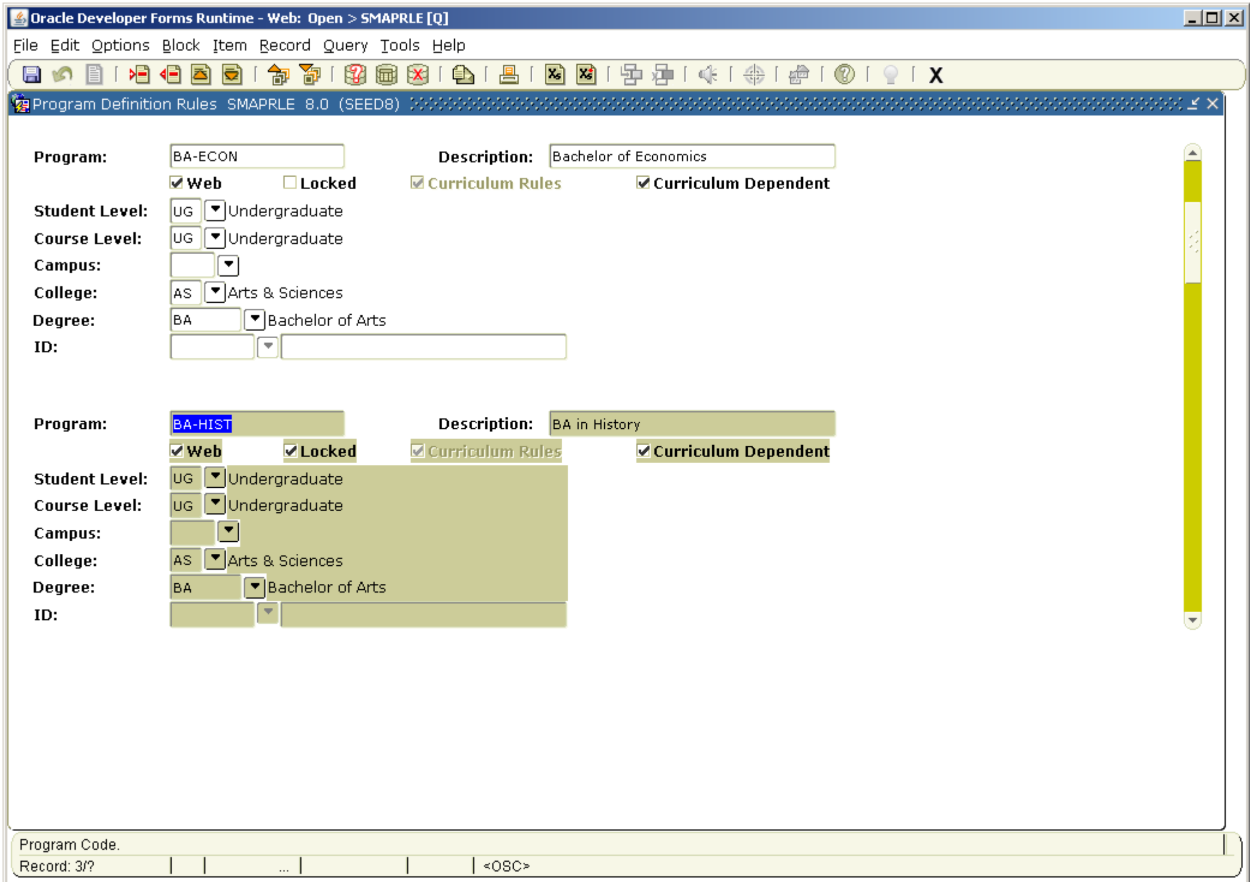


Steps

Follow these steps to permit new degree evaluations to be generated for a term.

1. Access the Term Control Form (SOATERM).
2. Enter your term in the key block.
3. Perform a **Next Block** function.
4. Select **Web Processing Controls** from the **Options** menu.
5. In the Web CAPP Controls area, select the **Web Evaluation Term** checkbox.
6. Click the **Save** icon.

Banner form

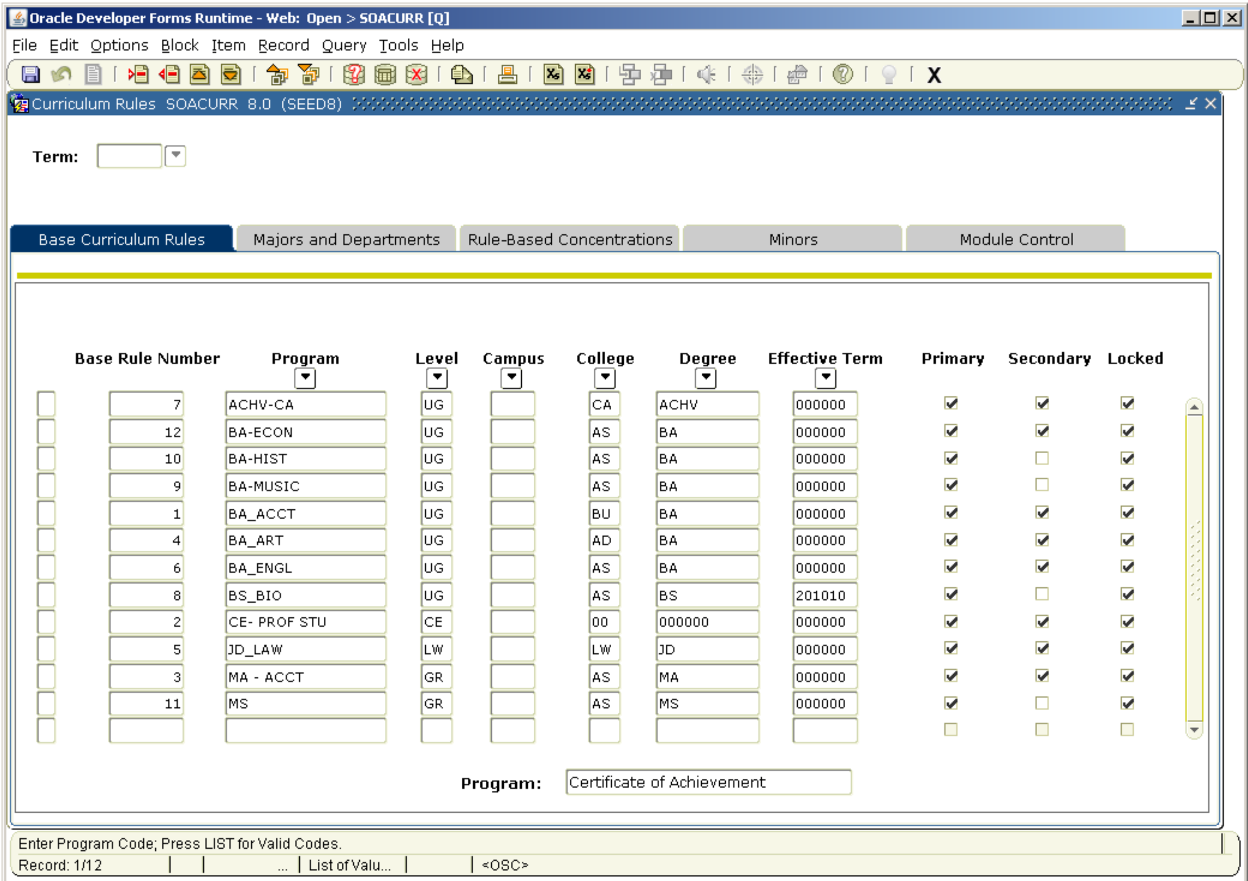


Steps

Follow these steps to Web-enable programs.

1. Access the Program Definition Rules Form (SMAPRLE).
2. Perform an **Enter Query** function.
3. Enter a program name in the **Program** field.
4. Perform an **Execute Query** function (F8).
5. Click the **Web** checkbox.
6. Click the **Save** icon.
7. Repeat the steps for each program for which you want to be able to generate degree evaluations using WebCAPP.

Banner form



Steps

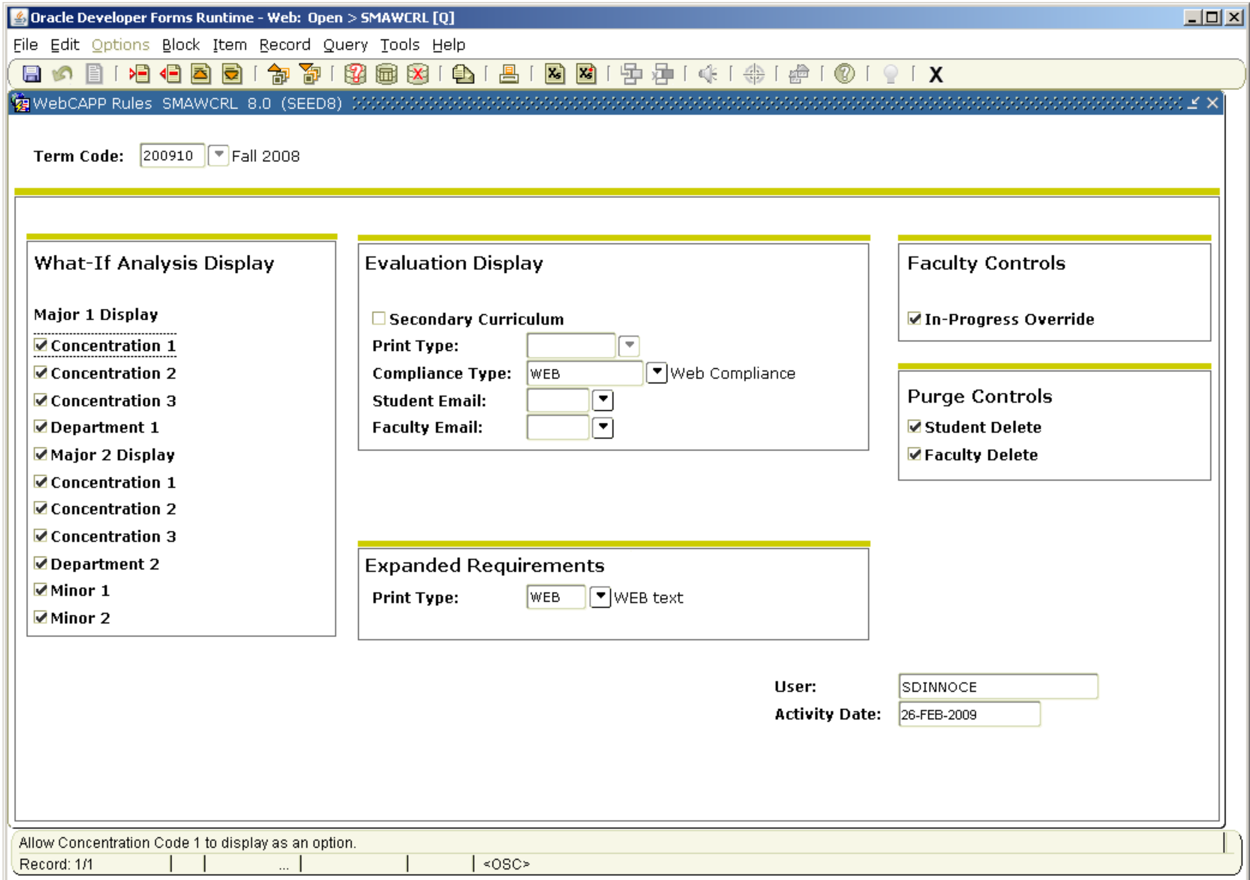
Follow these steps to complete the process of permitting degree evaluations.

1. Access the Curriculum Rules Form (SOACURR).

2. Make sure that a record exists and that the **Lock** checkbox is clicked.

3. On the Module Control tab, select the **On** radio button for **Curr, Advising, & Prog Planning**.

Banner form



Steps

Follow these steps to set WebCAPP rules for evaluation requests.

1. Access the WebCAPP Rules Form (SMAWCRL).
2. Enter your term in the **Term Code** field.
3. Under the **What-if Analysis Display**:
   - Select the curriculum components that you want to allow students to run degree evaluations against. Major 1 is always required and therefore is not included as a selection.

4. Under the **Evaluation Display**:

   - For Secondary Curriculum
   - For Print Type/Compliance Type

     The external code should be a print type code entered on STVPRNT. The text associated with this print type is displayed in various areas on the General Requirements page and Detail Requirements page.

     If no code is designated, no text will be printed.

     You can enter a compliance type from STVCPRT. If the compliance type is entered, two types of text can be displayed for the program, area, or group: *Met* and *Unmet*.

   - For Faculty Email Type

     This external code should be a valid e-mail type on GTVEMAL. The e-mail address associated with this code (that is, active) and marked as Preferred and Display on Web on GOAEMAL will be displayed.

   - For Student Email Type

     This external code should be a valid e-mail type on GTVEMAL. The e-mail address associated with this code (that is, active) and marked as Preferred and Display on Web on GOAEMAL will be displayed.

5. Under the **Expanded Requirements**:

   - For Print Type

     This code should be used to determine the text to display for educational plan. Select **Search** for this field to display the Compliance Print Code Validation (STVPRNT) list.

6. Under the **Faculty Controls**:

   - In-Progress Override

     This checkbox is used to indicate whether faculty members or advisors can override the default in-progress course usage setting, which is specified on the Compliance Default Parameters Form (SMADFLT).

7. Under the **Purge Controls**:

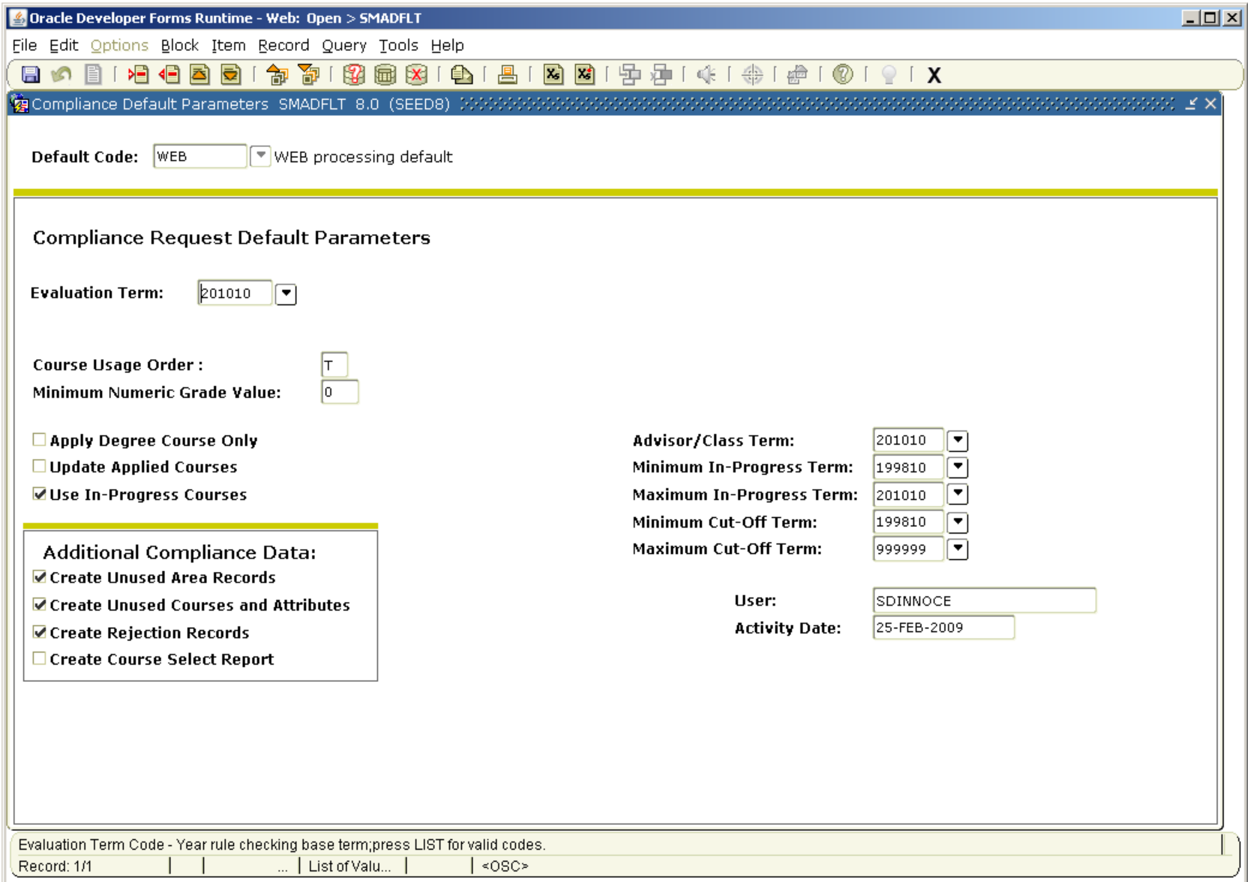
- Student Delete

This indicator is used to specify whether a student can delete degree evaluations that he or she ran.

8. Click the **Save** icon.

9. Click the **Exit** icon.

Banner form



Steps

Follow these steps to set the compliance default parameters for the WebCAPP process.

1. Access the CAPP Compliance Default Parameter Form (SMADFLT).

2. Enter the default code in the **Default Code** field.

3. Select the **Next Block** function.

4. Enter the term you have been using in other lessons in the **Evaluation Term** field.

5. Enter the code for the order in which you want courses or course attributes to be processed in the **Course Usage Order** field.

   Note: You have three choices: *C* = Chronological Term Order, *T* = Descending Term, *G* = Descending Grade (default).

6. 6. Enter the lowest numeric grade value allowed for courses or course attributes brought in for consideration for compliance in the **Minimum Numeric Grade Value** field.

   Note: You can use this field, for example, to restrict withdrawals or courses taken for audit from being considered for compliance.

7. Select these checkboxes as appropriate for your institution: **Apply Degree Courses Only, Update Applied Courses**.

   Note: Refer to the *Using Curriculum, Advising, and Program Planning with Banner Student* handbook for details on how these checkboxes work.

8. If you want Banner to create output records for unused areas when a degree evaluation is run, click the **Create Unused Area Records** checkbox.

9. If you want to create output records for unused courses or course attributes when a degree evaluation is run, click the **Create Unused Course/Attributes** checkbox.

10. If you want Banner to create output records for rejected courses or course attributes when a degree evaluation is run, click the **Create Rejection Records** checkbox.

11. If you want Banner to create the Compliance Course/Attribute Selection Report (SMRCMPL) when a degree evaluation is run, click the **Create Course Select Report** checkbox.

12. Enter the term code for the system to use when selecting the student classification and advisor information for hardcopy output in the **Advisor/Class Term** field.

13. Enter the earliest term from which in-progress courses will be selected for consideration by the system for a degree evaluation in the **Minimum In-Progress Term** field.

14. Enter the latest term from which in-progress courses will be selected for consideration by the system for a degree evaluation in the **Maximum In-Progress Term** field.

15. Enter the earliest term from which any (in-progress, academic history, or transfer) courses will be selected for consideration by the system for a degree evaluation in the **Minimum Cut-Off Term** field.

    Note: The term entered must be the same as or earlier than the maximum cut-off term.

16. Enter the latest term from which any (in-progress, academic history, or transfer) courses will be selected for consideration by the system for a degree evaluation

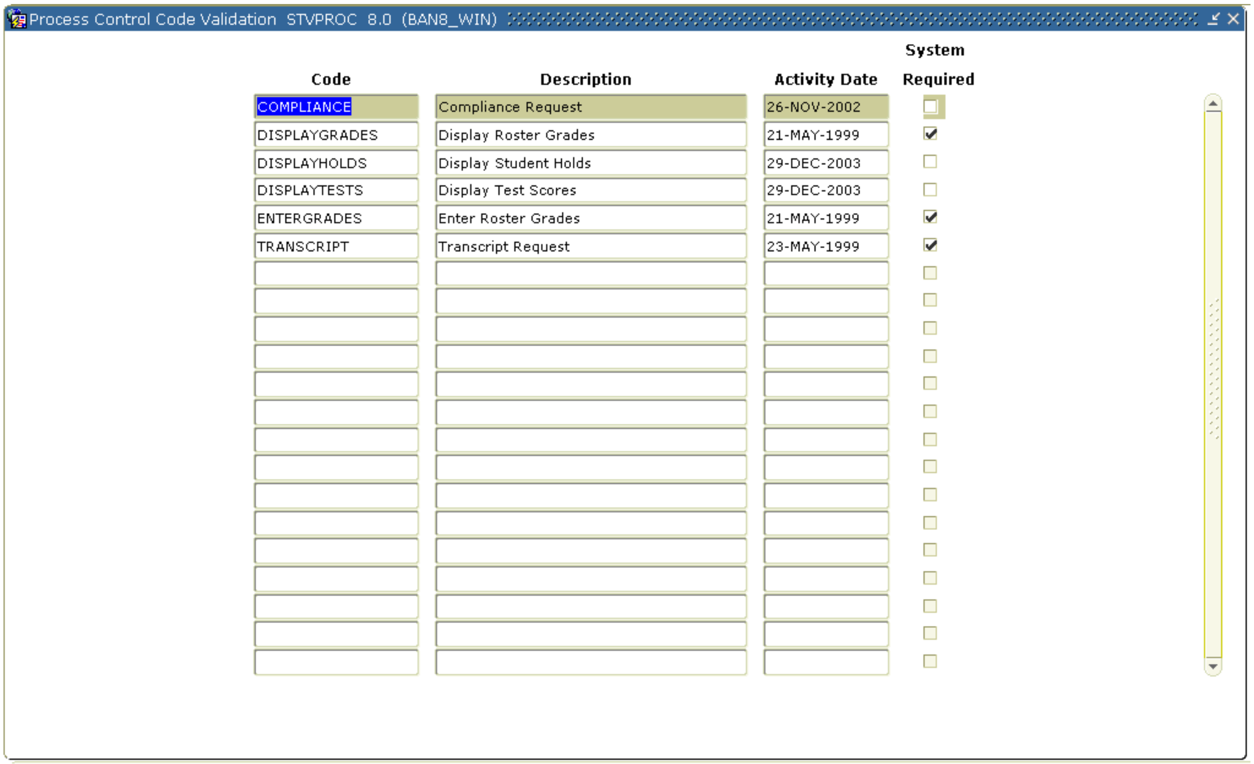
in the **Maximum Cut-Off Term** field.

Steps

Follow these steps to define default values for degree evaluations using the table on the previous pages.

1. Access the Compliance Default Parameter Form (SMADFLT).
2. Enter *WEB* in the **Default Code** field. This value is defined on the Compliance Default Codes Validation Form (STVDFLT) and is required by the system.
3. Perform a **Next Block** function.
4. Enter values in the fields as indicated in the table above.

Banner form

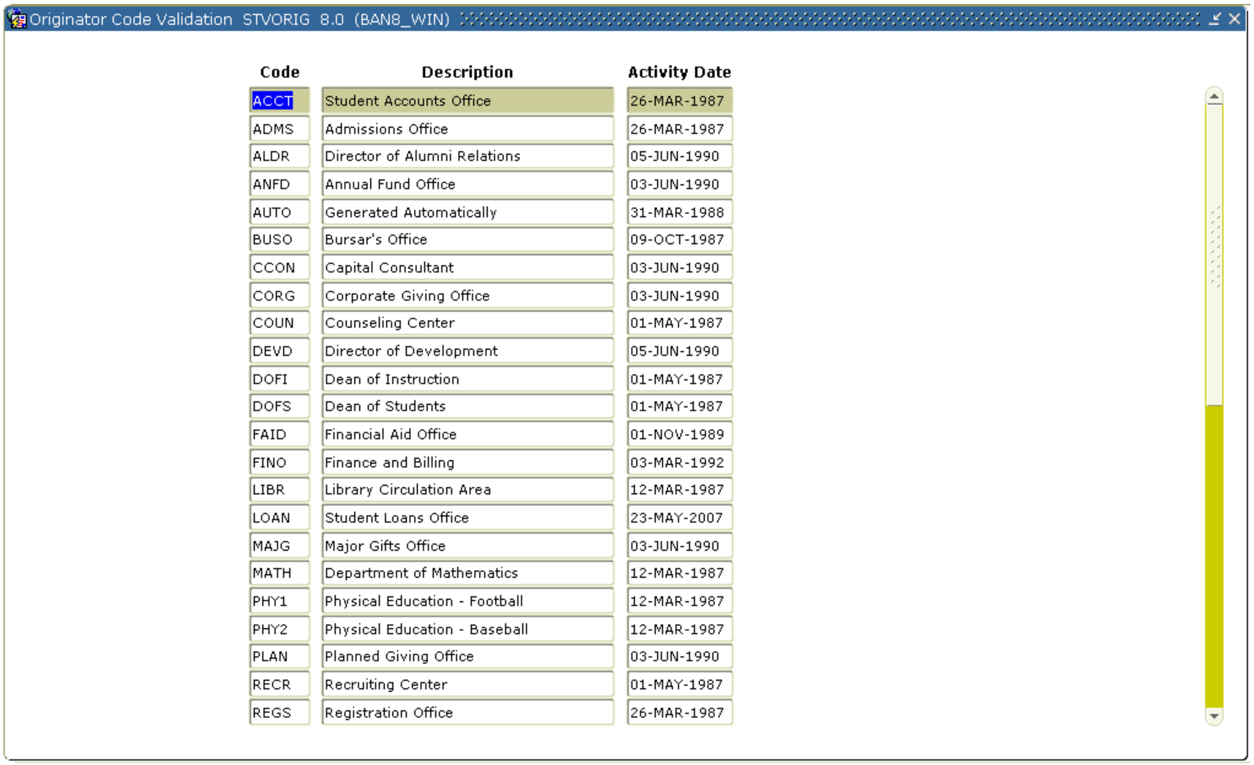


Steps

Follow these steps to create the compliance process.

1. Access the Process Control Code Validation Form (STVPROC).
2. Enter *COMPLIANCE* in the **Code** field.
3. Enter *Compliance Request* in the **Description** field.
4. Click the **Save** icon.

Banner form



Originator Code Validation STVORIG 8.0 (BAN8_WIN)

Code	Description	Activity Date
ACCT	Student Accounts Office	26-MAR-1987
ADMS	Admissions Office	26-MAR-1987
ALDR	Director of Alumni Relations	05-JUN-1990
ANFD	Annual Fund Office	03-JUN-1990
AUTO	Generated Automatically	31-MAR-1988
BUSO	Bursar's Office	09-OCT-1987
CCON	Capital Consultant	03-JUN-1990
CORG	Corporate Giving Office	03-JUN-1990
COUN	Counseling Center	01-MAY-1987
DEVD	Director of Development	05-JUN-1990
DOFI	Dean of Instruction	01-MAY-1987
DOFS	Dean of Students	01-MAY-1987
FAID	Financial Aid Office	01-NOV-1989
FINO	Finance and Billing	03-MAR-1992
LIBR	Library Circulation Area	12-MAR-1987
LOAN	Student Loans Office	23-MAY-2007
MAJG	Major Gifts Office	03-JUN-1990
MATH	Department of Mathematics	12-MAR-1987
PHY1	Physical Education - Football	12-MAR-1987
PHY2	Physical Education - Baseball	12-MAR-1987
PLAN	Planned Giving Office	03-JUN-1990
RECR	Recruiting Center	01-MAY-1987
REGS	Registration Office	26-MAR-1987

Steps

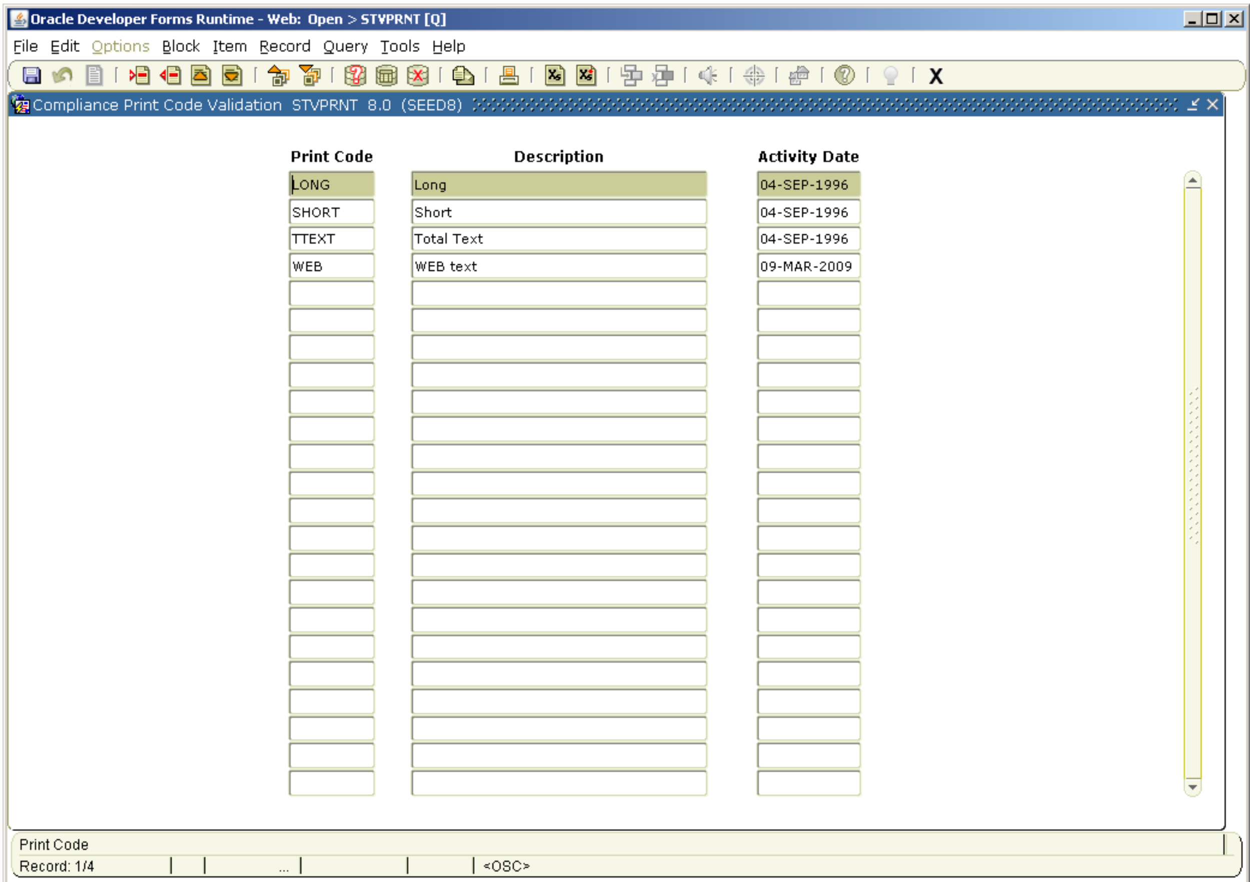
Note: You must create a "Web" value to indicate the originator of a compliance request on STVORIG. This information will be recorded on the Compliance Request Management Form (SMARQCM).

For more information about SMARQCM, see the *Using Curriculum, Advising and Program Planning with Banner Student* handbook.

Follow these steps to create an originator.

1. Access the Originator Code Validation Form (STVORIG).
2. Enter *WEB* in the **Code** field. (If you do not see a blank row, use **Insert Record** to create one).
3. Enter *WebCAPP* in the **Description** field.
4. Click the **Save** icon.

Banner form



Steps

Note: Print codes can be assigned to text in various places for CAPP requirements, such as *Requirement Met Text*, *Met but do not Print*, *Total Text Requirement*, and so on.

Follow these steps to create a print code.

1. Access the Compliance Print Code Validation Form (STVPRNT).
2. In the **Print Code** field, enter *WEB*.
3. In the **Description** field, enter *Web Text*.
4. Click the **Save** icon.

WEBCURR GTVSDAX Entries

The internal code of WEBCURR uses this hierarchy to determine where and in what order to retrieve the current curriculum record:

1 = DEG: Degree record on the Degree and Other Formal Awards Form (SHADEGR)

2 = GST: General student record on the General Student Form (SGASTDN)

3 = ADM: Applicant record on the Admissions Application Form (SAAADMS)

4 = REC: Recruiting record on the Recruiting Prospect Information Form (SRARECR)

The sequence number (1, 2, 3, or 4) associated with the external code determines the order in which records will be displayed on the Current Curriculum page (the first page of the Degree Evaluation option).

For example, if DEG is specified for sequence 1, the Degree record will be displayed first. If DEG is sequence 1 and the student does not have a Degree record, the system looks for the record type specified for sequence 2; if that record does not exist for sequence 2, it goes on to the next sequence number, and so on. If no record is found, the "No Curriculum Record Found" message will be displayed.

Each of the four **Sequence** fields must have a value. If you want to have only one record be used (for example, the Degree record) enter the associated external code for that record for all four sequence numbers or enter an unknown value, such as *xxx* in the other three. If the record(s) in the hierarchy do not exist, the "No Curriculum Record Found" message is displayed.

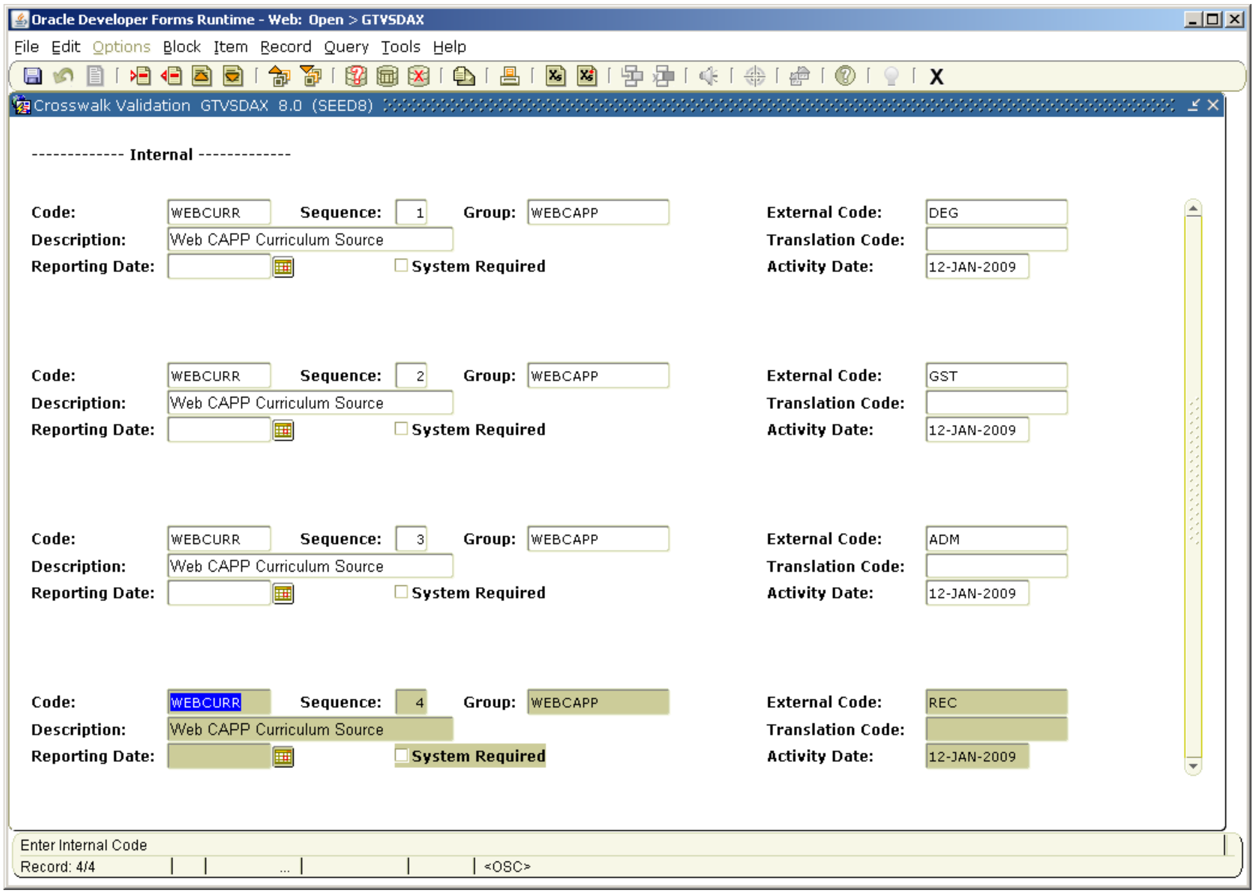
Steps

1. Access the Crosswalk Validation Form (GTVSDAX).
2. These values must be entered on the form:

Field	Value
Internal Code	WEBCURR
Internal Sequence	1
Internal Group	WEBCAPP
External Code	DEG
Description	WebCAPP Curriculum Source
System Required	Not Selected
Internal Code	WEBCURR
Internal Sequence	2
Internal Group	WEBCAPP
External Code	GST
Description	WebCAPP Curriculum Source
System Required	Not Selected
Internal Code	WEBCURR
Internal Sequence	3
Internal Group	WEBCAPP
External Code	ADM
Description	WebCAPP Curriculum Source
System Required	Not Selected
Internal Code	WEBCURR
Internal Sequence	4

Field	Value
Internal Group	WEBCAPP
External Code	REC
Description	WebCAPP Curriculum Source
System Required	Not Selected.

Banner form



Steps

Follow these steps to define the Crosswalk Validation Form (GTVSDAX) settings using the tables on the previous pages.

1. Access the Crosswalk Validation Form (GTVSDAX).
2. Select Insert from the **Record** menu.

3. Enter values for each of these fields: **Internal Code**, **Internal Sequence**, **Internal Group**, **External Code**, **Description**, and **System Required**. (Use the values shown in the tables above).

4. Click the **Save** icon.

5. Repeat steps 1-4 for each rule.

Setting Up the Graduation Application on the Web

Introduction

The Self-Service Graduation Application functionality allows users to create and update degree information in academic history via the web. Students who are eligible may apply to graduate or complete a course of study. Your institution may choose whether to allow students to create or update degree and diploma information.

You must define who is eligible to submit an application to complete a degree based on existing outcome or learner curriculum(a) and also specify when applications may be submitted. Your institution must also determine what information to display to the student and define which degree or diploma data you wish to collect from the self-service graduation application.

A self-service process to initiate the application to complete a degree provides functionality in the area of graduation processing for deans, registrars, advisors and other administrators. A separate process to control creation of the outcome records streamlines and assists with manual corrections of final degree records. Students may also view any active graduation applications they may have.

To set up the Graduation Application on the web, the tasks on this brief checklist must be completed. Details on each follow on subsequent pages.

1. Define your graduation application eligibility rules on the Graduation Application Eligibility Rules form (SHAGELR).

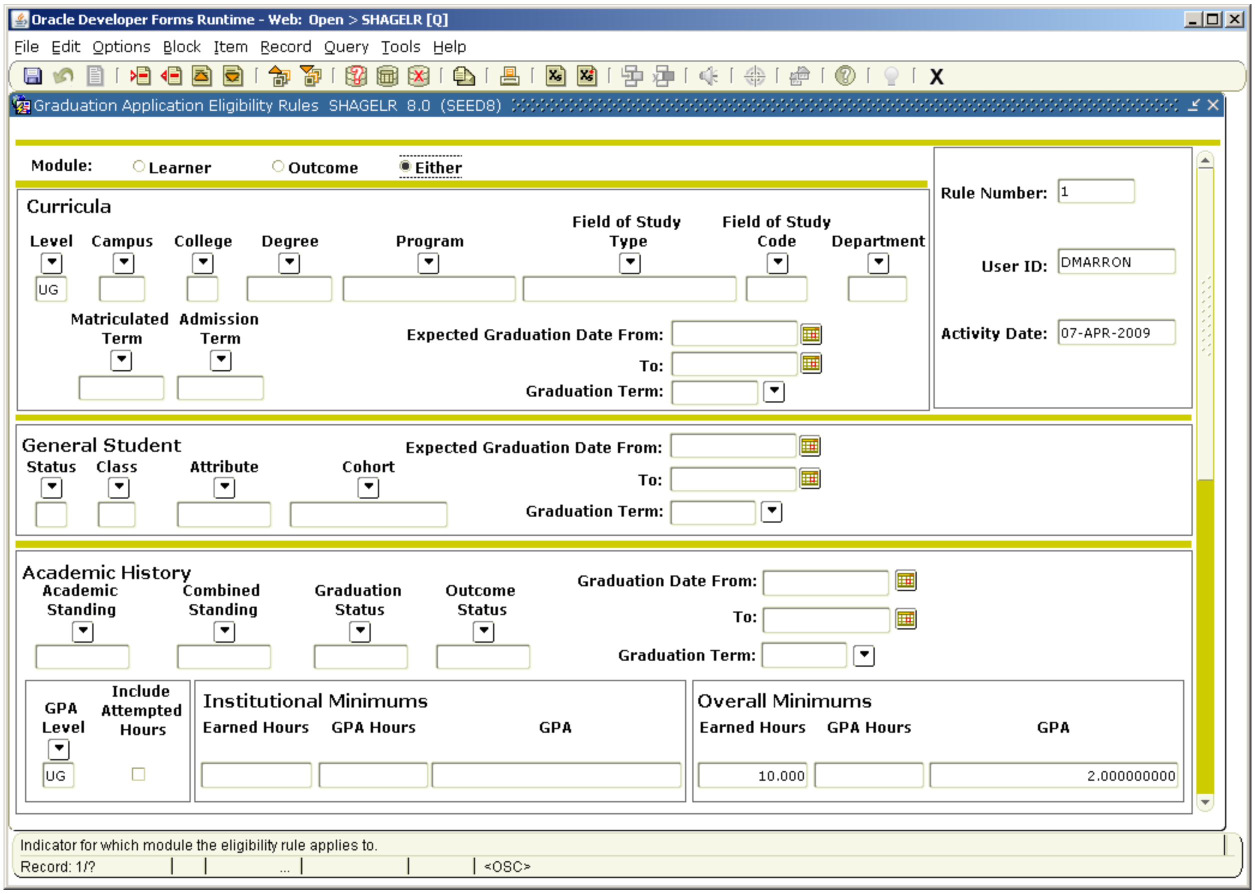
2. Define your application status codes on the Graduation Application Status Validation form (STVGAST), being sure to select the **Web Indicator** checkbox for each application status code you wish to be available on the Web.

3. Define the display rules codes for your graduation applications on the Graduation Application Display Rules Code Validation form (STVGADR).

4. Define the rules that assign display selection codes to students based on curricula data on the Graduation Application Selection Display Rules form (SHAGADS).

5. Define the graduation application display rules on the Self-Service Graduation Application Display Rules form (SHAGADR). Add the diploma name and address information for the rule.

Banner form



Steps

Follow these steps to **define the graduation application eligibility rules**.

1. Access the Graduation Application Eligibility Rules form (SHAGELR).
2. In the **Module** radio group, select the module on the curriculum record that is associated with the eligibility rule.
3. Note: Choices are *Learner*, *Outcome*, and *Either*.
4. Observe the setting of the Rule Number. This is the number of the eligibility rule, and is display only.
5. Observe the User ID field. This is the ID of the user who last updated this record. This field is display only.
6. Observe the Activity Date field. This is the date the record was last updated. This field is display only.

7. Navigate to the Data Block.

   Note: Use this block to set up curriculum, general student, academic history, level GPA and level minimum hours data for the graduation application eligibility rule matching.

8. Navigate to the Curricula Information.

9. Enter the level code into the **Level** field.

10. Enter the campus code into the **Campus** field.

11. Enter the college code into the **College** field.

12. Enter the degree code into the **Degree** field.

13. Enter the program code into the **Program** field.

14. Enter the field of study type code into the **Field of Study Type** field.

15. Enter the field of study code into the **Field of Study Code** field.

16. Enter the department code into the **Department** field.

17. Enter the matriculated term code into the **Matriculated Term** field.

18. Enter the admission term code into the **Admission Term** field.

19. Enter the earliest date of the date range on the curriculum record in which the learner is expected to graduate into the **Expected Graduation Date From** field.

20. Enter the latest date of the date range on the curriculum record in which the learner is expected to graduate into the **To** field.

21. Enter the graduation term into the **Graduation Term** field.

22. Navigate to the General Student information.

23. Enter the student status code into the **Status** field.

24. Enter the student class code into the **Class** field.

25. Enter the student attribute code into the **Attribute** field.

26. Enter the student cohort code into the **Cohort** field.

27. Enter the earliest date of the date range on the general student record in which the learner is expected to graduate into the **Expected Graduation Date From** field.

28. Enter the latest date of the date range on the general student record in which the learner is expected to graduate into the **To** field.

29. Enter the graduation term code into the **Graduation Term** field.

30. Navigate to the Academic History information.

31. Enter the academic standing code for the highest SHRTTRM record for the curriculum into the **Academic Standing** field.

32. Enter the combined standing code for the highest SHRTTRM record for the curriculum into the **Combined Standing** field.

33. Enter the graduation status code for the highest SHRTTRM record for the curriculum into the **Graduation Status** field.

34. Enter the degree status code on the degree record desired for the outcome curriculum selected into the **Outcome Status** field.

35. Enter the earliest date of the date range on the degree record in which the learner is expected to graduate into the **Expected Graduation Date From** field.

36. Enter the latest date of the date range on the degree record in which the learner is expected to graduate into the **To** field.

37. Enter the graduation term code on the degree record for the outcome curriculum selected into the **Graduation Term** field.

38. Navigate to the Attempted Hours information.

39. Enter a GPA level code into the **GPA Level** field.

    Note: This is the code used by the eligibility rule to determine the level GPA data (SHRLGPA) to be used. This field is required when institutional or overall minimum hours are specified.

40. If in-progress courses are to be included in the institutional and overall hours calculations to determine eligibility, check the **Include Attempted Hours** checkbox.

    Note: In-progress courses are those that have not yet been rolled to history.

41. Navigate to the Institutional Minimums information.

42. Enter the minimum institutional earned hours for the level specified into the **Earned Hours** field.

43. Enter the minimum institutional GPA hours for the level specified into the **GPA Hours** field.

44. Enter the minimum institutional GPA for the level specified into the **GPA** field.

45. Navigate to the Overall Minimums information.

46. Enter the minimum overall earned hours for the level specified into the **Earned Hours** field.

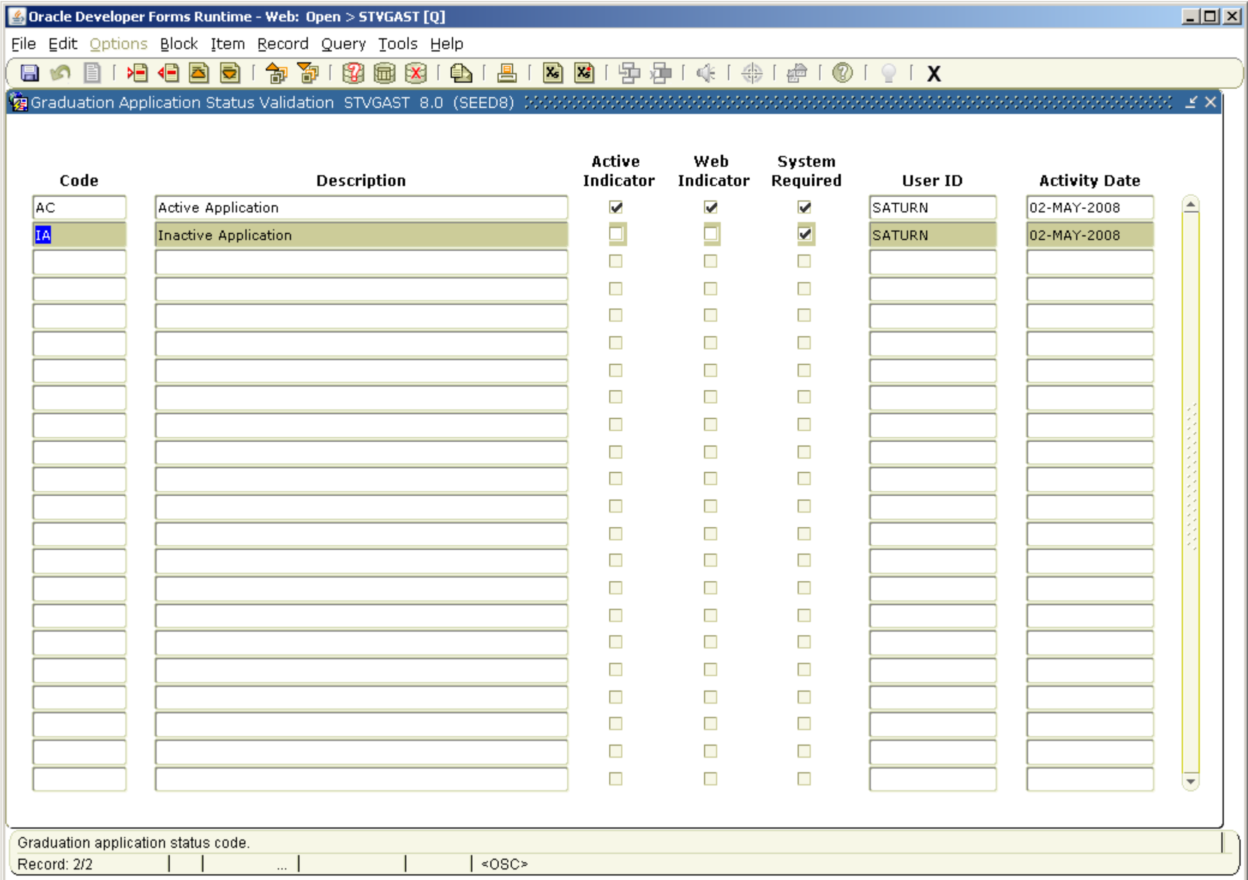
47. Enter the minimum overall GPA hours for the level specified into the **GPA Hours** field.

48. Enter the minimum overall GPA for the level specified into the **GPA** field.

49. Click on the **Save** icon.

50. Click on the **Exit** icon.

Banner form



Steps

Follow these steps to **define your application status codes**.

1. Access the Graduation Application Status Validation Form (STVGAST).
2. Enter the Graduation Application Status code into the **Code** field.
3. Enter the description of the code into the **Description** field.
4. If the graduation application with this code is active, click on the **Active Indicator** checkbox.
5. If the graduation application with this code is available in self-service, click on the **Web Indicator** checkbox.
6. If this code is required by the system, click on the **System Required** checkbox.

   Note: Once this checkbox is selected, it cannot be unchecked.

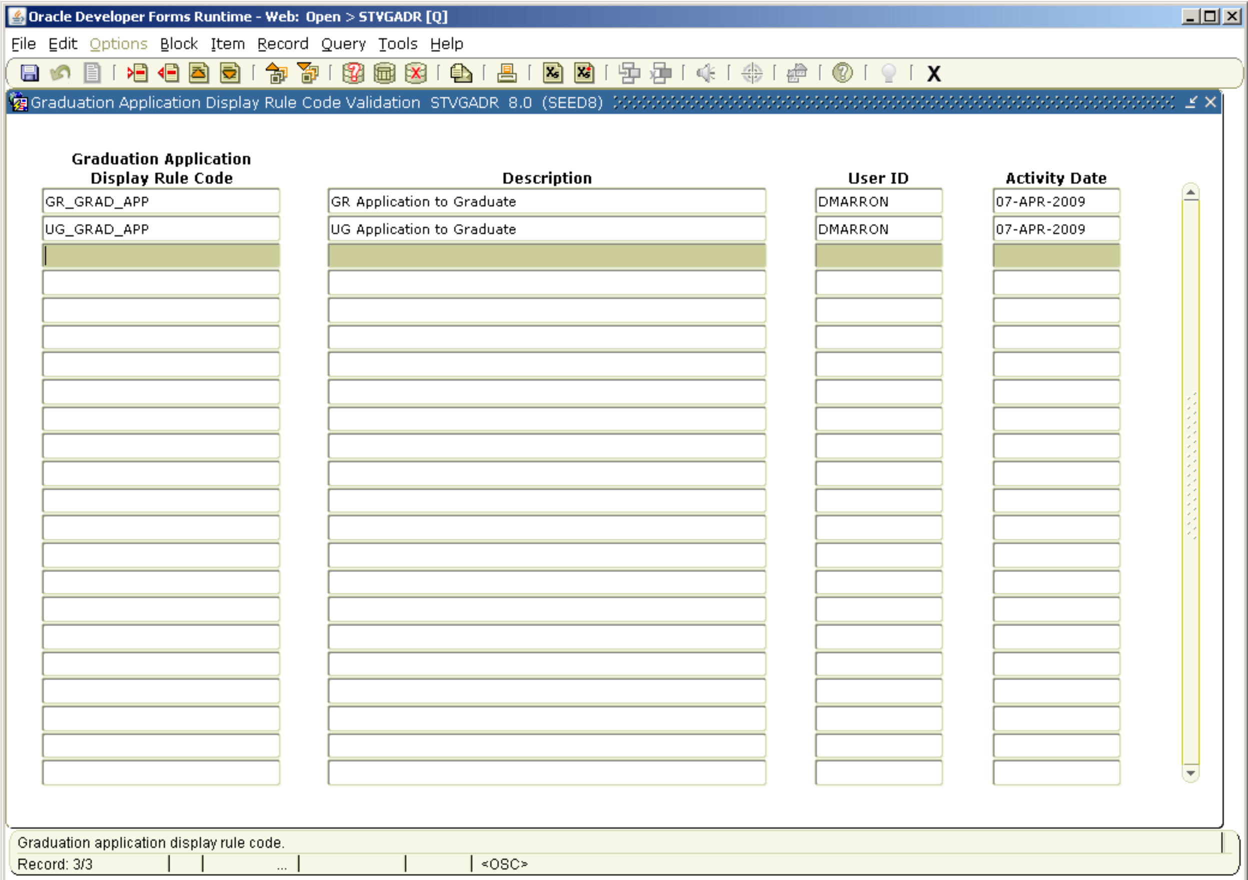
7. Observe the **User ID** field. It contains the User ID of the user who last updated the record, and is for display only.

8. Observe the **Activity Date** field. It is the date on which the record was last updated, and is for display only.

9. Click on the **Save** icon.

10. Click on the **Exit** icon.

Banner form



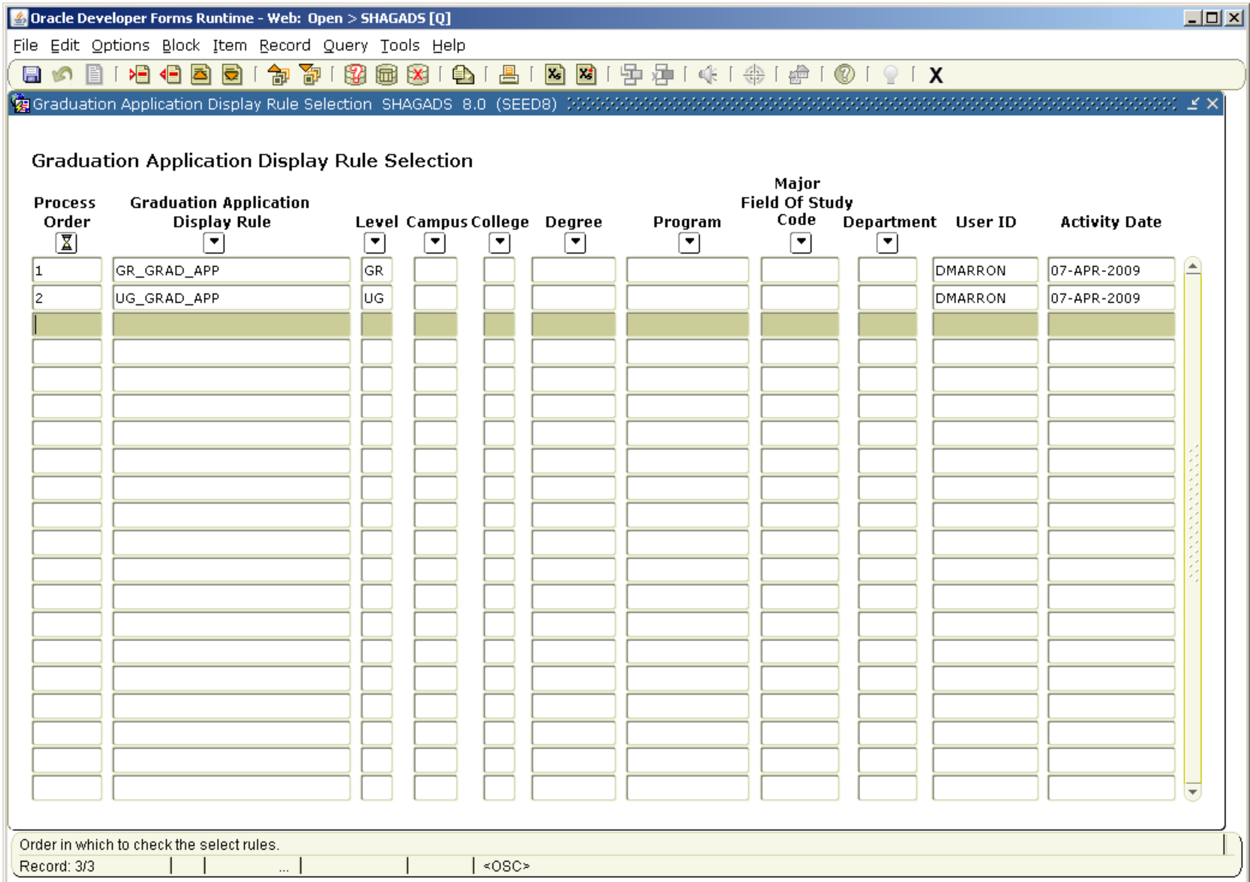
Steps

Follow these steps to define the display rules codes for your graduation applications.

1. Access the Graduation Application Display Rules Code Validation Form (STVGADR).
2. Enter the graduation application display rule code into the **Graduation Application Display Rule Code** field.
3. Enter a description of the code into the **Description** field.
4. Observe the User ID of the last user to update this code in the **User ID** field, which is for display only.
5. Observe the date of the last update to this code in the **Activity Date** field, which is for display only.
6. Click on the **Save** icon.

7. Click on the **Exit** icon.

Banner form



Steps

Follow these steps to **define the rules that assign display selection codes to students based on curricula data**.

1. Access the Graduation Application Selection Display Rules Form (SHAGADS).
2. Enter the priority order in which this selection rule will be processed into the **Process Order** field.
3. Enter the graduation application display rule code into the **Graduation Application Display Rule** field.
4. Enter the level code for the Outcome or Learner curriculum into the **Level** field.
5. Enter the campus code for the Outcome or Learner curriculum into the **Campus** field.
6. Enter the college code for the Outcome or Learner curriculum into the **College** field.

7. Enter the degree code for the Outcome or Learner curriculum into the **Degree** field.

8. Enter the program code for the Outcome or Learner curriculum into the **Program** field.

9. Enter the field of study code for the Outcome or Learner curriculum into the **Major Field of Study Code** field.

   Note: This field is always set to a major code.

10. Enter the department code for the Outcome or Learner curriculum into the **Department** field.

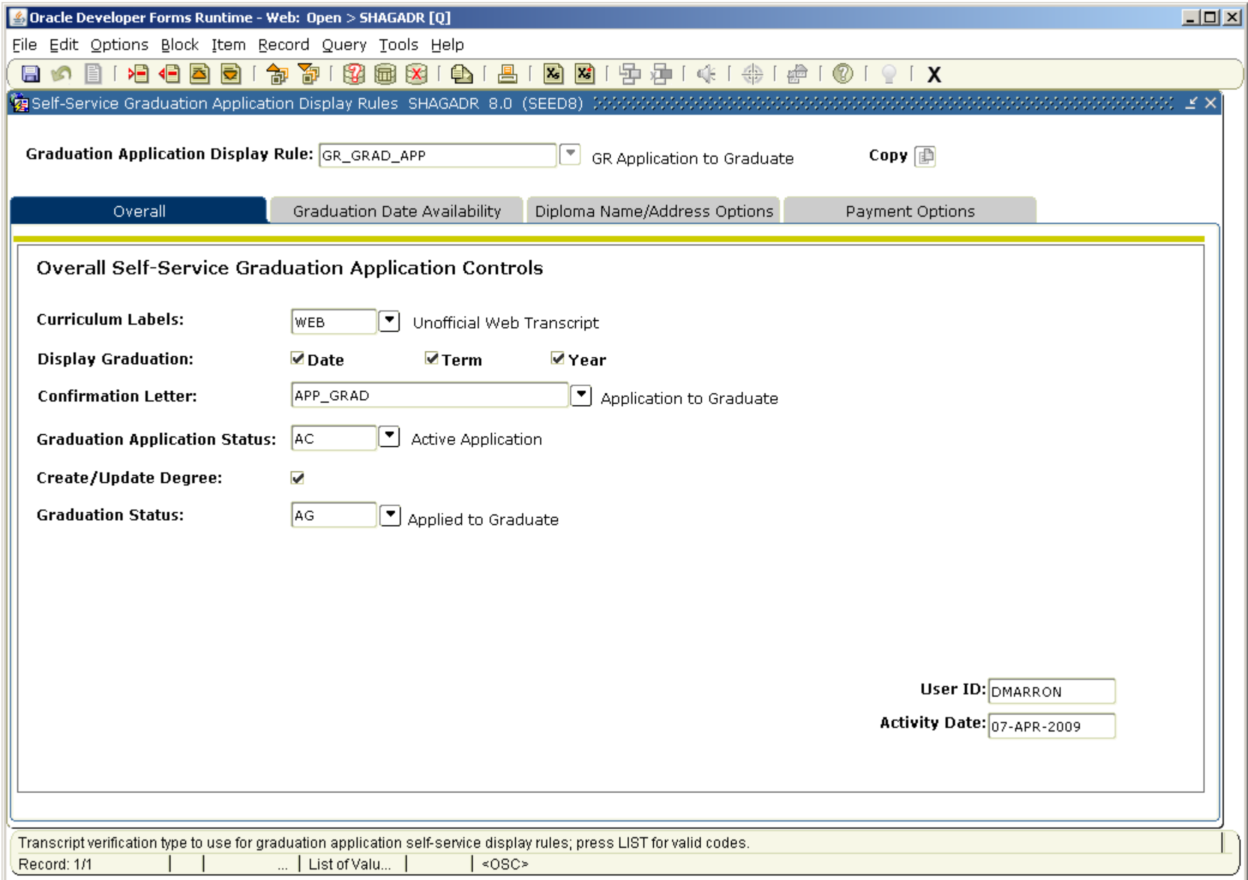
11. Observe the user ID of the last user to update this rule in the **User ID** field, which is display only.

12. Observe the date of the last time this rule was updated in the **Activity Date** field, which is display only.

13. Click on the **Save** icon.

14. Click on the **Exit** icon.

Banner form



Steps

You can specify which curriculum elements and curriculum labels will be displayed to users for selecting a curriculum for graduation. You can also specify whether a confirmation letter is displayed at the end of the application process, and which application status code and graduation status code will be used to populate the graduation application table. Finally, you can specify whether, when the application is finally submitted, the academic history tables SHRDGRMR and SHBDIPL will be updated with the information the student has entered.

Follow these steps to **set up the Overall Graduation Application Display rules**.

1. Access the Self-Service Graduation Application Display Rules form (SHAGADR)
2. Enter the graduation application display rule code in the **Graduation Application Display Rules** field.
3. Perform a **Next Block** function.
4. Enter the transcript type code in the **Curriculum Labels** field in the Overall window.

Note: The curriculum elements and labels that have been specified to be displayed for this transcript type will be used when the curriculum is displayed.

5. Select one or more of the following **Display Graduation** checkboxes (at least one must be selected):

    - Date
    - Term
    - Year

6. Select the letter code of the confirmation letter to be displayed when the application is successfully submitted.

    Note: The letter type must exist in the GTVLETR validation table, and the letter code must have been defined using the HTML Letter Rules Form (SOAELTL) and the Format HTML Letter Form (SOAELTR).

7. Enter the graduation application status code to be saved with the application when it is submitted in the **Graduation Application Status** field.

    Note: It is recommended that you use an STVGAST code for which the **Active Indicator** and the **Web Indicator** have been selected. These indicators are included on the list of values for this field.

8. Select the **Create/Update Degree** checkbox.

    Note: This results in the academic history tables SHRDGRMR and SHRDIPL being updated in addition to data in the graduation application table (SHBGAPP) being created; and if applicable, rolling the learner curriculum to outcome.

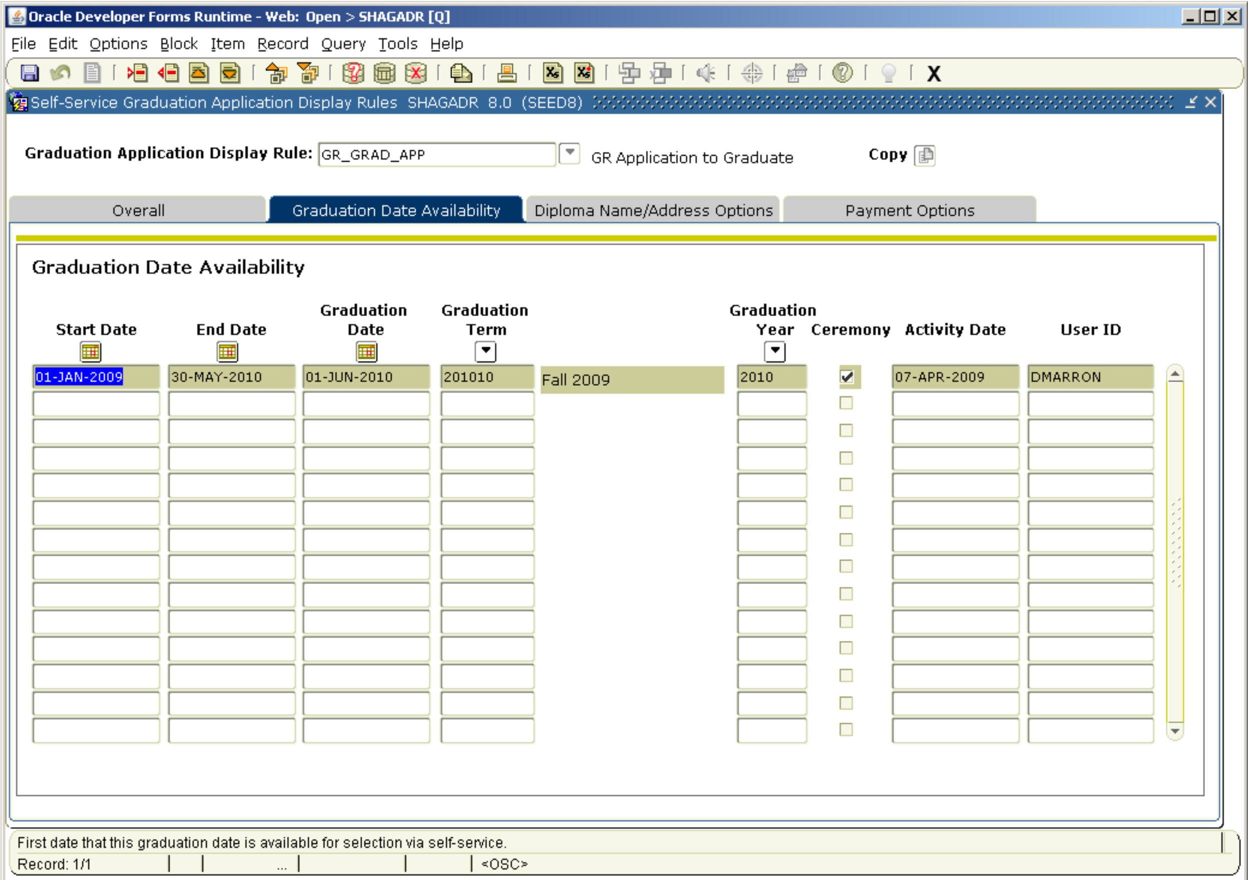
    Note: If you want to charge for graduation applications submitted via self-service, you must select this checkbox.

9. Enter the graduation status code to be used for the application when it is submitted in the **Graduation Status** field.

10. Click on the **Save** icon.

11. Click on the **Exit** icon.

Banner form



Steps

You can specifiy the date ranges in which specific graduation dates, terms, or years will be available for selecting a curriculum and graduation. You may select a graduation date, term and/or year for the student to view. You can also specify whether the system will display a radio button group for the user to indicate the intention to attend a ceremony that is associated with the graduation.

Follow these steps to **set up Graduation Date availability**.

1. Access the Self-Service Graduation Application Display Rules Form (SHAGADR).
2. Enter the graduation application display rule code in the **Graduation Appplication Display Rules** field.
3. Perform a **Next Block** function.
4. Navigate to the Graduation Date Availability tab.

5. Enter the first date this graduation rule code is available on the web in the **Start Date** field.

6. Enter the last date this graduation rule code is available on the web in the **End Date** field.

7. Enter the relevant value for the graduation that is associated with this rule code in one or more of these fields:

8. Graduation date

9. Term

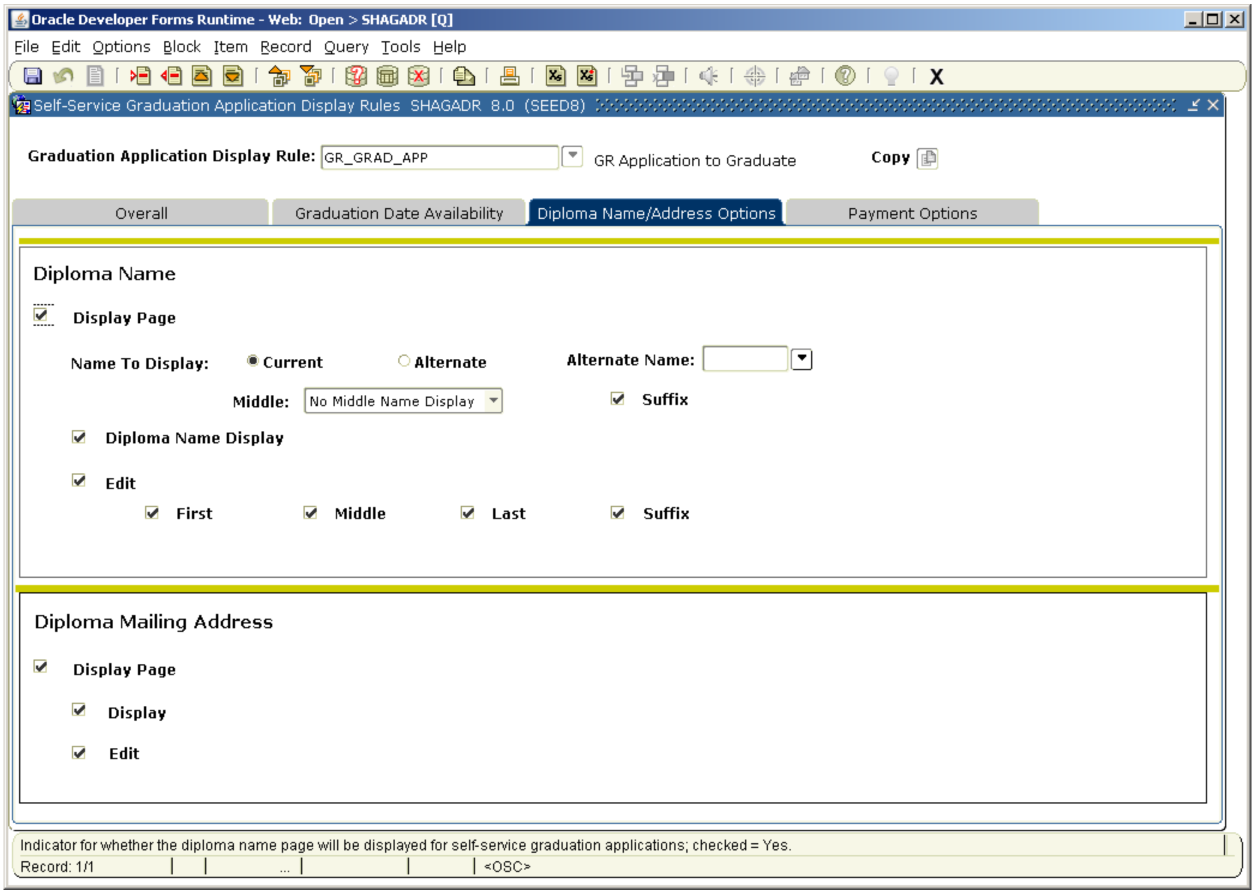
10. Year

11. If you wish to allow the user to indicate whether the student intends to attend the ceremony, select the **Ceremony** checkbox.

12. Click on the **Save** icon.

13. Click on the **Exit** icon.

Banner form



Steps

Follow these steps to **set up the diploma name selection and modification**.

1. Access the Self-Service Graduation Application Display Rules Form (SHAGADR).
2. Enter the code of the graduation application display rule in the **Graduation Application Display Rule** field.
3. Perform a **Next Block** function.
4. Click on the **Diploma Name / Address Options** tab.
5. Navigate to the Diploma Name section.
6. Select the **Display Page** checkbox to allow the Diploma Name Selection page to be displayed to students.
7. Select the **Diploma Name Display** checkbox to allow a student's name to be

displayed on the Diploma Name Selection page.

8. Choose the current SPRIDEN name to be displayed by selecting the **Current** radio button and then skip to step 11.

9. Choose an alternate SPRIDEN name to be displayed by selecting the **Alternate** radio button.

10. Specify the alternate SPRIDEN name to be displayed by selecting the alternate name type in the **Alternate Name** field.

11. Specify the middle name to be displayed by selecting the middle name from the **Middle** field.

12. Select the **Suffix** checkbox to display a student's suffix.

13. If you want to allow students to make any changes to the name to be printed on the diploma, go to step 14. Otherwise, skip to step 16.

14. Select the **Edit** checkbox to allow the value *New* to be included as a choice on the Self-Service Graduation Application on the Diploma Name Selection page.

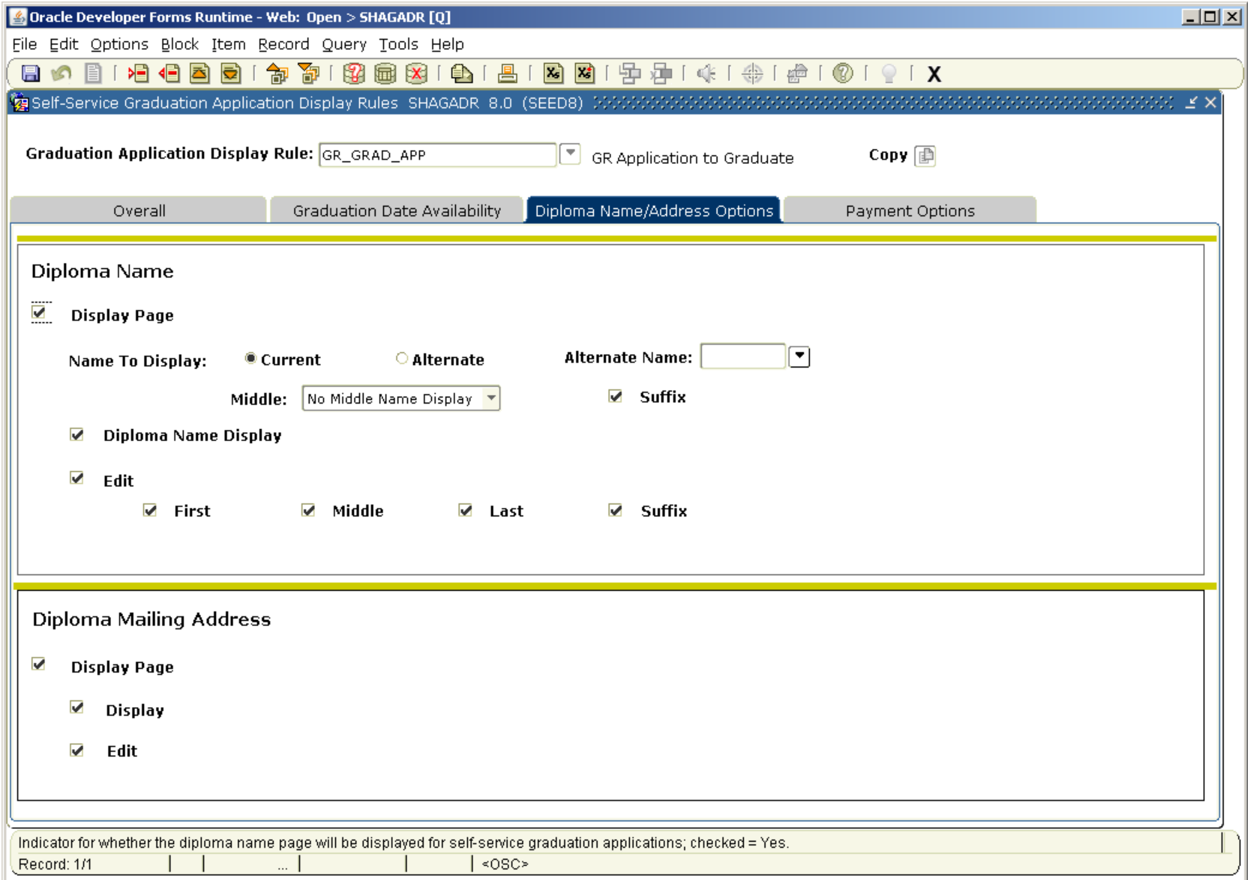
15. Select the checkboxes for each of the parts of the name you wish students to be able to change. The choices are: *First*, *Middle*, *Last* and *Suffix*.

    Note: This specifies which fields will be displayed on the Diploma Name Selection – Name Change page.

16. Click on the **Save** icon.

17. Click on the **Exit** icon.

Banner form



Steps

Follow these steps to **set up diploma mailing address selection and modification**.

1. Access the Self-Service Graduation Application Display Rules Form (SHAGADR).
2. Enter the code of the graduation application display rule in the **Graduation Application Display Rule** field.
3. Perform a **Next Block** function.
4. Click on the **Diploma Name / Address Options** tab.
5. Navigate to the Diploma Mailing Address section.
6. To display the Diploma Mailing Address Selection page to students, select the **Display Page** checkbox.
7. To display the address currently associated with the diploma record, select the **Display** checkbox.

8. To allow the students to change the address to which the diploma is to be mailed, select the **Edit** checkbox.

   Note: The value *New* is then included in the choices for the address selection on the Diploma Mailing Address Selection page.

9. Click on the **Save** icon.

10. Click on the **Exit** icon.

Setting up Personal Information

Introduction

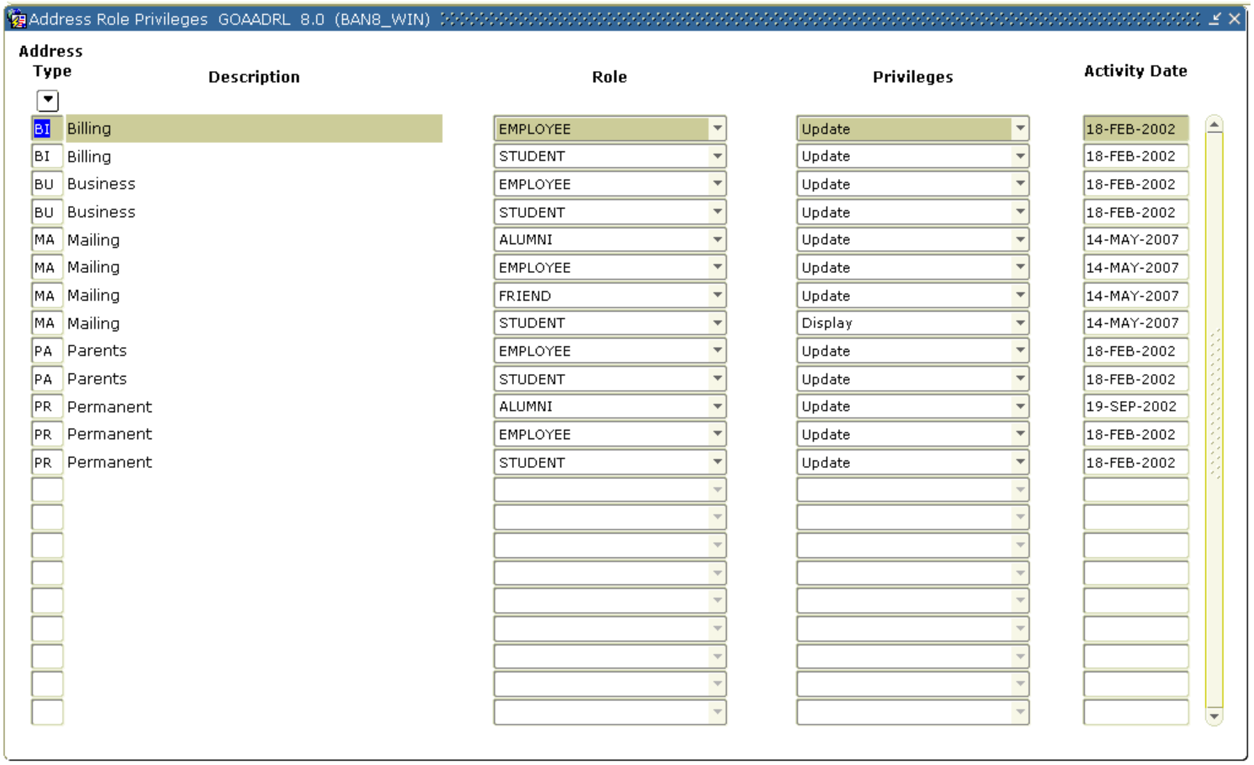
Students have access to the Personal Information Menu. Pages in this menu are actually part of the Self-Service for General product, and so users of all Banner Self-Service products automatically have access to these pages.

From this menu, a student can

- change the pin
- change the login verification question
- view and update the current address, telephone, and e-mail information
- view the Directory Profile
- view and update emergency contact information
- update marital status
- respond to surveys
- find information regarding institutional policies on updating name information
- find information on how to modify U.S. Social Security information.

This section describes the set up procedures for displaying information on the personal information menu.

Banner form



Address Role Privileges GOAADRL 8.0 (BAN8_WIN)

Address Type	Description	Role	Privileges	Activity Date
BI	Billing	EMPLOYEE	Update	18-FEB-2002
BI	Billing	STUDENT	Update	18-FEB-2002
BU	Business	EMPLOYEE	Update	18-FEB-2002
BU	Business	STUDENT	Update	18-FEB-2002
MA	Mailing	ALUMNI	Update	14-MAY-2007
MA	Mailing	EMPLOYEE	Update	14-MAY-2007
MA	Mailing	FRIEND	Update	14-MAY-2007
MA	Mailing	STUDENT	Display	14-MAY-2007
PA	Parents	EMPLOYEE	Update	18-FEB-2002
PA	Parents	STUDENT	Update	18-FEB-2002
PR	Permanent	ALUMNI	Update	19-SEP-2002
PR	Permanent	EMPLOYEE	Update	18-FEB-2002
PR	Permanent	STUDENT	Update	18-FEB-2002

Steps

Follow these steps to set up an address type rule.

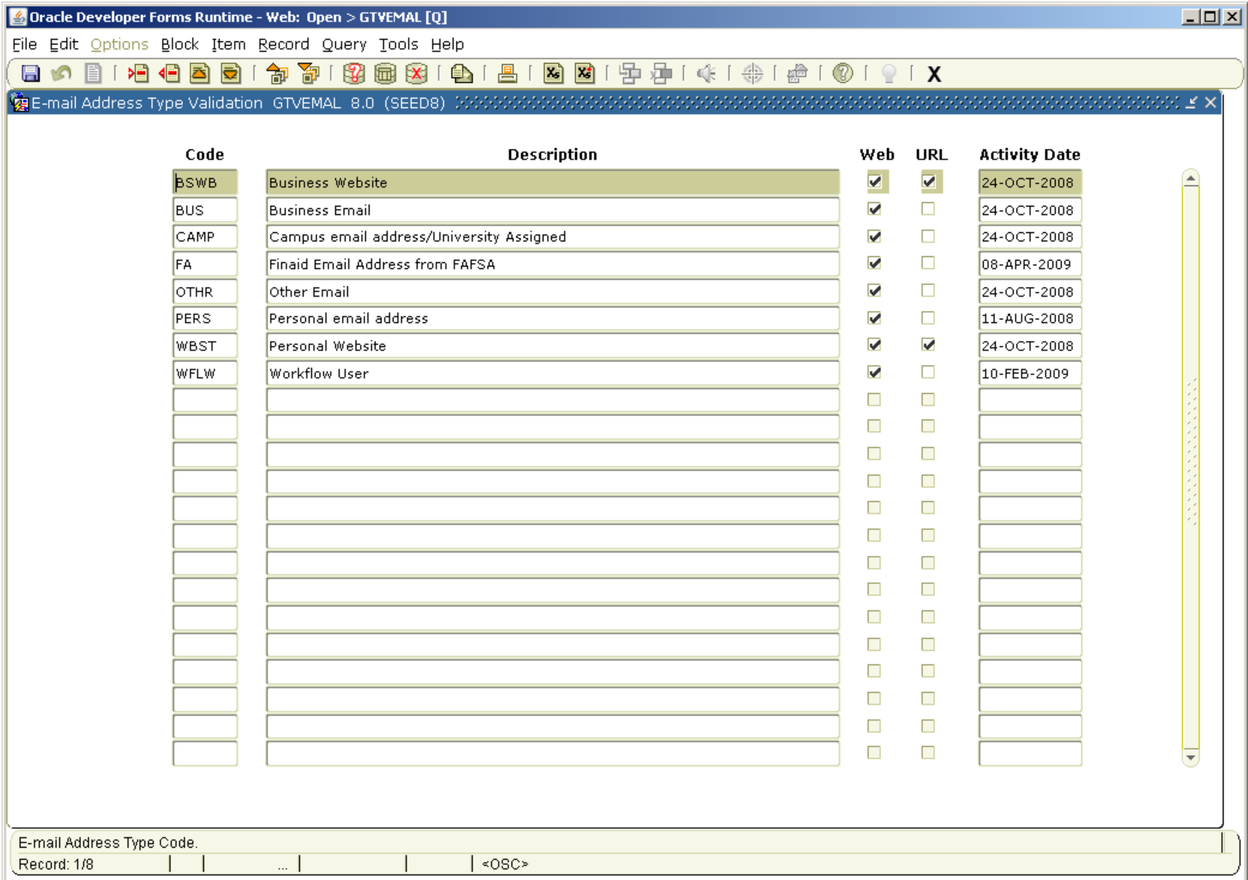
1. Access the Address Role Privileges Form (GOAADRL).

2. Enter a new rule by selecting an address type, Web user role, and privilege.

   Note: If a user has more than one role, all rules for a specific address type associated with the user's roles will be examined, and the user will be allowed the highest of the privileges as specified by the rules.

Field	Value
Address type	The address type for which you are creating a rule. You can create only one rule per Web user role for an address type. However, you can create a separate rule for a different Web user role. For example, you can create one rule for the Address Type of “MA-Mailing” for the role of FACULTY and another rule for “MA-Mailing” for the role of STUDENT. However, you cannot create two rules for “MA-Mailing” that both have the role of STUDENT.
Role	Web user role affected by the rule. Remember that a Web user may be assigned more than one role. For example, a student who is employed at your institution may have both the role of STUDENT and the role of EMPLOYEE. In this case, rules for both roles will apply to the person.
Privileges	The type of viewing and updating privileges students and faculty should have. U = Update. Users can update their addresses. D = Display only. Users can see, but not update, their addresses. N = None. Users can neither see nor update their addresses.

Banner form



Oracle Developer Forms Runtime - Web: Open > GTVEMAL [Q]

File Edit Options Block Item Record Query Tools Help

E-mail Address Type Validation GTVEMAL 8.0 (SEED8)

Code	Description	Web	URL	Activity Date
BSWB	Business Website	☑	☑	24-OCT-2008
BUS	Business Email	☑	☐	24-OCT-2008
CAMP	Campus email address/University Assigned	☑	☐	24-OCT-2008
FA	Finaid Email Address from FAFSA	☑	☐	08-APR-2009
OTHR	Other Email	☑	☐	24-OCT-2008
PERS	Personal email address	☑	☐	11-AUG-2008
WBST	Personal Website	☑	☑	24-OCT-2008
WFLW	Workflow User	☑	☐	10-FEB-2009

E-mail Address Type Code.

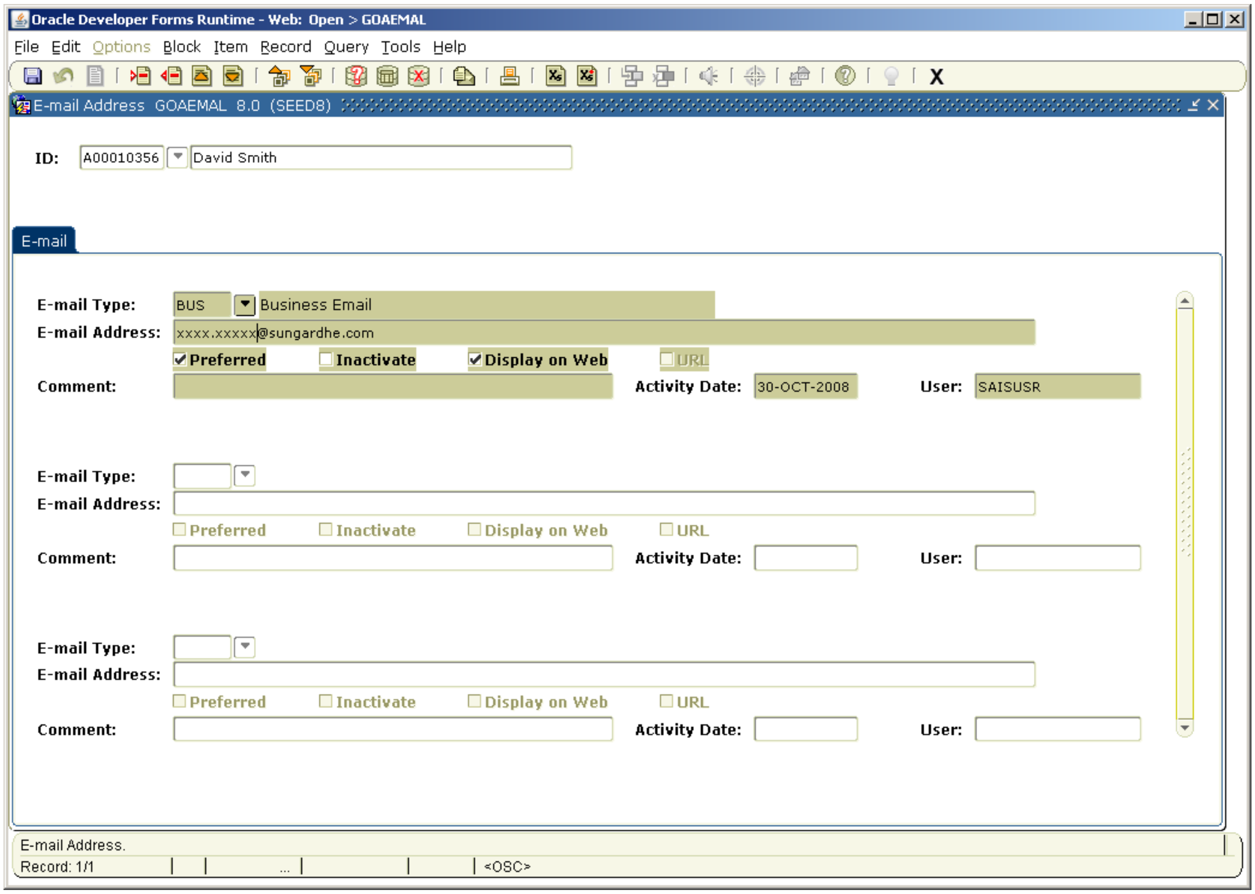
Record: 1/8 ... <OSC>

Steps

Follow these steps to Web-enable e-mail address types.

1. Access the E-mail Address Type Validation Form (GTVEMAL).
2. Enter values in the **Code** and **Description** fields.
3. Click the **Web** checkbox.
4. Click the **Save** icon.

Banner form



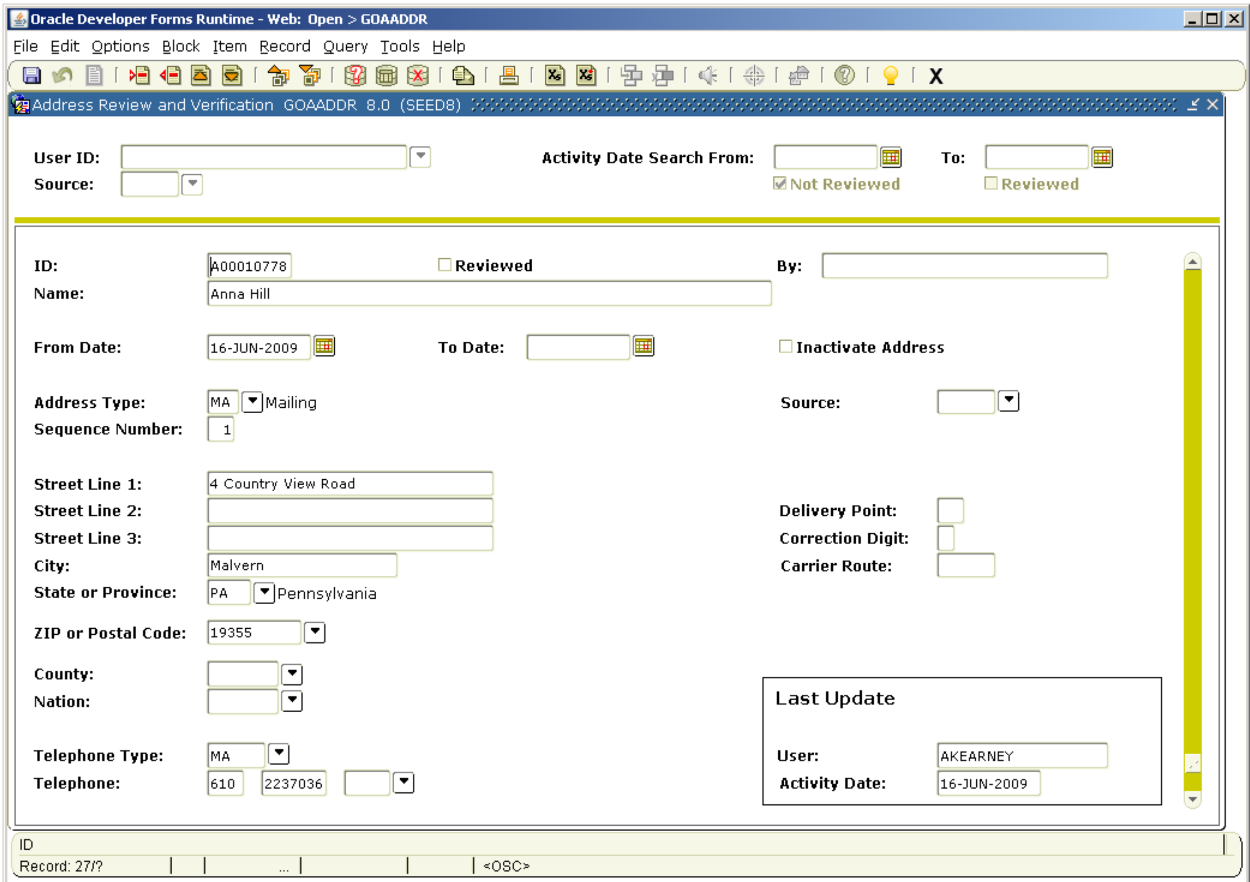
Steps

Follow these steps to verify that the student has e-mail address information.

1. Go to the E-mail Address Form (GOAEMAL).
2. Enter your student's Banner ID in the key block, then perform a **Next Block** function.
3. Click the **Preferred** checkbox.
4. Click the **Display on Web** checkbox.

   Note: If it is not selected, then the address will not appear in Self-Service for Students (or Self-Service for Faculty & Advisors) even if it is assigned a type that is Web-enabled on GTVEMAL.

Banner form



Steps

Follow these steps to review address change information entered from Self Service.

1. Access the Address Review and Verification Form (GOAADDR).
2. Enter the Banner User ID for your Web applications in the **User ID** field.

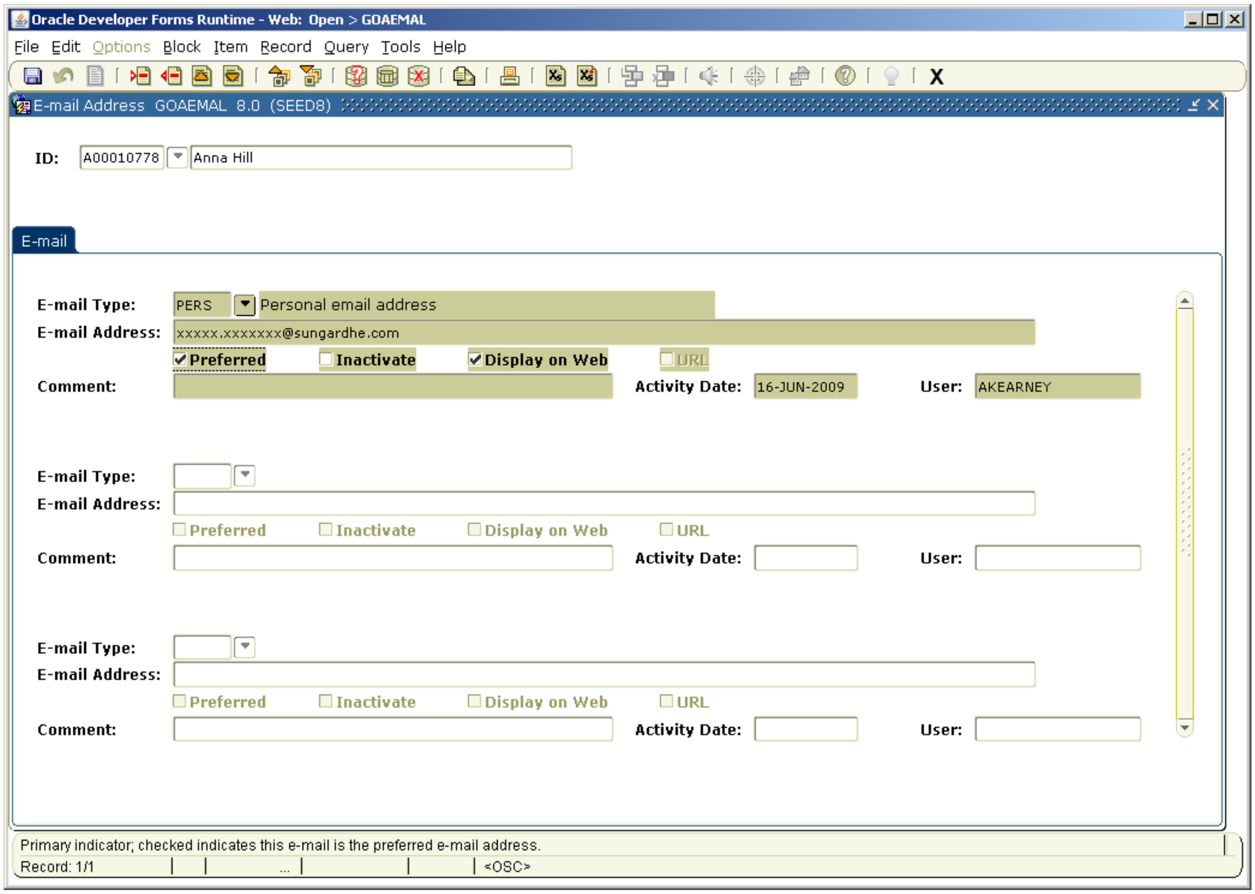
   Note: You can enter any combination of values in the key block to narrow your search results.
3. Leave the **Source** field blank.
4. Perform a **Next Block** function.

   Note: You can now see all address records for which the address or telephone number has been updated in any Banner Self-Service product.
5. You can make changes to any of the fields in the address and telephone record.

If you make a change, click the **Reviewed** checkbox.

6. Click the **Save** icon.

Banner form

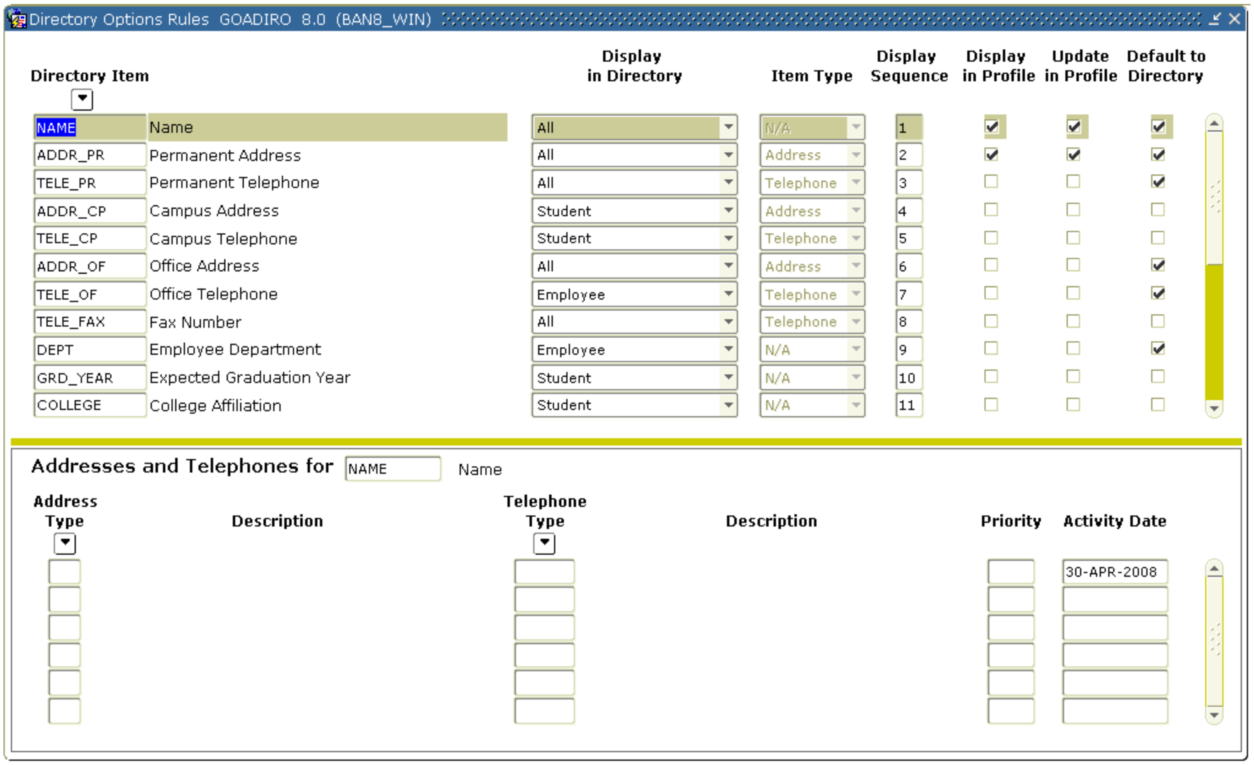


Steps

Follow these steps to review e-mail address change information.

1. Access the E-mail Address Form (GOAEMAL).
2. In the **ID** field, enter the student's Banner ID.
3. Perform a **Next Block** function.
4. You can see current e-mail address information for the student. You can also make changes, enter comments, and Web-enable (or disable) any e-mail address on this form.

Banner form



Directory Options Rules GOADIRO 8.0 (BAN8_WIN)

Directory Item		Display in Directory	Item Type	Display Sequence	Display in Profile	Update in Profile	Default to Directory
NAME	Name	All	N/A	1	☑	☑	☑
ADDR_PR	Permanent Address	All	Address	2	☑	☑	☑
TELE_PR	Permanent Telephone	All	Telephone	3	☐	☐	☑
ADDR_CP	Campus Address	Student	Address	4	☐	☐	☐
TELE_CP	Campus Telephone	Student	Telephone	5	☐	☐	☐
ADDR_OF	Office Address	All	Address	6	☐	☐	☑
TELE_OF	Office Telephone	Employee	Telephone	7	☐	☐	☑
TELE_FAX	Fax Number	All	Telephone	8	☐	☐	☐
DEPT	Employee Department	Employee	N/A	9	☐	☐	☑
GRD_YEAR	Expected Graduation Year	Student	N/A	10	☐	☐	☐
COLLEGE	College Affiliation	Student	N/A	11	☐	☐	☐

Addresses and Telephones for NAME Name

Address Type	Description	Telephone Type	Description	Priority	Activity Date
					30-APR-2008

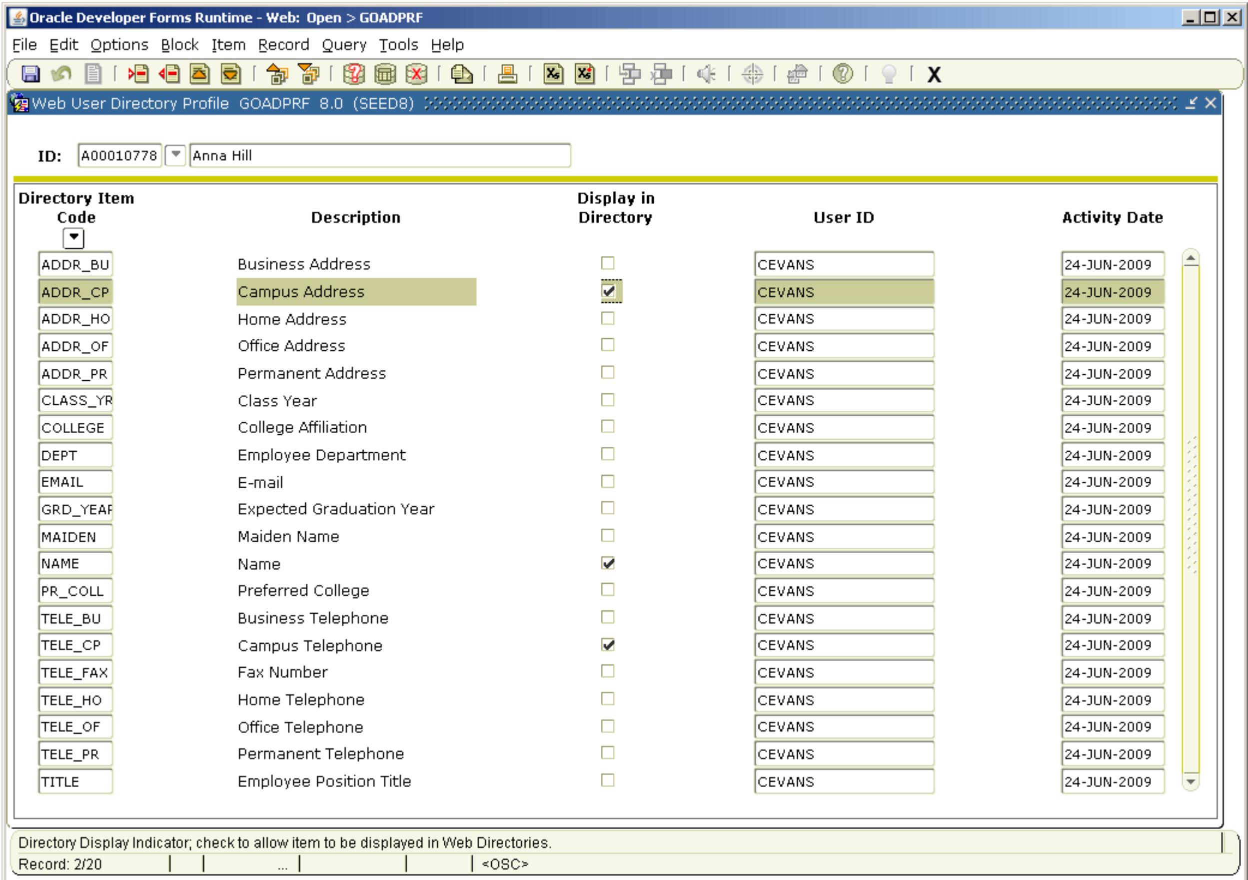
Steps

Follow these steps to set up directory profile rules.

1. Access the Directory Options Rule Form (GOADIRO).
2. Click the **Enter Query** icon.
3. Set the **Display in Directory** list to *STUDENT*.
4. Click the **Execute Query** icon to see all directory items that apply specifically to students.
5. For each directory item, click these checkboxes: **Display in Profile** and **Update in Profile**. Do not click **Default to Directory** checkbox.
6. If an item has an item type of *Address* or *Telephone*, navigate to the Address and Telephone area.
7. Click the **Save** icon.
8. Repeat steps 2-7, this time setting the **Display in Directory** list to *ALL*.

   Note: This combination of settings allows students to see information in their profile and then to determine if they wish it to appear in the Campus Directory. If you were to select the Default to Directory check box for an item, that item would automatically appear in the directory.

Banner form



Oracle Developer Forms Runtime - Web: Open > GOADPRF

File Edit Options Block Item Record Query Tools Help

Web User Directory Profile GOADPRF 8.0 (SEED8)

ID: A00010778 Anna Hill

Directory Item Code	Description	Display in Directory	User ID	Activity Date
ADDR_BU	Business Address	☐	CEVANS	24-JUN-2009
ADDR_CP	Campus Address	☑	CEVANS	24-JUN-2009
ADDR_HO	Home Address	☐	CEVANS	24-JUN-2009
ADDR_OF	Office Address	☐	CEVANS	24-JUN-2009
ADDR_PR	Permanent Address	☐	CEVANS	24-JUN-2009
CLASS_YR	Class Year	☐	CEVANS	24-JUN-2009
COLLEGE	College Affiliation	☐	CEVANS	24-JUN-2009
DEPT	Employee Department	☐	CEVANS	24-JUN-2009
EMAIL	E-mail	☐	CEVANS	24-JUN-2009
GRD_YEAR	Expected Graduation Year	☐	CEVANS	24-JUN-2009
MAIDEN	Maiden Name	☐	CEVANS	24-JUN-2009
NAME	Name	☑	CEVANS	24-JUN-2009
PR_COLL	Preferred College	☐	CEVANS	24-JUN-2009
TELE_BU	Business Telephone	☐	CEVANS	24-JUN-2009
TELE_CP	Campus Telephone	☑	CEVANS	24-JUN-2009
TELE_FAX	Fax Number	☐	CEVANS	24-JUN-2009
TELE_HO	Home Telephone	☐	CEVANS	24-JUN-2009
TELE_OF	Office Telephone	☐	CEVANS	24-JUN-2009
TELE_PR	Permanent Telephone	☐	CEVANS	24-JUN-2009
TITLE	Employee Position Title	☐	CEVANS	24-JUN-2009

Directory Display Indicator; check to allow item to be displayed in Web Directories.

Record: 2/20 ... <OSC>

Steps

A student will not have a profile on this form until he or she has entered preferences in Self-Service for Students. You can create an initial profile by selecting **Build Directory Profile** from the **Options** menu.

Follow these steps to review directory profile preferences.

1. Access the Web User Directory Profile Form (GOADPRF).
2. Enter your student's Banner ID in the **ID** field.
3. Perform a **Next Block** function.
4. Click the appropriate **Display in Directory** checkboxes.
5. Click the **Save** icon.

Day-to-Day Operations

Introduction

The purpose of this section is to explain the day-to-day or operational procedures to utilize the Banner Self-Service products to facilitate student and faculty services on the web.

Objectives

At the end of this section, you will be able to demonstrate to students how to

- log in to Banner Self-Service
- access both non-secured and secured versions of the course catalog and schedule
- access both a detailed and a summary view of class schedules
- register, add and drop, and search for specific courses
- change class options
- verify that a student is, in fact, withdrawn and to give the student additional information regarding the withdrawal
- view Title IV information
- update personal information, including street and e-mail addresses
- view personal student records, including holds, grades, transcripts, and account information
- view the account details for specific terms.

You will also be able to

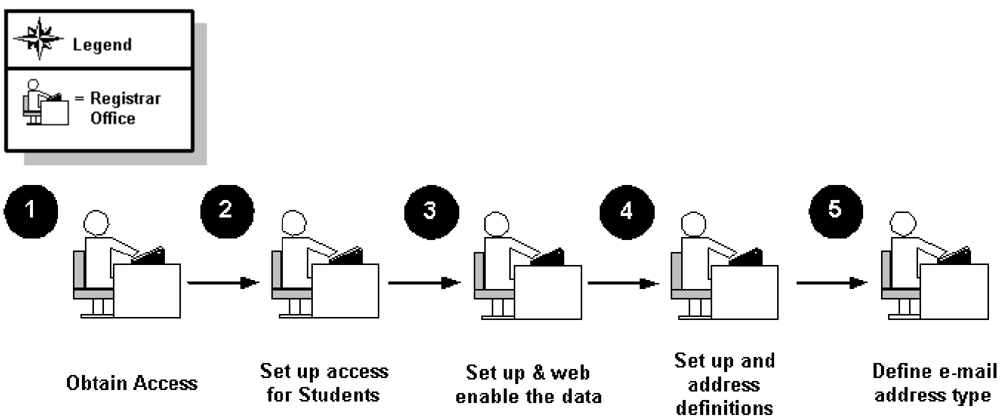
- use WebTailor to modify Information Text, enable and disable Web pages, and modify menu items
- use the WebCAPP feature.

Process Introduction

About the process

At this point you have learned about many of the features in Banner Student Self-Service. You have learned what you need to set up Banner Student and Banner General in order to use these features. This section of the workbook describes the day-to-day processing and operation of the Self-Service feature.

Flow diagram



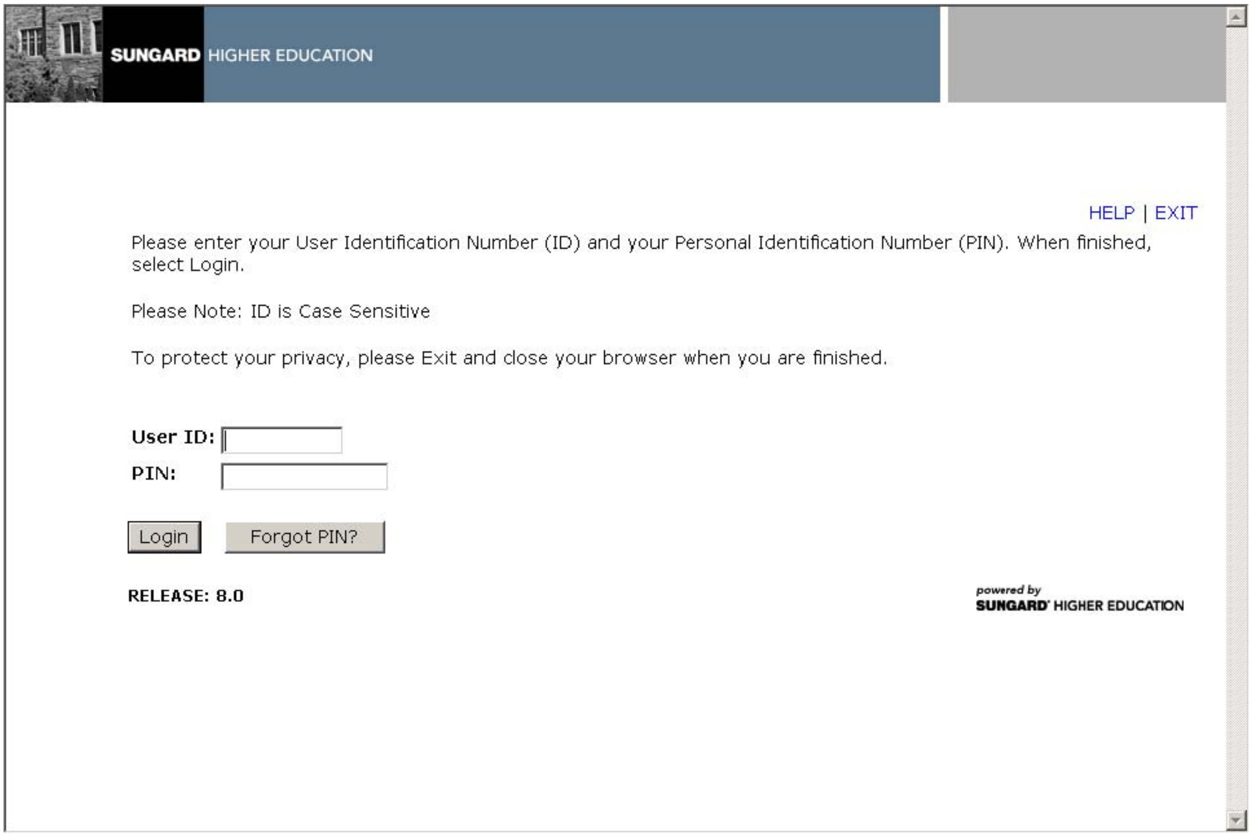
What happens

The stages of the process are described in this table.

Stage	Description
	Registrar's Office
1	Maintain access and security.
2	Update address, e-mail, telephone, and other personal information.
3	Process student withdrawals.
4	Set registration controls.
5	Review enrollment status codes (each term).
6	Review course registration status codes (each term).
7	Set up registration time ticketing (if used).
8	Process transcripts.
9	Move Registration Temporary Tables in order to update enrollment count.
10	Roll grades to academic history.
11	Perform end-of-term processing.
	Faculty/Advisors
1	Advise students and provide access to Self-service via alternate PIN.
2	Set up electronic gradebook.
3	Enter mid-term and final grades.

Accessing Student Self-Service

Banner Self-Service



Steps

Follow these steps to log in to Student Self-Service.

1. Open your Web browser and go to the Student Self-Service homepage. Your instructor will provide you with the correct URL.

2. Click the **Enter Secure Area** icon.

3. On the User Login page, enter the student's Banner ID in the **User ID** field and the PIN in the **PIN** field. (Depending upon institution settings, these fields may be case-sensitive).

4. Enter a login verification security question and answer. This question and answer will be entered into GOATPAD. When students forget their PINS, they can click the **Forgot PIN?** button on the initial login page, then enter the

answer to the verification question. From there, they can enter a new PIN.

Students need to respond to these prompts only when the **PIN Hint Question** and **PIN Hint Response** fields on GOATPAD are blank.

5. If you see the Terms of Usage page, click the **Continue** button. When you click this button, the **Accepted** check box on GOATPAD is automatically selected.

   Note: Whether or not this page is displayed the first time a user logs in is determined by the **Display Usage Page** checkbox on WebTailor's Customize Web Rules page. If the box is selected, all users of any Banner Self-Service product must accept the terms of usage before they may log in.

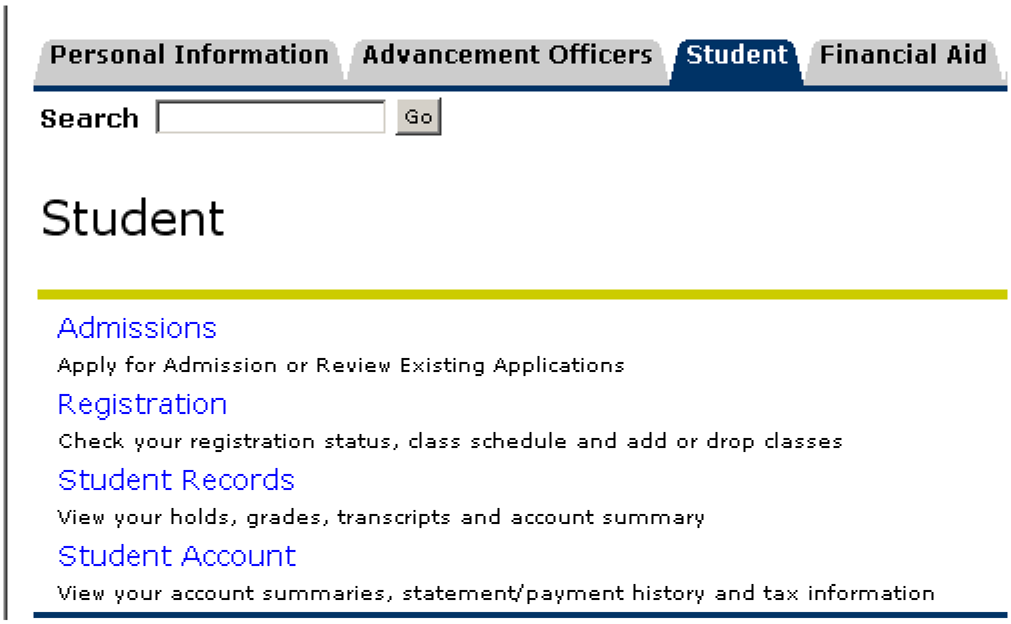
6. You should now see the main menu of Banner Student Self-Service.

Working with Term Selection

Steps

Follow these steps to select a term.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the Student tab. From there, click the **Registration** link.



3. From the **Registration** menu, click the **Select Term** link.
4. On the Term Selection page, select your term.
5. Click the **Submit Term** button. This term will be used for all term-related pages you select in Student Self-Service unless you return to this page later in your session and select another term.

Working with Registration, Add/Drop, and Withdrawal

Introduction

Students can check their registration status. The **Registration Status** page shows them information about items, which affect their ability to register, including

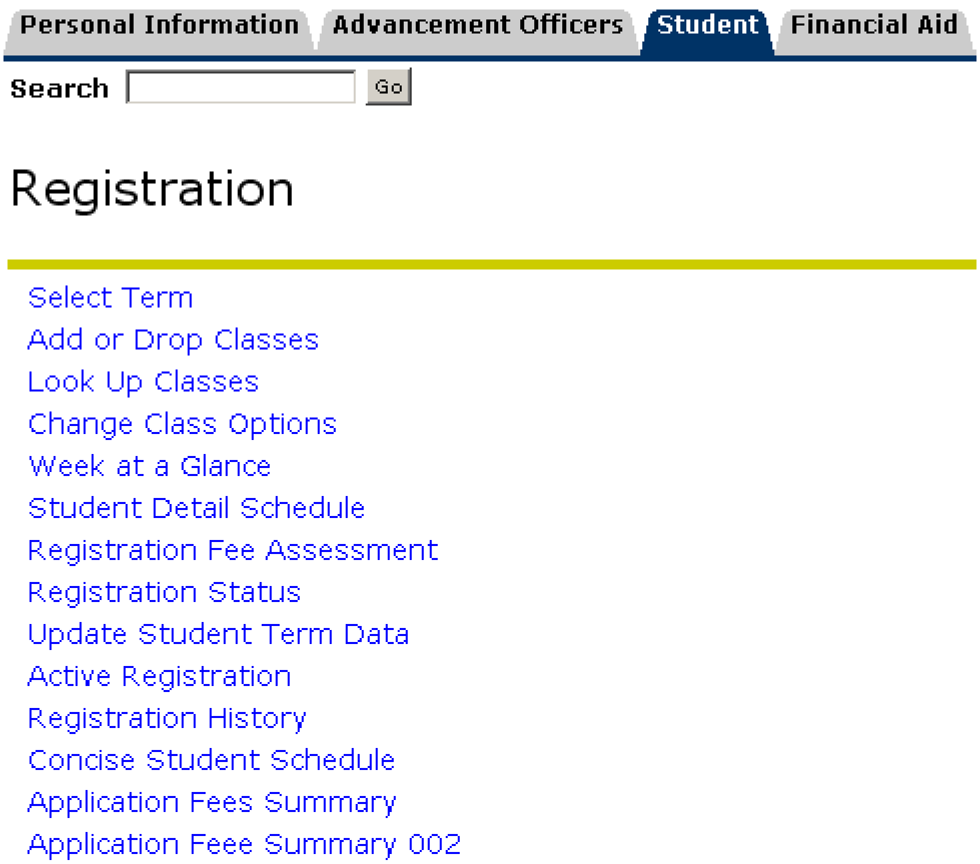
- time ticket assignments
- holds
- academic standing
- student status
- allowable permits and overrides
- current level, college, major, degree, and campus
- number of credit hours that are already earned.

Steps

Follow these steps to check registration status.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.

2. Open the **Student** menu, open the **Registration** menu.



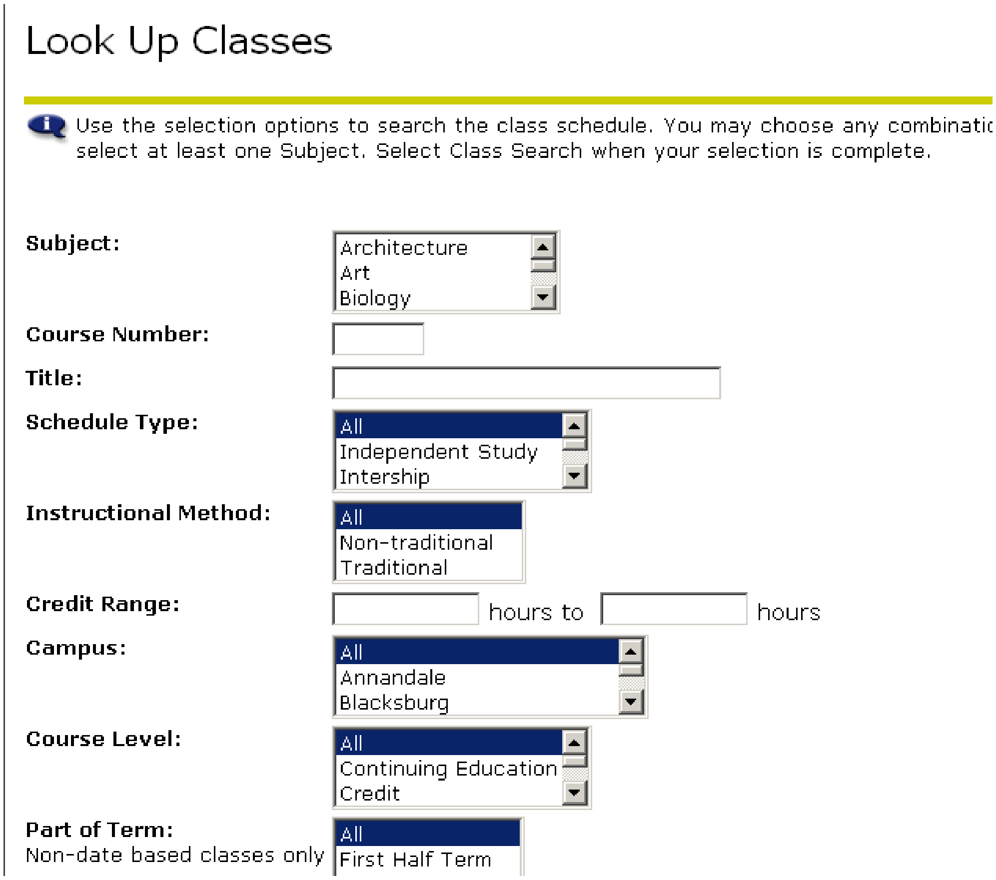
3. Click the **Registration Status** link. (You may be prompted to select a term).

4. On the **Registration Status** page, the student can see information, which affects his or her ability to register for classes in this term.

Steps

Follow these steps to look up a class to add.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the **Student** menu. From there, click the **Registration** link.
3. Select **Look-up Classes** from the **Registration** menu.
4. On the **Select Term or Date Range** page, select your term.
5. Click the **Submit** button.
6. On the **Look-Up Classes** page, select any combination of values.



7. Click the **Class Search** button.

Steps

Follow these steps to add a class from the look-up classes search results in the previous exercise.

1. Click a checkbox on the left side of the search results list to select a class.
2. Click the **Register** button. This opens the **Add or Drop Classes** page.
3. The class is added to the student's schedule. You can see it in the Current Schedule listing. Look at the **Status** column. Do you see that this class appears as ***Web Registered***?

Steps

Follow these steps to drop a class from the add/drop page.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. From the **Registration** menu, open the **Add or Drop Classes** page. (You may be prompted to select a term).
3. Look at the classes in the **Current Schedule** section.
4. From the pull-down list to the left of the class you added in the previous exercise, select the drop code. (This is the code you created and Web-enabled previously).
5. Click the **Submit Changes** button.

   Result: The page is redisplayed and the class you dropped is removed from the Current Schedule section.

Steps

Follow these steps to change class options.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the **Student** menu, then open the **Registration** menu.
3. Click the **Change Class Options** link. (You may be prompted to select a term).
4. On the Change Class Options page, you will see a pull-down list next to any item that a student can change. To change an option, open a list and select a new value.
5. Click the **Submit Changes** button.

Working with Student Schedules

Steps

Follow these steps to view **Week at a Glance**.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the **Student** menu. From there, click the **Registration** link.
3. From the **Registration** menu, click the **Week at a Glance** link.
4. If you are prompted for a term, select your term from the list, then click the **Submit Term** button.
5. On the Week at a Glance page, look at the student's schedule.
   - If the data range for a class does not include today's date, if meeting dates have not been assigned to a class, or if a class has a time conflict with another class the student is enrolled in, then it is not included in the calendar view.
   - Classes that a student is enrolled in but that are not shown in the calendar view are listed beneath the calendar.
   - Schedules for terms (or parts of terms) that do not include today's date have a link that appears towards the bottom of the page.
6. To see detailed information about a particular class, click the link for that class, either in the calendar view or in the list beneath the calendar view.
7. To see a calendar view for a term that does not include today's date, click the link for that term (if one exists).

Steps

Students can also see a detailed look at their schedules. Follow these steps to view student detail schedule.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. From the Registration menu, click the **Student Detail Schedule** link.
3. If you are prompted for a term, select your term from the list, then click the **Submit Term** button.
4. The **Student Detail Schedule** page shows information about each class the student is currently enrolled in, including campus, level, grading mode, days, time, location, schedule type, date range, and instructor(s).
5. Students who are Waitlisted for a class can view their position in the Waitlist queue for that class on the **Student Detail Schedule** page, providing the **Show waitlist position on Student Self-Service** checkbox has been selected on the Automated Waitlist Term Control Form (SOAWLTC).

   Note: The Waitlist display includes the student's position in the waitlist queue, and, if the student has been notified that the student has a place in the class (queue position of *0*), the date and time by which the student must complete registration in the class. If the student does not enroll in the class before that date and time expire, the registration is cancelled.

Steps

Follow these steps to view withdrawal and Title IV information.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Log in as the student you withdrew in the set-up exercise.
3. Open the **Student** menu, then open the Registration menu.
4. Click the **Withdrawal Information** link to review withdrawal information.
5. Click the **Amount of Title IV Aid Disbursed** or **Amount of Title IV Aid Eligible to be Disbursed** links to review Title IV information.

Working with Student Records

Banner Self-Service

Steps

Follow these steps to view holds.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the Student, then the **Student Records** menu.
3. Click the **View Holds** link.

4. Look at the information that is displayed.

Steps

Follow these steps to view midterm grades.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.

2. Open the Student, then the **Student Records** menu.

3. Click the **Midterm Grades** link.

   Note: You may be prompted to select a term.

4. Look at the grades that are displayed.

   Note: If a grade hold is currently in effect for the student, the message *"Your grades are not available due to holds on your record"* will display instead of the Select Term pull-down list, and no grade display will be available to the student.

Steps

Follow these steps to view final grades.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the Student, then the **Student Records** menu.
3. Click the **Final Grades** link.
4. Select a term.
5. Click the **Display Grades** button.
6. Look at the grades that are displayed.

   Note: If a grade hold is currently in effect for the student, the message *"Your grades are not available due to holds on your record"* will display instead of the Select Term pull-down list, and no grade display will be available to the student.
7. If there is one or more incomplete grade, and the **Web Display** indicator is selected for that grade's incomplete grade rule, the details including the class, incomplete grade, extension date and the default final grade are displayed in a separate data block on this page.

Steps

Follow these steps to view detail from gradable components in the Electronic Gradebook.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the Student, then the **Student Records** menu.
3. Click the **Grade Detail** link.
4. On the Select Section page, select a CRN.
5. Look at the grade detail that is displayed. This page shows detail about gradable components for the class as well as the marks the student has received for the gradable components.

Steps

Follow these steps to view a transcript.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the Student, then the **Student Records** menu.
3. Click the **Academic Transcript** link.
4. On the Display Transcript - Select Level and Type page, select a level and a transcript type.
5. Click the **Submit** button. This displays an unofficial transcript.

Steps

Follow these steps to view account information.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the Student, then the **Student Records** menu.
3. Click the **Account Summary by Term** link. (You may be prompted for a term).
4. View the student's account information for the current term.
5. Click the **Return to menu** button at the top of the page.
6. Click the **Account Summary** link.
7. View the student's account information.

Steps

Follow these steps to view tax information.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the Student, then the **Student Records** menu.
3. Click the **Select Tax Year** link.
4. On the Select Tax Year page, enter a tax year.
5. Click the **Submit** button.
6. View the student's tax information.

   Note: Students can update information on this page.
7. Click the **Student** link from the menu at the top of the page.
8. Open the Student Records menu, then click the **Tax Notification** link.
9. View the student's tax notification information.

Steps

Follow these steps to view a degree evaluation.

Note: The evaluations that students and faculty see in WebCAPP are *not* official evaluations.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Go to the Student menu and open the Student Records menu.
3. Click the **Degree Evaluation** link.

   Result: The Degree Evaluation page is displayed. It has links that allow you to view the current evaluation, a previous evaluation, or to generate a new one. You can also generate a **What If Analysis.**

   Note: If an evaluation has never been generated for this student in this curriculum, the program name is not underlined. The student can view evaluations for other curricula, if any exist, by using the **View Previous Evaluations** link; this is covered later in this lesson.

Steps

Follow these steps to generate a new evaluation.

1. On the Degree Evaluation page, click the **Generate New Evaluation** link at the bottom of the page.
2. On the Generate New Evaluation page, select the following:
    - program
    - degree
    - major
    - term
3. Click the **Generate Request** button.

Steps

Follow these steps to view a previous degree evaluation.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.

2. On the Degree Evaluation page, click the **View Previous Evaluations** link at the bottom of the page.

3. On the View Degree Evaluations page, select a program from the **Select Program** list. (If "Not applicable" is displayed, open the list to see all programs for the student).

4. Click the **View Request** button.

   At this point, the system works the way it works for viewing a current evaluation. The Degree Evaluation Display Options page is displayed, and you can choose the type of evaluation you want to view following the steps you just practiced.

5. On the Degree Evaluation Display Options page, select the **View General Requirements** radio button.

   It might take several moments for the page to be displayed because the system must run a process to calculate the data.

6. Click the **Select Desired View** button.

7. The General Requirements page shows a summary of the degree evaluation. For example, it shows that the classes the student has taken toward requirements, including credit hours, grades, and course reference numbers (CRNs).

8. Repeat steps 1-5 but this time select the **View Detail Requirements** radio button.

   The Detail Requirements page shows the details of the degree evaluation. For example, it shows all the classes that the student needs to take to meet the program requirements and whether the requirement has been met.

   Note: You can generate a printer-friendly version of these views. To do this, select the **Click for printer friendly version** check box on the Degree Evaluation Display Options page before you click the **Select Desired View** button.

Steps

Follow these steps to **apply to graduate**.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.

2. Open the Student, then the **Student Records** menu.

3. Click the **Apply to Graduate** link.

4. Select the curriculum or curricula for this graduation application by clicking on the radio button(s).

5. Click on the **Continue** button.

6. Select the Graduation Date from the available choices.

7. Click on the **Continue** button.

8. Indicate ceremony attendance by selecting the correct radio button: *Yes*, *No*, or *Undecided*.

   Note: This page is only visible if the **Ceremony** checkbox on the Graduation Date Availablility tab in the Self-Service Graduation Application Rules Form (SHAGADR) is selected. If it is not, skip to step 9.

9. Enter the name to be printed on your diploma. Use "**One of your Names**" to select or change the name to be printed on your diploma.

   Note: This page is only visible if the **Display Page** checkbox is selected in the Diploma Name section of the Diploma Name/Address Options tab of the Self-Service Graduation Application Display Rules Form (SHAGADR) for the associated graduation application display rule. If not, skip to step 14.

10. If a current diploma name exists, you may keep it by selecting **Keep Diploma Name**.

11. Click on the **Continue** button.

12. If modifying the diploma name, enter the changes in the indicated fields: **First Name**, **Middle Name**, **Last Name**, and/or **Suffix**.

    Note: These fields may only be edited if the **Edit** checkbox is selected in the Diploma Name section of the Diploma Name/Address Options tab of SHAGADR for the associated graduation application display rule. Also, which parts of the name may be changed are dependent on which parts are selected on the same tab.

13. Click on the **Continue** button.

14. Enter or edit a new mailing address for your diploma. Use **One of your Addresses** to select or change the mailing address for your diploma.

    Note: This page is only displayed if the **Display Page** checkbox is selected in the Diploma Mailing Address section of the Diploma Name/Address Options tab on the Self-Service Graduation Application Display Rules Form (SHAGADR) for the associated graduation application display rule.

    Note: If the **Display** checkbox is also selected, the address currently associated with the Diploma Record will also be displayed.

    Note: If the **Edit** checkbox is selected then the fields for the address may be modified.

15. Click on the **Continue** button.

16. Select the Graduation Application payment method.

    Note: If there is no payment associated with the Graduation application, this page is not displayed.

17. Click on the **Continue** button.

18. Review the graduation application details on the **Graduation Application Summary** page.

19. Click on the **Submit Request** button.

20. Observe the customized message verifying that the graduation application has been received.

    Note: If no customized letter has been created on the HTML Letter Rules Form (SOAELTR) and associated with a graduation application display rule on the Self-Service Graduation Application Display Rules Form (SHAGADR), then default text information defined by your institution using WebTailor is displayed.

Working with Personal Information

Introduction

Students have access to the **Personal Information** Menu. Pages in this menu are actually part of the Self-Service for General product, and so users of all Banner Self-Service products automatically have access to these pages.

From this menu, students can

- change their pins
- change their login verification question
- view and update their current address, telephone, and e-mail information
- view their Directory Profile
- view and update their emergency contact information
- update their marital status
- respond to surveys
- find information regarding institutional policies on updating name information
- find information on how to modify their U.S. Social Security information.

Display of addresses, telephone numbers, and e-mail addresses

You control which addresses, by their associated address type, will appear in Self-Service for Students. To do this, you need to create rules on the Address Role Privileges Form (GOAADRL).

When students submit changes to their addresses via Self-Service for Students, the changes are immediately entered in the Banner database. In addition, they are stored in a review form. You can use this review form, the Address Review and Verification Form (GOAADDR) to ensure that the updated information conforms to your institutions data entry guidelines.

Students can see only e-mail addresses that have been Web-enabled on GOAEMAL in Self-Service for Students.

Changing PINs

When a student changes his or her PIN, the updated PIN information (and the audit trail of changes) is stored on the Third Party Audit Form (GOATPAD).

Directory Profile

You can establish rules defining what information is displayed for students in their directory profile. Students can then specify what information they wish to have displayed in their profile when the Campus Directory is generated.

You establish Directory Profile rules on the Directory Options Rule Form (GOADIRO). When students make changes to their online Directory Profile, those changes are entered in to the Web User Directory Profile Form (GOADPRF).

Emergency contact information

Students can see and update their emergency contact information that is stored on the Emergency Contact Form (SPAEMRG).

Changes to name and U.S. Social Security information

Students cannot change their name or their U.S. Social Security Number information using Self-Service for Students. They can access pages on which your institution can provide directions or information on how they might do this.

Respond to surveys

You can create surveys in Banner that you can then distribute to students. When you create your surveys, you can specify that everyone with a particular Web user role will receive the survey or you can create and use a population selection to determine who will receive the survey.

As students respond to the survey, you can view the results in Banner.

Personal Information

- Answer a Survey
- Change Security Question
- View Addresses and Phones
- Update Addresses and Phones
- View E-mail Addresses
- Update E-mail Addresses
- Directory Profile
- View Emergency Contacts
- Update Emergency Contacts
- View Ethnicity and Race
- Update Ethnicity and Race
- Update Marital Status
- Name Change Information
- Social Security Number Change Information
- Change your PIN

Need to update your PIN? Change it here.

Steps

Follow these steps to change a PIN.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the **Personal Information** menu.
3. Click the **Change PIN** link.
4. In the corresponding fields, enter the current PIN and a new PIN.
5. Click the **Change PIN** button.

Steps

Follow these steps to change a login verification question.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the **Personal Information** menu.
3. Click the **Change Security Question** link. The old question and answer is displayed.
4. In the corresponding fields, enter the new question and answer.
5. Click the **Submit** button.

Steps

Follow these steps to view and update current address, telephone, and e-mail information.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the **Personal Information** menu.
3. Click the **View Addresses and Phones** link.
4. On the View Addresses and Phones page, review the current information.
5. Click the **Update Addresses and Phones** link at the bottom of the page.
6. To update an existing address, click the **Current** link that is displayed next to it.

   If "Current" does not have a link, then that address has an address type that is designated as display-only the Address Role Privileges Form (GOAADRL).
7. In the corresponding fields, enter the new address and telephone number information.
8. Click the **Save** button.

   Note: The changes are automatically entered into Banner.
9. Click the **Personal Information** link at the top of the page.
10. On the Personal Information menu, click the **View E-mail Address Information** link.
11. On the View E-mail Addresses page, review the current information.
12. Click the **Update E-mail Addresses** link at the bottom of the page.
13. From this point, you can update e-mail addresses in a manner similar to that for updating regular addresses.

Steps

Follow these steps to view and update a directory profile.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the **Personal Information** menu.
3. Click the **Directory Profile** link.

4. On the Directory Profile page, review the current information.
5. To include an item in the Campus Directory, select the **Display in Directory** check box.
6. Click the **Submit Changes** button.

Steps

Follow these steps to view, update, and review emergency contact information.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the **Personal Information** menu.
3. Click the **View Emergency Contacts** link.
4. On the View Emergency Contacts page, review the current information.
5. Click the **Update Emergency Contacts** link at the bottom of the page.
6. On the Select Contact page, click the name of an existing contact or the **New Contact** link.
7. On the Up Emergency Contacts page, enter updated information in the appropriate fields.
8. Click the **Submit Changes** button.
9. In Banner, go to the Emergency Contact Form (SPAEMRG).
10. In the **ID** field, enter the student's Banner ID.
11. Perform a **Next Block** function.
12. Review the emergency contact information.

Steps

Follow these steps to update and review marital status information.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area.**
2. Open the **Personal Information** menu.
3. Click the **Update Marital Status** link.
4. On the Update Marital Status page, select a new marital status.
5. Click the **Update Marital Status** button.
6. In Banner, go to the General Person Form (SPAPERS).
7. Review the value in the **Marital** field.

Working with the Account Detail for Term Page

Introduction

The Account Detail for Term page (bwskoacc.P_ViewAcctTerm) displays detailed account information for the selected term on one page, which makes it easy for a student to review their account detail and see at a glance how much money they owe the institution.

When assessments are enabled on SOATERM and SLATERM, and a student who has not been assessed or who has charges pending accesses the page, fee assessment will run automatically. This applies to tuition and fees, as well as housing (including room, meals, and phone). Other information may also display, such as memoed and authorized financial aid, other Accounts Receivable memos (contracts, exemptions, deposits), and installments as enabled via TSATERM. New assessments and installment plan assignments are saved to the database, but calculated memo transactions are not retained.

The values that display on this page depend on the choices made on TSATERM for memos and authorized financial aid, and on TSACTRL for installment plan information.

Your institution can choose to display a **Pay Now** button on the page, which lets students access the payment gateway and enter credit card information to make a payment on their account.

Note: Display of detail codes in the Account Summary and the Account Detail Self-Service pages can be suppressed by setting the External Code to N(o) on GTVSDAX for internal code *WEBDETCODE* in group *WEBACCTSUM*.

Account Detail for Term – sections

The Account Detail for Term page contains these sections:

- Account Detail
- Authorized Financial Aid
- Memos
- Installment Plan

You can also link to the Statement and Payment History page from the Account Detail for Term page.

Account Detail

This section displays charge and payment transactions for the selected term on the student's account. Each individual transaction can be displayed or the transactions can be summarized by detail code. The institution may also choose to display totals for Account Balance Only or both Account Balance and Current Due, which excludes future-dated transactions.

Authorized Financial Aid

This section displays the financial aid that is authorized, but not yet disbursed to the student's account. The Authorized Financial Aid Balance reduces the Account Balance and Current Due. In this section, the institution may choose to display No Calculated totals, Adjusted Account Balance, or both Adjusted Balance and Current Due.

Memos

This section displays pending transactions not yet posted to the student’s account. Expected charges increase the Account Balance and Current Due, while expected payments reduce the Account Balance and Current Due. In this section, the institution may choose to display No Calculated totals, Adjusted Account Balance, or both Adjusted Balance and Current Due. This section includes financial aid memos, third party contract credits, exemptions, deposits eligible for release, and other Accounts Receivable memos.

Installment Plan

This section displays the amounts and dates that installment plan payments becomes due if the student chooses to pay by installment.

Steps

Follow these steps to view information on the Account Detail for Term page.

1. Log onto Self-Service for Students by clicking on **Enter Secure Area**.
2. Open the Student, then the **Student Records** menu.
3. Click the **Account Detail for Term** link.

   Result: The Select Term page is displayed.
4. Choose a term from the pull-down list and click the **Submit** button.
5. Review the sections of the web page:
   - Account Detail
   - Authorized Financial Aid
   - Memos
   - Installments Plans

   Note: Info text may display within each section.

Using WebTailor – An Introduction

Who can access WebTailor?

Only users who have been assigned the role of WebTailor Administrator can access WebTailor components. This role is assigned initially to one user only by means of a command line script. Thereafter, that user can assign the role to other users. If you are assigned the role of WebTailor Administrator, you will see the WebTailor Administration menu when you log in to any Banner Self-Service product.

Information text

Information Text is explanatory text that appears towards the top of Banner Self-Service pages. Pages are delivered with Information Text already built, but you will want to customize this text to reflect your own institution's policies and procedures.

Menu items and pages

You can use WebTailor to change the descriptive text that appears for individual items on menus. You can also use WebTailor to enable and disable individual pages.

For more information...

Using WebTailor, you can modify nearly everything that appears on a Banner Self-Service page. However, learning how to do this is beyond the scope of this course. For more information, see *Implementing Banner Self-Service for General with WebTailor*.

Steps

Follow these steps to grant user access to Web Tailor.

1. Log in as web tailor administrator.
2. “User Roles” – enter User ID of person getting access.
3. Select roles from list.
4. Click the **Exit** icon.

Steps

Follow these steps to change Information Text.

1. Log in to the Banner Self-Service homepage using a Banner ID that has been assigned the role of WebTailor Administrator.
2. Open the WebTailor Administration menu.
3. Click the **Information Text** link.
4. From the **Customize** list, select *bwgkoinf.P_DispUpdSSN*. Or Social Security Number Change Information.
5. Click the **Copy Baseline entries to Local** button.
   - This opens the Reorder or Customize Information Text page, populated with the Information Text that appears on the U.S. Social Security Information page.
   - You can see that this page contains two sets of five separate Information Text entries, one with the source of Baseline and the other local.
6. Click the **Default** link next to the first local entry. This opens the Customize the selected Information Text entry page.
7. On this page, change the text that appears in the **Information Text** field.
8. Click the **Submit Changes** button.

Steps

Follow these steps to review the changed information text.

1. Click the **Personal Information** link at the top of the page.
2. Click the **Social Security Number Change Information** link.
3. Review the changes you just made.

Steps

Follow these steps to change the text for a menu item.

1. Log in to the Banner Self-Service homepage using a Banner ID that has been assigned the role of WebTailor Administrator.
2. Open the **WebTailor Administration** menu.
3. Click the **Web Menus or Procedures** link.
4. From the **Customize** list, select b_menu.P_webTailorMnu or WebTailor Menu.
5. Click the **Customize Web Menu or Procedure** button.
6. Click the **Customize Menu Items** button at the bottom of the page.

   Result: This opens the Reorder or Menu Items page, populated with the list of items that appears on the WebTailor Administration menu.
7. Click the **Copy Baseline to Local** button.
8. Click the URL link that is next to the first entry with a source of local (which is Customize a Web Menu or Procedure).
9. On the Customize the Selected Menu Item page, enter some text in the **Link Description** field.
10. Click the **Submit Changes** button.
11. Click the **WebTailor Administration** link at the top of the page.
12. Look at your text that now appears beneath the menu item.

Steps

Follow these steps to disable a page.

1. Log in to the Banner Self-Service homepage using a Banner ID that has been assigned the role of WebTailor Administrator.

2. Open the **WebTailor Administration** menu.

3. Click the **Web Menus and Procedures** link.

4. From the **Customize** list, select *bwgkoinf.P_DispUpdSSN or Social Security Number Change Information*.

5. Clear the **Enabled Indicator** check box.

6. Click the **Submit Changes** button.

7. Click the **Personal Information** link at the top of the page.

   Result: The Social Security Number Change Information page is no longer listed on the menu.

8. To restore this page to the menu: repeat steps 1-5, but this time select the **Enabled Indicator** check box.

Summary

Let's review

As a result of completing this workbook, you have

- provided access to Student Self-Service
- worked with Term Selection
- worked with Student Schedules
- worked with Registration, Add/Drop and Withdrawal
- worked with Graduation Application
- worked with Student Records
- worked with Personal Information
- used Web-Tailor
- used the Section Syllabus Form.

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

Only terms that are Web-enabled on the Term Control Form (SOATERM) will appear in the drop down list on the web.

True or False

Question 2

A student can add a class in Student Self-Service from:

A. the Look-Up Classes search results page

B. the Add/Drop page

C. none of the above

D. both a & b

Question 3

Can students view permits/overrides granted to them for a registration term?

Question 4

Can students use Student Self-Service to see the marks they receive in classes that use the Electronic Gradebook?

Question 5

What other documentation can you use to find out more about using CAPP in Banner Student?

Question 6

Where do you define default values for degree evaluations?

Question 7

On what Banner form are WebCAPP rules entered on?

Question 8

Can you generate an evaluation that is easy to print?

Question 9

Can the grade entry and display rules for a part of term be changed for an individual section?

Question 10

On what Banner form can you establish rules about the types of addresses that can be seen and updated in Student Self-Service?

Question 11

Can you change the Information Text that appears on most Student Self-Service pages?

Answer Key for Self Check

Question 1

Only terms that are Web-enabled on the Term Control Form (SOATERM) will appear in the drop down list on the web.

True, only terms that are Web-enabled on the Term Control Form (SOATERM) will appear. To Web-enable a term, the “Master Web Term Control” in the area of the Web Processing Controls window must be selected.

Question 2

A student can add a class in Student Self-Service from:

A. the Look-Up Classes search results page

B. the Add/Drop page

C. none of the above

D. both a & b

Question 3

Can students view permits/overrides granted to them for a registration term?

Yes. Permits/overrides entered for a student on SFASPRO are displayed on the Registration Status webpage.

Question 4

Can students use Student Self-Service to see the marks they receive in classes that use the Electronic Gradebook?

Yes, they can see these marks on the Grade Detail page.

Question 5

What other documentation can you use to find out more about using CAPP in Banner Student?

The Using Curriculum, Advising, and Program Planning with Banner Student handbook.

Question 6

Where do you define default values for degree evaluations?

On the CAPP Compliance Default Parameter Form (SMADFLT).

Question 7

On what Banner form are WebCAPP rules entered on?

The Crosswalk Validation Form (GTVSDAX).

Question 8

Can you generate an evaluation that is easy to print?

Yes. To do this, select the Click for printer friendly version check box on the Degree Evaluation Display Options page.

Question 9

Can the grade entry and display rules for a part of term be changed for an individual section?

Yes. The SSAWSEC form can be used to override the SOATERM settings for part of term grade entry and display.

Question 10

On what Banner form can you establish rules about the types of addresses that can be seen and updated in Student Self-Service?

You establish address rules on the Address Role Privileges Form (GOAADRL).

Question 11

Can you change the Information Text that appears on most Student Self-Service pages?

Yes.

Appendix

Forms Job Aid

Form	Full Name	Use this Form to...
GTVEMAL	E-mail Address Type Code Validation	define valid e-mail address type codes
GTVLETR	Letter Code Validation	define codes that identify the letters you can generate in Banner. Examples of letters include acknowledgement, applicant, and offer letters.
GTVSDAX	Crosswalk Validation	define records in the Crosswalk Table. Object:Access uses this information to identify the data to be reported in repeating groups and the external codes that should be selected in the Object:Access views.
SFARCTL	Registration Group Control	define registration group codes and the assigned registration priorities for those group codes for Student Self-Service Web registration and Voice Response telephone registration
SFARCTT	Registration Priority Control	define rules that assign the begin and end dates and times, and priority assignment for each registration time slot for Student Self-Service Web registration and Voice Response telephone registration.
SFARGRP	Student Registration Group	assign a registration group to individual students on a term-by-term basis.
SFARGTC	Third Party Registration Time Controls	define time periods in which students can access registration add/drop activities based upon their personal and student characteristics.
SHATPRT	Transcript Type Rules	create the rules associated with the type of transcript being requested.
SHAWTRR	Web Transcript Request Rules	set up the processing rules that will be in effect for all Web transcript requests.

Form	Full Name	Use this Form to...
SLATERM	Housing Term Control	allow for the control of certain housing assignment and assessment attributes. These attributes include the ability to permit assignments, the ability to assess housing, meal plan, and phone assessments, the effective date to be used for the assessments, and the roommate sequence number.
SMADFLT	Compliance Default Parameters	define default values to be used when compliance requests are created
SMAPRLE	Program Definition Rules	define program rules. The Web Indicator checkbox controls whether the program in the rule should be available when a new compliance evaluation is requested.
SMAPROG	Program Requirements	define requirements at the program level
SMAWCRL	WebCAPP Rules	set up the controls for the WebCAPP rules for evaluation requests
SOACURR	Curriculum Rules	view or create curriculum rules.
SOAELTR	Format HTML Letter Rules	construct letters using formatting commands and free form text.
SOATERM	Term Control	establish controls for a specific term.
SOAWDSP	Web Display List Customization	define the validation table codes that can be displayed on the Web for open learning courses and registration information.
SPAAPIN	Alternate Personal ID Number	allow a term-specific, Alternate Personal Identification Number (PIN) to be assigned to students.
SSARULE	Schedule Processing Rules	enter or display rules for registration status codes, refunding, and extension processing at the section level, independent of part-of-term or static dates, that can be administered based on an individual learner.
SSASECT	Schedule	create or display sections for the courses that were created in the Catalog module, according to the definitions and restrictions that were set up there.

Form	Full Name	Use this Form to...
SSAWSEC	Section Web Control	enter or display the section Web controls for Student Self-Service and Faculty and Advisor Self-Service.
STVDEGC	Degree Code Validation	maintain the degree codes, such as Undeclared, Bachelor of Arts, Doctor of Education, and so on.
STVDFLT	Compliance Default Codes Validation	define compliance types to be used as optional default values for use in running batch compliance.
STVELMT	HTML Letter Module Validation	record the modules and views used in the generation of email letters. This determines the data columns that can be placed on the dynamic HTML letter.
STVHLDD	Hold Type Code Validation	create, update, insert, and delete hold type codes.
STVORIG	Originator Code Validation	create, update, insert, and delete originator codes, such as Student Accounts Office, Bursar's Office, Dean of Students, and so on.
STVPRNT	Compliance Print Code Validation	define and maintain compliance print codes.
STVPROC	Process Control Code Validation	create, update, insert, and delete the process codes that are allocated to either a faculty attribute or advisor type and control access to the electronic grade book and academic transcript in Faculty and Advisors Self-Service.
STVROVR	Registration Permit-Override Code Validation	define and maintain the codes and descriptions for assigning registration permit-override groups to individual students in the Student Permit-Overrides Form (SFASRPO) for registration processing.

Form	Full Name	Use this Form to...
STVRSTS	Course Registration Status Code Validation	create, update, insert, and delete course registration status codes such as Audit, Registered, Web Drop. You can set the switches in the checkboxes to determine what the various status codes allow, such as count in enrollment, place on waitlist, whether the course is gradable, and so on. You may also specify an automatic grade which will be placed on the student's registration record when the status is entered. For example, a course registration status of *WF*, Withdraw Failing, can automatically place an *F* on the student registration record.
STVSBGI	Source/Background Institution Code Validation	create, update, insert, and delete source/background institution codes, such as Sungard Higher Ed University.
STVSTST	Student Status Code Validation	create, update, insert, and delete student status codes, such as Active, Withdrawn, Inactive Due to Graduation, and so on.
STVSUBJ	Subject Code Validation	create, update, insert, and delete subject codes, such as Accounting, Botany, Economics, and so on.
STVTPRT	Transcript Type Code Validation	create, update, insert, and delete codes for transcript types, such as Official, Internal, Advising, and so on.
STVWPYO	Web Payment Options Validation	create and update the Web payment option codes for use with Web transcript requests.
STVWSSO	Web Self-Service Options Validation	create and update the self-service option codes for use with self-service transcript and enrollment verification requests.
TSACTRL	Student Billing Control	enter the parameters for the operation and control process for the Student Accounts Receivable module at your institution.
TSATERM	Account Receivable Term Control	enter term-specific parameters for the operation and control of Student Accounts Receivable.

Terminology

Connected

Refers to courses that are associated with each other via co-requisites, prerequisites, crosslists, or links.

Connection

Refers to a set of connected courses.

Example: The connected courses of Biology 101 lecture and Biology 102 lab (co-requisites) would be considered a connection.

Co-requisite

Two or more different subject/course numbers that must be taken in the same term or in a prior term.

Cross List

Two courses taught by the same instructor in the same room at the same time but may be listed with a different subject code and/or course number.

Link

Same subject and course number, with different schedule type(s) that must be taken in the same term.

Pre-requisite

A requirement that must be satisfied in a prior term, consisting of

- course(s)
- test score(s).