# Banner Student Academic History Training Workbook

Release 8.1 - October 2008 Updated 11/6/2008



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#### **Revision History Log**

Publication Date	Summary
October 2008	New version that supports Banner 8.1 software.

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# Introduction



#### Course goal

The goal of this workbook is to provide you with the knowledge and practice to setup and maintain academic history at your institution. The workbook is divided into these sections:

- Introduction
- Set Up
- Day-to-Day operations

#### **Course objectives**

In this course you will learn how to

- to complete various validation tables and control forms pertaining to academic history
- build, enter, and roll grades
- change/maintain grades
- calculate academic standing
- produce grade mailers
- add/change/award degrees
- review academic history online
- print transcripts
- process XML transcripts
- generate a number of reports and processes.

#### Intended audience

Staff from the office of the Registrar and/or Academic Records.

#### **Prerequisites**

To complete this course, 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 and perform the necessary set up in Banner
- completed the *Course Catalog* training workbook
- completed the *Class Schedule* training workbook
- completed the *General Student* training workbook
- completed the *Registration* training workbook.

## **Process Introduction**

#### Introduction

The office of the Registrar and/or Academic History is responsible for running the end of term processes, which enables them to produce accurate academic transcripts and award degrees.

#### **Flow diagram**

This diagram highlights where Academic History occurs within the overall Student process.



#### 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 view, save, and print online output.
- Parameter validation criteria will be defined.



### **Section goal**

Set Up

The goal of this section is to outline the setup process and detail the procedures to set up your Banner system to handle Academic History at your institution.

#### **Objectives**

In this section you will learn how to complete various validation tables and control forms pertaining to academic history.

## Rule and Validation Forms That Control Academic History

#### Introduction

Before entering any academic history information into the system, there are several rule and validation forms that need to be set or created.

The following examples are rule and validation forms that play important roles in the Academic History module. Review these forms and practice entering information into each one.

Form Description	Banner Name
Repeat/Multiple Course Rules Form	SHARPTR
Transcript Type Code Validation Form	STVTPRT
Transcript Type Rules Form	SHATPRT
Grade Code Maintenance Form	SHAGRDE
Grade Code Substitution Form	SHAGRDS
Academic Standing Rules Form	SHAACST
Source/Background Access Form	SOASBGA
Academic History Control Form	SHACTRL
GPA Display Rules	SHAGPAR
Continuant Term Rules	SOACTRM
Grade Mode Validation Form	STVGMOD

#### Introduction

The Banner Student System works in conjunction with other Banner systems. Certain processes in Banner Student are associated with specific values in validation forms. If the forms do not contain these values, processes associated with these forms will not run correctly. You can tailor some of the forms by adding or deleting values, but certain forms must remain as delivered.

Validation forms enable you to tailor the Student System to your needs by providing the system with lists of coded values that can be entered at specific prompts.

Note: When tailoring these codes, be mindful of the impact on other modules, i.e. Human Resources or Alumni. Refer to your institution's data standards policy and procedures as well to ensure compliance.

#### **Shared validation forms**

Some of the validation forms that need to be set-up will be tables that are maintained by other areas of Banner. Validation forms beginning with STV are student forms that may be shared with the other Banner systems.. Those beginning with GTV are Banner General System forms. Some of these forms can be viewed but may not be changed without proper security access.

#### **Purpose**

The Repeat/Multiple Course Rules Form (SHARPTR) is used to create and maintain the institution's rules for determining when to include or exclude a repeated or equivalent course in the student's GPA. While preparing your Banner Student System, you need to define rules by which repeat courses are analyzed for grading purposes.

#### **Banner form**

Level dicato	r	Title Indicator	Scho Ii	edule Type ndicator	Transfer C Indicat	ourse or	Pa: Gr	ssing ade ▼		User	Activity Date
1								С	мносни	AN	24-0CT-2007
JOTE: P	assing (	Grade is only us	ed wl	nen the selection	n rule is firs	t passi	ng grade.				
<b>T</b>		Repeat Limit	t 	Repeat Limit	Repeat Li	mit	Repeat Hour	s	Repeat Hours	Repeat Hours	A stilling Date
Term ▼	Level	Selection Rul	e Ev	aluation Grade	GPA Calcul	ation	Selection Ru	le Et	valuation Grade	GPA Calculation	Activity Date
199910	MV	Highest	-	F	Selected	*	Highest	-	F	Selected 💌	04-APR-2007
199710	GR	Latest	-	F	Selected	-	Latest	-	F	Selected 💌	13-APR-2007
199501	DN	Highest	-	F	Selected	-	Highest	-	F	Selected 👻	19-JUL-2006
199010	UG	Latest	-	F	Selected	-	Latest	-	F	Selected 🔻	10-SEP-2007
199001	AP	First Passing	-	F	All	-	First Passing	-	F	All	02-OCT-2007
000000	01	First Passing	-	F	All	-	First Passing	-	F	All 👻	24-0CT-2007
000000	02	Highest	-	F	All	-	Latest	-	F	All	15-JUN-2007
			-			-		-		-	
			-			-		-		-	
			-			-		-		-	
			-			-		-		~	
			-			-		-			

#### **Steps**

Follow these steps to set up rules for non-repeatable and multiple enrollment courses.

- 1. Access the Repeat/Multiple Course Rules Form (SHARPTR).
- 2. Click the **Level Indicator** checkbox if the course is considered a different occurrence when the levels are different.
- 3. Click the **Title Indicator** checkbox if the course is considered a different occurrence when the course titles are different.
- 4. Click the **Schedule Type Indicator** checkbox if the course is considered a difference occurrence when the schedule types are different.
- 5. Click the **Transfer Course Indicator** if transfer courses are to be used in the repeat limit counts.
- 6. Select the minimum passing grade for your institution in the **Passing Grade** field.

Note: This is only required if the repeat rules are set to use First Passing Grade.

Note: The **User and Activity Date** fields automatically records the user ID and activity date when the table was last updated.

- 7. Perform a **Next Block** function.
- 8. Enter the term code when the repeat rule becomes effective in the **Term** field.
- 9. Enter the course level in the **Level** field.
- 10. Select one of the following options from the drop down menu in the **Repeat Limit Selection Rules** field:
  - H = Highest, to select courses with the highest grade for inclusion
  - *F* = First Passing, to select courses with the first passing grade for inclusion (as defined in the **Passing Grade** field in the Key Block)
  - L = Latest, to select courses which are the latest attempt for inclusion
- 11. Select the minimum grade in the **Repeat Limit Evaluation Grade** field.
- 12. Select one of the following options from the drop down menu for the **Repeat Limit GPA Calculation** field:
  - S = Selected, to use select repeated courses in the GPA calculation

- A = AII, to use all repeated courses in the GPA calculation
- 13. Build additional rules as needed.
- 14. Click the Save icon.
- 15. Click the **Exit** icon.

## Transcript Type Code Validation

#### **Purpose**

The Transcript Type Code Validation Form (STVTPRT) is used to maintain codes for the types of transcripts (official, internal advising, etc.).

#### **Banner form**

RTranscript Type Code Validatior	n STVI	IPRT 8.0 (BAN8) 20000000000000			
c	Code	Description	Web Indicator	Web Request Indicator	Activity Date
AD	DVS	Advisor	<b>V</b>	<ul> <li>Image: A set of the set of the</li></ul>	29-MAY-2002
BI	ILL	Bill's Test Transcript		1	22-AUG-2007
BC	OFC	Rollins Test2			11-MAR-2004
C/	AR1	Rapp's transcript	] 🗆		27-FEB-2002
CF	ROK	test	] 🗆		12-MAY-2004
Di	AN	dan	) 🗆		21-DEC-2001
EC	DD	Edds Test	] 🗆		13-JUN-2002
EC	DI	EDI Transcipt processing	] 🗆	1	17-JUL-2007
EV	VE	Eve's test transcript		-	16-OCT-2007
GF	RAD	Linda Grad test	) 🗆	1	17-JUL-2007
IN	NTR	Internal	) 🗆		18-MAY-1999
JE	RR	Gerald's Transcript Print	) 🗆		18-JUL-2007
DC	DEI	Joe indovina's EDI.Smart Test	] 🗆		18-FEB-2004
JO	010	Jojo's Test	] 🗆		17-JUL-2007
LA	ANE	Test	) 🗆		18-FEB-2004
LM	MGR	Lori's Graduate	] 🗆	1	17-JUL-2007
LC	ORI	Lori's Test Transcript	] 🗆	1	17-JUL-2007
LV	WEB	Lori's Web Transcript	) 🗆	<ul> <li>Image: A start of the start of</li></ul>	17-JUL-2007
M	ARC	Marci Test	] 🗆		17-OCT-2007
ME	вн	MBH TEST	] 🗆	1	17-JUL-2007
M	v	Marian's transcript test			11-JUN-2002
M	vw	Marian's WEB transcript	] 🗆	<ul> <li>Image: A start of the start of</li></ul>	17-JUL-2007
10	FF	OFFicial			18-FEB-2004

#### **Steps**

Follow these steps to create a transcript type.

- 1. Access the Transcript Type Code Validation Form (STVTPRT).
- 2. Enter the code for the new transcript type in the **Code** field.
- 3. Enter a brief description for the new transcript type in the **Description** field.
- 4. Click the **Web Indicator** checkbox if this transcript type should be accessible via the Web.
- 5. Click the **Web Request Indicator** checkbox if this transcript type may be requested via the Web.

- 6. Click the Save icon.
- 7. Click the **Exit** icon.

# Transcript Type Rules

#### Purpose

The Transcript Type Rules Form (SHATPRT) to create the rules associated with the type of transcript being requested.

### **Banner form**

Rules SHATPRT	8.0 (BAN8) 00000000000000	000000000000000000000000000000000000000	*****************************	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Type: ADVS 🔽 Advisor				
Print Options	Curriculum Print Options	ersonalization Print Options	Self-Service Print Options	
Print Options				
✓ Transcript Type Description	🗹 Level Comment	s	🗹 Academic Standing by Term	
🗹 Transcript Type	🗹 Term Comment:	s	Last Academic Standing	
Student Address	🗹 Course Comme	nts	Institution Totals	
✓ Issued Address	🗹 College by Tern	n	🗹 Transfer Totals	
☑ High School	🗹 Major by Term		✓ Overall Totals	
🗹 Current Student Type	🗹 Student Type by	y Term	✓ Test Scores	
Term Admitted	🗹 Course Campus		Immunization Data	
Term Matriculated	🗹 Long Course Tit	le	User-Defined Extensions	
🗹 Committees	🗹 Transfer Detail		🗹 College Transcript	
Academic Events	✓ Registration Sta	art and End Dates	✓ Student	
Academic Event Decision	CEU Units		🗹 Academic Record	
🗹 Academic Event Grade	CEU Dates		✓ Course	
☑ Degree GPA	CEU Contact Ho	urs Activity Date:	24-OCT-2007	
🗹 Qualifying Papers	GPA Statistics	User ID:	MHOCHMAN	
🗹 Qualifying Papers Text	🗹 Dean's List			

#### **Steps**

Follow these steps to define a new transcript type or maintain an existing one.

- 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.

Example: Test score data can be included in the XML transcript. The **Test Scores** checkbox allows you to specify whether or not a transcript type is to have test scores included in its output. You can *only* include test score data in an XML transcript. The same is true for immunization information and User Defined Extensions.

GPA information can also be included in the XML transcript in rounded or truncated format.

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

Note: Use this tab 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 tab 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, if applicable.

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

- 10. Select the appropriate Processing Control options, Service Level options, and Payment Options for Self-Service, if applicable.
- 11. Click the **Save** icon.

12. Click the Exit icon.

#### **Purpose**

The Grade Code Maintenance Form (SHAGRDE) is used to capture and maintain all of the institution's grading symbols and associated quantity points. These rules must be developed one time for your institution, unless policy changes.

#### **Banner form**

Grade Code	e 9 L	_evel	Abbreviatio	on Term	Statu: Ind	s Quality Points	Attempted	Count Passed	t in d Earned	I GPA	Traditional Ind	In:  Ind	complete Grade Default 💌	Web Ind	Numeric Value	Repe Ind	at Activity Date	
	С	00	С	000000	A	2.000			<b>~</b>					<b>v</b>			17-APR-2007	
	D	00	D	000000	A	1.000		✓		-				<ul> <li>Image: A start of the start of</li></ul>	20	-	15-JAN-2002	
	Y	00	Y	000000	<b>A</b>	.000								<ul> <li>Image: A start of the start of</li></ul>	1	<b>v</b>	28-JAN-2003	2
	AA	01	SPACE A	000000	) (A	4.000	✓	<ul> <li>Image: A start of the start of</li></ul>		<ul> <li>Image: A start of the start of</li></ul>					50	-	20-SEP-2000	1
	002	01	002-B	000000	) <b>A</b>	4.000									2	-	15-APR-2002	
	01	01	01	000000	A	.000								<b>v</b>		-	05-FEB-1996	
	01	01	01	199001	) (A	.000		<ul> <li>Image: A start of the start of</li></ul>						-	2	-	15-APR-2002	
	10	01	10	000000	A	2.000		<b>v</b>		<b>v</b>					10	<b>v</b>	11-AUG-2004	
1	100	01	100	000000	A	4.000	✓	<ul> <li>Image: A start of the start of</li></ul>		-				<ul> <li>Image: A start of the start of</li></ul>	100	-	11-AUG-2004	
	16	01	16	000000	A	3.000		-		<b>v</b>				-	16	-	11-AUG-2004	•
Valid ( Mod	Gra le ]	ding	Normal		Desc	ription												

#### **Steps**

Follow these steps to define the grades that are used or accepted for transfer by your organization.

- 1. Access the Grade Code Maintenance Form (SHAGRDE).
- 2. Perform an **Insert Record** function.
- 3. Enter the code for the grade in the **Grade Code** field.
- 4. Select the level code in the **Level** field.
- 5. Enter the grade abbreviation in the **Abbreviation** field.
- 6. Select the term code for the term in which this grade became or will become effective in the **Term** field.
- 7. Enter the status code for this grade in the **Status Ind** field.
- 8. Enter the quality points associated with this grade code/level combination in the **Quality Points** field.
- 9. Click the **Count In** checkboxes for the grades that are to be counted in hours and calculating GPA.

Note: The table at the top of the form identifies what each checkbox means.

10. Click the **Traditional Ind** checkbox if the grade is a traditional grade.

Note: This is used in the CAPP (Curriculum, Advising, and Program Planning) module.

- 11. Click the **Incomplete Grade Ind** checkbox if the grade is an incomplete grade that will be used in incomplete grade processing.
- 12. Select a default grade in the **Incomplete Grade Default** field. This is the grade that the incomplete will default to when the time extension allocated for completing the course expires. The choices will be all of the non-incomplete grades that are active for the same level as the incomplete grade. This field is not required. If it is selected, the **Incomplete Grade Ind** checkbox will be automatically checked.

Note: If the Incomplete Grade Default is not selected for the incomplete grade, you will be prompted to enter the default final grade when entering the incomplete grade.

13. Click the **Web Ind** checkbox if the grade is to be available on the Web for Faculty and Advisors.

14. Enter the appropriate numeric value of the grade in the **Numeric Value** field.

Note: This information is used in repeat course processing.

- 15. Click the **Repeat Ind** checkbox if the associated grade will be included in the repeat process evaluation.
- 16. Perform a **Next Block** function.
- 17. Select the grading mode code(s) for this grade in the **Mode** field.
- 18. Click the **Save** icon.
- 19. Perform a **Previous Block** function.
- 20. Repeat steps 2 17 for each new grade if you need to define more than one grade.
- 21. Click the **Exit** icon.

#### **Purpose**

The purpose of the Grade Code Substitution Form (SHAGRDS) is to develop and maintain grade substitution rules. The checking process occurs when a grade is posted to the student's record and ensures that the grade posted is in agreement with the grading mode that the student selected for the course. These rules must be developed one time for your institution, unless policy changes.

*Example*: A student may have chosen the Pass/Fail grade option for a specific course, but the instructor posted a grade of 'A'. The grade substitution process will convert the 'A' grade to a 'P' (pass) grade for students enrolled for Pass/Fail credit.

Note: If the grade code entered on the class roster does not agree with the grading mode that the student selected for the course, the grade roll process will fail if a substitute grade has not been defined. Errors may be identified, and subsequently corrected, when the Roll Grades to Academic History (SHRROLL) process is run in audit mode.

Grade Substitution Maintene Grade Entered Grade D Y A+ AA 002 01 01 01	Abbreviation C V A+S SPACE A 002-B 01 10	Course Level 00 00 01 01 01 01 01 01 01	Effective Term 000000 000000 000000 000000 000000 0000	Status A A A A A A A A A A A	9999999 ⊻ X ▲ ↓ ↓
Substitute Grade and	Grade Mode		Substituto Crado	Abbroviation	
	σεςτημιση				

### **Banner form**

#### **Steps**

Follow these steps to complete the process.

1. Access the Grade Code Substitution Form (SHAGRDS).

Result: The grades built on the Grade Code Maintenance Form (SHAGRDE) are displayed.

2. Select the grade that would be entered on the class roster for which you want to enter a substitution in the **Grade** field.

Example: Click on A.

- 3. Perform a **Next Block** function.
- 4. Select the grade mode for the selected grade in the **Substitute Grade Mode** field.

Example: Select Pass/Fail.

5. Enter the grade that is to be applied to the student's record if the selected grade is posted in the **Grade** field.

Example: Pass

Note: You can think of it this way; the first block represents the grade a faculty submits (e.g. 'A'). The second block represents the grade mode for which student registered for the class (Pass/Fail). If a faculty submitted an 'A' and the student registered for the class as Pass/Fail, what is the grade they should receive? Answer: Pass.

6. Click the **Save** icon.

Note: If you need to define more grade substitutions, go to the Grade Entered block, and follow step 7.

7. Repeat steps 2 - 6 for each new grade substitution you need to define.

Example: B and C should be a passing grade. D would be a failing grade.

8. Click the **Exit** icon.

#### Introduction

An institution may choose to automatically assign an incomplete grade code for a course when a student has not completed the coursework in the designated timeframe. This processing assumes a course has been extended to help the student finish the assignments. Extensions can be varied in length due to level (undergraduate or graduate), circumstances (illness or family emergency), research opportunities or institution policy. Regardless of the nature of the extension, grades of "incomplete" require closure.

When an incomplete grade has been assigned, it indicates that the course has not been finished. However, a final grade may need to be assigned as the default final grade. The default final grade is a replacement grade for the incomplete grade that is assigned if no manual intervention occurs by the time the extension end date is reached. This processing recognizes incomplete grade code values and automates the conversion of the final grades.

To use this process, your institution should review any existing policies regarding the automation of incomplete grades, or plan to define such policies. The steps for setting up automatic incomplete grade processing are:

- Determine whether to use automated incomplete grade processing. If not using this process, go on to the next section of the workbook.
- Define incomplete grades
- Define extension date defaults
- Define and activate incomplete grading rules

#### **Define Incomplete Grades**

See the Grade Code Maintenance Form (SHAGRDE) in a previous lesson in this workbook. If the Grade Default is not selected for the incomplete grade, the user will be prompted to enter the default final grade when entering the incomplete grade.

#### **Define Extension Date Defaults**

The Extension Date for incomplete grade processing is the date that the default final grade is assigned unless manual override and entry of the actual grade has occurred. The Extension Date(s) for parts-of-term and end of term are set up in the Part of Term and Web Registration Controls window on the Term Control Form (SOATERM).

150	Part of Term	1									
art of erm	Description	Start Date	r End Date IIII	Numbei of Weeks	r Census One Date IIII	Census Two Date IIII	Incomplete Extension Date IIII	Section Override	Faculty Web Midterm Grades	Faculty Web Final Grades	Faculty Web Wai List
	Full Term	01-SEP-2006	19-DEC-2006	16	10-SEP-2006	17-SEP-2006					
N	One Week Certif	01-SEP-2006	19-DEC-2006	16	10-SEP-2006	15-NOV-2006				1	
	First Half Term	01-SEP-2006	12-NOV-2006	8	10-OCT-2006	05-NOV-2006					
	Second Half Terr	13-NOV-2006	12-JAN-2007	8	20-NOV-2006					1	
E1	One Day Course	01-DEC-2006	01-DEC-2006	0	01-DEC-2006						
E2	16 Week Course	02-NOV-2006	22-FEB-2007	16	12-NOV-2006					<ul> <li>Image: A start of the start of</li></ul>	
E3	First 8 Weeks	01-SEP-2006	27-OCT-2006	8	10-SEP-2006					<b>v</b>	
eb I	Registration	Dates									
Start E	Date	End Date	Activity	Date							
			14 DEC 3	0.04							

- 1. Access the Term Control form (SOATERM).
- 2. Select the term in the **Term** field.
- 3. Click on the **Next Block** icon to navigate to the term set up fields.
- 4. Click on the **Next Block** icon to navigate to the part of Term and Web Registration Controls window on SOATERM.
- 5. Add the Incomplete Extension Date for the Parts-of-term and/or the Full Term record.

- 6. Click on the **Save** icon to update the record.
- 7. Click on the **Exit** icon.

#### **Define and Activate Incomplete Grading Rules**

A default term rule can be set up for automated incomplete grade processing. You can also define multiple default rules within the effective term that differ by level. When incomplete grade processing is active (turned on) and incomplete grades have been assigned and rolled to history, the default final grade will be substituted as the final grade, during the automated process, in the case that the coursework has not been completed and the grade has not been manually updated by the instructor. The instructor can override the default final grade when it has been assigned and before it is rolled, if override permission has been granted.

The Incomplete Grade Rules Form (SHAINCG) is used to set up the rules for automated incomplete grade processing. Unique rules can be created by effective term and level. The system required term value of *000000* is delivered to reflect that incomplete grade processing is inactive (turned off) as of any prior time period. This record with this term value should exist to indicate that incomplete grading is turned off for all levels.

You can query on these fields:

- Effective Term
- Level
- Incomplete Grade Processing
- Override Grade
- Override Grade Date
- Web Display

If a level is not specified, all records for the term will be retrieved. When the form is entered in query mode, you need to reset the checkbox fields, even if it means resetting them to their original state. The checkboxes are meant to restrict the query selection, and can be used in combination. Overrides can be set up on this form also.

#### **Banner form**

ncomplete Gr	ade Rules S	SHAINCG 8.0 (UDCSysT	) 30000000		******			
Effective Term V	Level	Incomplete Grade Processing	Override Grade	Override Grade Date	Web Display	User	Activity Date	System Required
				<ul> <li>Shorten</li> <li>Lengthen</li> <li>Any</li> <li>None</li> </ul>	Y	SATURN	12-168-2008	
200820	UG	V		⊂ Shorten ⊂ Lengthen ® Any ⊂ None	V	DAMYX	18-MAR-2008	
				○ Shorten ○ Lengthen ○ Any ○ None				
				○ Shorten ○ Lengthen ○ Any ○ None				

#### **Steps**

Follow these steps to set up your Incomplete Grade Rules.

- 1. Access the Incomplete Grades Rules Form (SHAINCG)
- 2. Select a value for the **Effective Term** from the drop down list.

Note: This value is validated against the settings in the Term Code Validation Table (STVTERM).

3. Select a value for the Level from the drop down list.

Note: The list of values is taken from the Level Code Validation form (STVLEVL).

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

4. Observe the **Incomplete Grade Processing** checkbox. If it is checked, it indicates that the term/level rule is active for incomplete grade processing.

Note: The default is for the box to be checked.

5. Observe the **Override Grade** checkbox. If it is checked, it indicates that a default, incomplete, final grade may be overridden by an instructor.

Note: The default is for the box to be checked.

- 6. Observe the **Override Grade Date** radio group. These settings indicate whether faculty members have permission to override the extension date for incomplete grades in relation to the default extension date. The default date may be shortened, (*S*), extended, (*L*), either (*any*), or not allowed to be changed (*none*). The default setting is *A* (*Any*).
- 7. Observe the **Web Display** checkbox. If checked, the incomplete, default, substitute and final grades and extension date values are displayed in Banner Student Self Service on the Final Grades page. If unchecked, only the incomplete grade code is displayed. The default setting is checked.
- 8. Observe the **User ID** field. This is the User ID of the one who last updated this record. This field is display only.
- 9. Observe the **Activity Date** field. This is the date on which the record was last updated. This field is display only.
- 10. Click on the **Save** icon to update the Incomplete Grade Rules form.
- 11. Click on the **Exit** icon.

#### **Purpose**

-

The Academic Standing Rules Form (SHAACST) establishes the rules used to determine a student's End of Term Academic Standing and qualification for term specific honors.

Academic Standing rules are defined by level and college.

Calculation of Academic Standing is optional; however it is part of the overall end of term processing and would need to be run at this time.

#### Banner form

aAcademic Standing Rules SHAACST 8.0 Level: CR ▼ Credit	(BAN8) 2000000000000000000000000000000000000	r donation and a second and a	20000000000000000000000 <b>± ×</b>
Academic Difficulty Rules Sequence Term Status Number	———Hours——— Low High Type		To Status
200721 P1 Term: Probation Indicator Cumulative:	Overall GPA:		
Term:     Probation Indicator     Cumulative:	Overall GPA:		
Probation Indicator Cumulative:	Overall GPA:		
Term:     Term:     Probation Indicator     Cumulative:	Overall GPA:		

#### **Steps**

Follow these steps to define academic standing rules.

- 1. Access the Academic Standing Rules Form (SHAACST).
- 2. Enter the desired level code in the **Level** field.
- 3. Enter the college code in the **College** field.
- 4. Perform a **Next Block** function.
- 5. Develop academic standing rules, based on institutional policy.
- 6. Click the Save icon.
- 7. Select **Dean's List** and **Exclude Grade Rules** from the **Options** menu.
- 8. Develop dean's list rules, based on institutional policy.
- 9. Click the Save icon.
- 10. Click the **Exit** icon.

# Degree Status Codes

#### **Purpose**

The Degree Status Codes Validation Form (STVDEGS) is used to maintain the various statuses that reflect the stages of degree processing, (such as Pending, Awarded, etc.).

#### **Banner form**

ree tus de	Description	Awarded Indicator	Next Degree Status	System Required	Curriculum Status 💌	Activity Date
V	Awarded	Awarded 🔻				03-JAN-1995
	Pending	Pending 🔻	AW			03-JAN-1995
>	Sought	Select 🔻		Image: A start and a start		03-JAN-1995
				□ [		
				□ [		
		-		□ [		
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٦.			i m	i i		
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Ξ.				i –		

#### **Steps**

Follow these steps to view a Degree Status code. You must have proper permissions to make any changes to this form.

- 1. Access the Transcript Type Code Validation Form (STVDEGS).
- 2. Note the codes for the degree statuses in the **Code** field. Once a degree status code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the degree status code record cannot be deleted.
- 3. Observe the **Description** field for each code.
- 4. Observe the **Awarded Indicator**. whether this status means that the degree is awarded. Valid values are:
  - Awarded (A)
  - Pending (P)
  - Select... (null) not awarded or pending
- 5. Observe the **Next Degree Status** field. Indicator for the next step in degree status. For example, you might have a degree status *Pending* who next status would be *Awarded*.

This field is used in conjunction with the **Update Next Degree Status** checkbox on the Graduation Status Validation Form (STVGRST). If the **Update Next Degree Status** checkbox on STVGRST is checked for the graduation status entered, then the current degree status code on the Degrees and Other Formal Awards Form (SHADEGR) will be updated with the next degree status maintained on this validation form.

Example: If the student's current degree status is Undergraduate Pending Award (*UP*), and the graduation status is being updated to Finalized, and the finalized graduation status code is checked in the **Update Next Degree Status** checkbox, then the degree status will automatically be set to Undergraduate Awarded (*UA*).

- 6. Observe the setting of the **System Required** checkbox. If this checkbox is checked, the validation table record cannot be deleted.
- 7. Select the **Search** button for this field to access the Curriculum Status (STVCSTS) list. This is the code of the curriculum status for this degree status code.
- Note: When degree status codes are created on STVDEGS, a curriculum status code of *Awarded* cannot be entered if the row being created has the *Awarded* Indicator set to a value other than *A*. In addition, a curriculum status code of *Pending* can not be entered if the *Awarded* Indicator does not equal *P*.

- 9. Observe the **Activity Date** field. This is the date on which the record was last updated. This field is display only.
- 10. Having verified that this Validation Table exists, Click the **Exit** icon.

#### Purpose

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The Graduation Status Code Validation form (STVGRST) reflects the various stages of graduation processing, such as Applied for Graduation, Submitted for Advisor Review, Requirements Satisfied-Ready to Graduate, Requirements Not Met-Will Not Graduate, etc.

## **Banner form**

🙀 Graduation Status Validation STVGRST 8.0 (BAN8_WIN) 000000000000000000000000000000000000											
		Update Next Degree	ie								
Code	Description	Status	Activity Date								
GRA	Graduated		05-JUN-2006								
NO	Will not Graduate	] 🗆	06-JAN-1995								
PG	Plans to Graduate	] 🗆	06-JAN-1995								
WG	Will Graduate	] 🗆	04-MAY-1995								
		]									
		]									
		) 🗖									
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#### **Steps**

Follow these steps to create or review the graduation status codes. Note that you must have proper permissions to modify these codes.

- 1. Access the Graduation Status Code Validation Form (STVGRST).
- 2. Observe the **Graduation Status Code**. Once a graduation status code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the graduation status code record cannot be deleted.

- 3. Observe the **Description** field for the Graduation Status Code.
- 4. Observe the Next Degree Status checkbox. The checkbox used to specify whether the student's degree status is to be automatically updated when the graduation status is entered or modified. This field works in conjunction with the Next Degree Status field, which is maintained on the Degree Status Code Validation Form (STVDEGS).

If the **Update Next Degree Status** checkbox is checked for the graduation status entered, then the current Degree Status Code on the Degrees and Other Formal Awards Form (SHADEGR) will be updated with the next degree status maintained on STVDEGS.

Example: If the student's current degree status is Undergraduate Pending Award (*UP*), and the graduation status is being updated to *Finalized*, and the *Finalized* graduation status code has the **Update Next Degree Status** checkbox checked, then the degree status will automatically be set to Undergraduate Awarded (*UA*).

- 5. Observe the **Activity Date** field. This is the date on which the record was last updated. This field is display only.
- 6. Observe the settings for each of the codes.
- 7. After verifying the Graduation Status codes, Click the **Exit** icon.
#### **Purpose**

The Graduation Ceremony form (SHACRMY) is used to create and maintain ceremony information, providing the ceremony code already exists on the Ceremony Type Validation Form (STVCERT). Queries are available for events, buildings, and rooms from either the First Choice or Second Choice sections of the Events block of the form. A ceremony must exist on this form before attendees may be associated with it on the Ceremony Attendance Form (SHACATT). You can make use of Event Management information by entering data in the **Event** field or leave the field blank. If an existing event fro the Event Form (SLAEVNT) is entered, the **Building** and **Room** fields will default in and cannot be changed on SHACATT. If the **Event** field is left blank, you are able to enter the rest of the event information.

You can also use this form to set up a "main" ceremony and copy it to each new term.

Ceremony SHACRMY 8.0 (BAN8_WIN) 2000000000000000000000000000000000000	Term:
Events	
First Choice Event: Site: Site: Building: Date: Time:	Second Choice Event: Site: Site: Building: Comment Date: Time:
Ceremony Limits Maximum Student Tickets: Maximum Non-Student Tickets: Maximum Capacity:	Required Dress Code:   Activity Date:

#### **Banner form**

#### **Steps**

Follow these steps to create Graduation Ceremony information.

- 1. Access the Ceremony form (SHACRMY).
- 2. Select the ceremony type in the **Ceremony** field from the drop down list.
- 3. Select the appropriate term in the **Term** field.
- 4. Click on the **Next Block** icon.
- 5. Search for and enter the event in the **Event** field.

Note: If an existing event is entered (from SLAEVNT), the **Building** and **Room** fields will default. If the **Event** field is left blank, you can complete the remaining event information.

- 6. Click on the **Save** icon.
- 7. Click on the **Exit** icon.

#### **Purpose**

The Source/Background Access Form (SOASBGA) is used to create institution-specific information that includes host name, remote directory, username, and password information for the File Transfer Protocol (FTP) location for the XML transcript transmission. The form also includes an indicator that controls whether the transcript transmission will use the specific information on SOASBGA or the default FTP location information on SHACTRL.

Note: Password information is encrypted when entered and is not accessible without being unencrypted.

#### **Banner form**

a Source/Background Access SOASBGA 8.0 (BAN8) 000000000000000000000000000000000000	************************************
Source or Background Institution:	
File Transfer Protocol Location	Use Default Location
Remote Directory: Username: Password:	

#### **Steps**

Follow these steps to use the form.

- 8. Access the Source/Background Access Form (SOASBGA).
- 9. Select the Source/background institution code of the institution sending the XML transcript in the **Source or Background Institution** field.
- 10. Perform a **Next Block** function.
- 11. Enter the host name to which the FTP process can connect to transmit the XML transcript, such as *ediserver.reg.utexas.edu* in the **Host Name** field.
- 12. Enter the remote directory on the host to which the FTP process can connect to transmit the XML transcript, such as */usr/local/tran/ftp/testftp* in the **Remote Directory** field.
- 13. Enter the username of the host who is exporting the XML transcript to the remote system in the **Username** field.
- 14. Enter the password of the host who is exporting the XML transcript to the remote system in the **Password** field.

Note: The password is encrypted when entered and is *not* accessible without any unencryption.

15. Select the Use Default Location checkbox if you would like to use the default FTP location defined on SHACTRL for this institution.

Note: If the **Use Default (FTP) Location** checkbox is unchecked (set to *N*), then the FTP information in this form will be used for XML transcript transmissions. If no information is entered in SOASBGA, or if the **Use Default (FTP) Location** checkbox is checked (set to *Y*), then the FTP information on SHACTRL will be used to transmit the transcript file

- 16. Click the **Save** icon.
- 17. Click the Exit icon.

# Self Check

#### **Directions**

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

#### **Question 1**

What Banner form do you use to define how repeat rules should be applied to the course repeat functions?

#### **Question 2**

Which Banner form is used to create transcript types?

#### **Question 3**

Which Banner form is used to define transcript types?

#### **Question 4**

What Banner form do you use to define grades that are accepted by your institution for transfer credit?

#### **Question 5**

How do you make a grade available on the Web?

#### **Question 6**

On the Grade Code Maintenance Form (SHAGRDE), which **Count In** check boxes should you select?

#### **Question 7**

What is the Grade Code Substitution Form (SHAGRDS) used for?

## **Answer Key for Self Check**

#### **Question 1**

What Banner form do you use to define how repeat rules should be applied to the course repeat functions?

Use Repeat/Multiple Course Rules Form (SHARPTR).

#### **Question 2**

Which Banner form is used to create transcript types?

Use Transcript Type Code Validation Form (STVTPRT) to create transcript types.

#### **Question 3**

Which Banner form is used to define transcript types?

Use Transcript Type Rules Form (SHATPRT) to define transcript types.

#### **Question 4**

What Banner form do you use to define grades that are accepted by your institution for transfer credit?

Use Transfer Grade Code Maintenance Form (SHATGRD).

#### **Question 5**

How do you make a grade available on the Web?

Select the Web Ind check box on the Grade Code Maintenance Form (SHAGRDE).

#### **Question 6**

On the Grade Code Maintenance Form (SHAGRDE), which **Count In** checkboxes should you select?

Depending on the way your institution uses them, the ones that should be counted in calculating GPA, (varies from institution to institution depending upon the way they do business).You can also select the Count in Attempted, Count in Enrollment, Count in Passed check boxes.

#### **Question 7**

What is the Grade Code Substitution Form (SHAGRDS) used for?

Defining grade substitutions

# Day-to-Day Operations

#### **Section goal**

The goal of this section is to explain the regular process and detail the procedures to handle end of term processes, awarding of degrees, and producing academic transcripts at your institution.

#### **Objectives**

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

- build, enter, and roll grades
- change/maintain grades
- calculate academic standing
- produce grade mailers
- add/change/award degrees
- use the mass entry graduation process
- review academic history online
- print transcripts
- process XML transcripts
- generate a number of reports and processes.

# Introduction

#### About the process

This course is intended to teach the participant about setting up and running the end of term processes, producing grade reports, transcripts and maintaining degree records.

#### Flow diagram

This diagram highlights the process Academic History follows.



#### What happens

Stage	Description
	Registrar
1	Runs end of term processes:
	Produces class/grade rosters
	<ul> <li>Enters and/or verifies grades submitted by instructor</li> </ul>
	Rolls grades to academic history
	Runs repeat processing
	Runs GPA calculation process
	Runs Academic Standing
	Produces Grade Mailers
	<ul> <li>Updates student type (IPEDS reporting)</li> </ul>
2a	Verifies degree information
2b	Awards degrees
2c	Updates graduation ceremony and diploma information
3a	Receives transcript request from student and enters in System
3b	Produces and mails transcripts
	Student
4a	Requests transcripts
4b	Receives transcripts
52	Receives degree
5b	Attends graduation ceremony, receives diploma

The stages of the process are described in this table.

### **Processing Grades**

#### Introduction

When students enroll in a class, the system automatically creates the Class Roster Form (SFASLST) for the course reference number (CRN) for the class. Students are listed in sequence order – the order in which they registered for the course.

After enrollment is closed, the Class Roster Report (SFRSLST) needs to be run in order for rosters to be distributed to instructors for grade submission. Even if your institution does not distribute grade rosters, this process should be run (output to a file, not to a printer) in order to alphabetize the names on the rosters.

The Class Roster Form (SFASLST) is used to enter grades and optionally roll them to Academic History. Faculty and/or administrative staff enter mid-term and final grades on the SFASLST form or using Self-Service for Faculty & Advisors (if available at your institution). Once grades are entered, they can be rolled to academic history using the SFASLST form or the Grade Roll to Academic History Process (SHRROLL).

Class Rost	cer SFASLST 8.0 (BAN G2001 Spring Term	18) 000000000000000000000000000000000000			Roll De	gree Award Status:	5000000005 1
Sequence Rolled	ID Grade Comment:	Name Status	Status M Date (	idterm Final Grade Grade V V	Grade Incomple Mode Final Gra V	te Extension de Date IIII	Hours
Rolled	Grade Comment:						
Rolled	Grade Comment:						
Rolled	Grade Comment:						
Rolled	Grade Comment:						
Rolled	Grade Comment:						

#### **Banner form**

#### **Steps**

Follow these steps to enter and roll grades for a course reference number (CRN).

- 1. Access the Class Roster Form (SFASLST).
- 2. Select the term for which you want to enter grades in the **Term** field.
- 3. Enter the course reference number for which you want to enter grades in the **CRN** field.
- 4. Select the **Roll** checkbox.

Note: This box may also be left unchecked if you do not wish to roll grades when changes are saved.

Note: It is recommended that your institution develop procedures using the Roll Grades to History Process (SHRROLL) as described below. All invalid grades and grade substitutions may be reviewed and errors corrected prior to rolling grades to academic history.

5. Enter a value in the **Degree Award Status** field, if applicable.

Note: This field can be left blank if it does not apply.

- 6. Perform a **Next Block** function.
- 7. Enter a final grade for each student in the **Final Grade** field.
- If the Final Grade is an incomplete grade code value then the Incomplete Final Grade field is eligible to replace the value in the Final Grade field after the Extension Date expires. If overrides are permitted, you can modify these fields.
- 9. Click the **Save** icon.

Note: Make a note of the Term code and ID of one of the students for whom you just entered grades.

10. Click the **Exit** icon.

#### Introduction

This form is used for CEU sections where grades and hours of attendance must be maintained. There are three processes which may be accomplished on this form.

The first displays the section information and the students enrolled in the course. The records will be ordered by entry into the course. This can be used to monitor sections during registration. Section information must be entered in the Schedule Form (SSASECT) prior to accessing this information. In order to get the student information on the form, the student needs to be registered for the section for the term.

The second process allows for entry of final grades. This includes manual entry and the automated processing through the rolling of grades to history. In addition, grades may be rolled for students with a specific Degree Award Status if that field is set.

The third process allows the entry and maintenance of the attendance hours in the **Hours Attended** field. This non-required field may be updated with the number of hours the person attended the section.

The principal difference between this form and the Class Roster Form (SFASLST) is SFAALST will capture the last date of attendance and DOES NOT capture the midterm grade. For many institutions collecting final grades, these aspects make SFAALST the grade entry form of choice because of the Financial Aid requirement to capture last date of attendance for certain types of grades.

#### **Banner form**

Class Atte	endance Ro 200720 💌	oster SFAALS )Spring 2007	T 8.0 (BAN8_WIN) 39393 CRN:		**********	Constantine Roll	000000000 Degree Awa	rd Status: Select ▼
Sequence Rolled	e ID	e Comment:	Name Status	Status Fin Date Gra 	al Grading Inco de Mode Fina ]	omplete Extension I Grade Date V III	Credit Hours	Hours Last Attendance Attended Date
Rolled Rolled	Grad	e Comment:						
Rolled	Grad	e Comment:						
Rolled Rolled	Grad	e Comment:	· · · · · · · · · · · · · · · · · · ·					

#### Steps

Follow these steps to enter and roll grades for a course reference number (CRN).

- 1. Access the Class Attendance Roster Form (SFAALST).
- 2. Select the term for which you want to enter grades in the **Term** field.
- 3. Enter the course reference number for which you want to enter grades in the **CRN** field.
- 4. Select the **Roll** checkbox.

Note: This box may also be left unchecked if you do not wish to roll grades when changes are saved.

Note: It is recommended that your institution develop procedures using the Roll Grades to History Process (SHRROLL) as described below. All invalid grades and grade substitutions may be reviewed and errors corrected prior to rolling grades to academic history.

5. Enter a value in the **Degree Award Status** field, if applicable.

Note: This field can be left blank if it does not apply.

- 6. Perform a **Next Block** function.
- 7. Enter a final grade for each student in the **Final Grade** field.
- 8. If the **Final Grade** is an incomplete grade code value then the **Incomplete Final Grade** field is eligible to replace the value in the **Final Grade** field after the **Extension Date** expires. If overrides are permitted, you can modify these fields.
- 9. Observe the **Credit Hours** field. This field is populated from the credit hours defined for this course on the Course Section Detail form (SSASECT).
- 10. Enter the number of hours attended in the Hours Attended field.

Note: This non-required field may be used to track the number of hours the student attended the section.

11. Enter a value into the Last Attendance Date field.

Note: This field allows updates and queries on the last date of attendance in a particular class for a student. This can help institutions determine the last date of attendance.

12. Click the **Save** icon.

Note: Make a note of the Term code and ID of one of the students for whom you just entered grades.

13. Click the **Exit** icon.

#### Introduction

The Roll Grades to History Process SHRROLL rolls grades entered through the Class Roster Form (SFASLST) and/or the Class Attendance Roster Form (SFAALST) to academic history. This is the recommended process for rolling grades at the end of the term when there are a lot of grades to roll to history.

The Grade Roll to Academic History Process (SHRROLL) is used to roll student grades to Academic History, including any incomplete final grades and extension dates.

Running the process in AUDIT mode will produce an error report, which lists all invalid grades and grade substitutions. Using this report, review the invalid grades and make corrections on the class rosters (SFASLST). Once all errors are corrected, run the process in UPDATE mode committing the grades to Academic History.

This process rolls grades from the Class Roster Form (SFASLST) into Academic History. (Remember grades can also be rolled through the Class Roster Form, SFASLST form and the Class Attendance Roster Form, SFAALST). The grade roll process creates a term header record in the Term Course Maintenance Form (SHAINST) and copies courses from Registration to the Course Maintenance form (SHATCKN) in Academic History.

#### **Key points**

The Grade Roll Process (SHRROLL) is used to update these types of information:

- Course AND degree information
- Graduation data
- If data is entered on the Learner Curriculum (LCUR) record, it uses that information in the creation of the degree record
- If the data is "null" in the Learner Curriculum record (LCUR), it uses the data from Student Base Record Table (SGBSTDN) (for example, Expected Graduation Date and Term Year)

#### **Banner form**

rocess	s: SHRROLL Grade Roll To Academic History	Parameter Set:
rinte	er Control	
rinter	: DATABASE Special Print:	Lines: 55 Submit Time:
aran umbei	neter Values r Parameters V	Values V
01	Term Code	200700
02	Start Range From Date	
03	Start Range To Date	
04	Part-of-Term Code	%
05	Course Reference Number	%
06	User ID	BATCH
07	Report Mode(A=Audit,U=Update)	U
08	Print Selection(A=All,E=Error)	А
NGTH ter te	: 6 TYPE: Character O/R: Required M/S: Single rm to be processed.	
uhmi	ission	
uDIIII		

#### **Steps**

Follow these steps to complete the batch process for rolling grades to Academic History.

- 1. Access the Roll Grades to History Process (SHRROLL).
- 2. Select the desired printer in the **Printer** field, or type in the word *DATABASE* to send the output to the database for review and/or future printing.
- 3. Enter these parameter values.

Parameter	Value
Term Code	Enter term to be processed.
Start Range From Date	Enter a date.
	Note: This is generally only used when rolling open learning courses that fall outside of the term.
Start Range To Date	Enter a date.
	Note: This is generally only used when rolling open learning courses that fall outside of the term.

Parameter	Value
Part of Term Code	Enter part of term code or % for all part of term.
Course Reference Number	Enter course reference number or % for all CRNs.
User ID	Enter the User ID to be stored with grade records.
Report Mode (A=Audit, U=Update)	Enter <i>A</i> or <i>U</i> . Note: First run the process in AUDIT
	mode, printing only Errors.
Print Selection (A=All, E-Error)	Enter <i>A</i> or <i>E</i> .
Grade Term	Scroll and enter the grade term to be recorded.
	Note: This is generally only used when rolling Open Learning coursework.
Roll Long Section Title	Enter $Y$ to roll the syllabus long section title.

- 4. Perform a **Next Block** function.
- 5. Select the **Save Parameter Set as** checkbox if you want to save these parameters for future use.
- 6. Enter a name and description for your parameters in the **Name** and **Description** fields.
- 7. Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.
- 8. Click the **Save** icon.
- 9. Select **Review Output** from the **Options** menu to review the results of the process.
- 10. Make any necessary grade adjustments on the Class Roster (SFASLST).
- 11. Run the process again, in AUDIT mode, making sure there are no errors (invalid grades) received.

- 12. Run the process in UPDATE mode, which will update the System with the grades for the term.
- 13. Click the **Exit** icon.

#### Introduction

This process is used to automatically update incomplete grades to final grades. If an incomplete grade is found on Academic History for any course within the specified terms, and its grade extension date is less than or equal to the current system date, it is selected for processing.

Note: The process scans only Academic History records. All grades on the class roster that have not yet been rolled are still considered to be in-process. The grade code values that are displayed on SFAALST, SFASLST, and in Banner Faculty and Advisor Self-Service are only those grade codes that were last entered on the class roster. Any grades that have been subsequently updated in history are not reflected in the roster.

The grade extension date for incomplete grades is compared against the system date to determine whether a grade change needs to occur. If a grade change is needed, a new grade entry is created for the course in the student's academic history. If the system date is greater than the incomplete extension date, then a new grade entry is inserted, but with the final grade code changed from the incomplete grade entry to the replacement final grade. The process also performs checking for grade substitution. Grade substitution can replace the updated grade with a substitute grade, based upon the grade mode associated with the student that was taking the course. A GPA recalculation is then performed when the Calculate GPA parameter is set to *Y*, and the process is run in Update Mode.

The process can be run in Audit Mode to forecast automated grade change results for upcoming grade conversions. The Future Date parameter can be used to forecast future results. No GPA calculation is performed in Audit Mode.

#### **Banner form**

Printer:	▼ Special Print:	Lines: 55 Submit Time:
'aramet lumber	er Values Parameters	Values
01	Term Code	
02	Level Code	
03	Course Reference Number (CRN)	
04	Reason Code	
05	Print Student ID	I
06	Page Break	т
07	Run Mode	A
08	Future Date	
ENGTH: 6	TYPE: Character O/R: Required M/S: Multiple	
ubmissi Save Par	(or terms) to be processed.  rameter Set as Name: Description:  ss Submission Controls GJAPCTL 8.0 (SMPL8) WWWWWWW	C Hold • Submit
nter Term ubmissi Save Par Reproce Proce	(or terms) to be processed.	Hold © Submit
ubmissi Save Par ØProce Proce Prin Print	(or terms) to be processed.	Hold © Submit Parameter Set: Lines: 55 Submit Time:
ubmissi Save Par Save Par Proce Proce Print	(or terms) to be processed.	Hold © Submit Parameter Set: Lines: 55 Submit Time:
ubmissi Save Par Proce Print Print Para Num	(or terms) to be processed.	Hold • Submit Parameter Set: Lines: 55 Submit Time: Values Values
ubmissi Save Par Proce Print Print Qara Num	(or terms) to be processed. ion rameter Set as Name: Description:  ss Submission Controls GJAPCTL 0.0 (SMPL0)  Special Print: ess: SHRCINC  Incomplete Grade Process ter Control ter Control ter: Parameter Values ber Parameters  Print Student ID	Hold • Submit Parameter Set: Lines: 55 Submit Time: Values Values
ubmissi Save Par Save Par Proce Print Print Qara Numi	(or terms) to be processed.	Hold • Submit Parameter Set:  Values Values I T
ubmissi Save Par Save Par Proce Print Print Qara Numi 05 06	(or terms) to be processed.	Hold • Submit Parameter Set: Values Values I A
ubmissi Save Par Save Par Proce Print Print Og 06 07 08	(or terms) to be processed.	Hold • Submit Parameter Set: Values Values I A
ubmissi Save Par Save Par Proce Print Print OG 06 07 08 09	(or terms) to be processed. ion rameter Set as Name: Description:  ss Submission Controls GJAPCTL 0.0 (SMPL0) WWWWWWWW ess: SHRCINC  Incomplete Grade Process ter Control ter:  Special Print:  ameter Values ber Parameters  Print Student ID Page Break Run Mode Future Date Grade Comment	Hold  Submit  Parameter Set:  Values  Values  I  A
ubmissi Save Par Save Par Proce Print Print 06 07 08 09 10	(or terms) to be processed.	Hold <ul> <li>Submit</li> </ul> Parameter Set: <ul> <li>I</li> <li>I</li></ul>
ubmissi Save Par Proce Proce Print Print 06 07 08 09 10 11	(or terms) to be processed. ion rameter Set as Name: Description:  ss Submission Controls GJAPCTL 0.0 (SMPL0) WWWWWWWW ess: SHRCINC  Incomplete Grade Process ter Control ter:  Print Student ID Page Break Run Mode Future Date Grade Comment Calculate GPA Print Grade Substitutions	Hold       ● Submit         Parameter Set:       ▼         Lines:       55         Submit Time:       ▼         I       ▼         I       ■         A       ■         N       ▼         Y       ■
ubmissi Save Par Proce Print Print 06 07 08 09 10 11 12	(or terms) to be processed. ion rameter Set as Name: Description:  ss Submission Controls GJAPCTL 0.0 (SMPL0) WWWWWWWW ess: SHRCINC  Incomplete Grade Process ter Control rer:  Print Student ID Page Break Run Mode Future Date Grade Comment Calculate GPA Print Grade Substitutions User ID	Hold       ● Submit         Parameter Set:       ▼         Lines:       55         Submit Time:       ▼         I       I         I       I         A       I         N       Y         I       I         N       Y         I       I
ubmissi Save Par Save Par Proce Print Print Of 06 07 08 09 10 11 12 LENG	(or terms) to be processed. ion rameter Set as Name: Description:  ss Submission Controls GJAPCTL 0.0 (SMPL0) WWWWWWWW ess: SHRCINC  Incomplete Grade Process ter Control rer:  Print Student ID Page Break Run Mode Future Date Grade Comment Calculate GPA Print Grade Substitutions User ID TH: 1 TYPE: Character O/R: Required M/S: Single	Hold       ● Submit         Parameter Set:       ▼         Lines:       55       Submit Time:         Values       ▼         I       I         A       I         N       Y         I       I         N       Y         I       I

#### **Steps**

Follow these steps to use the Incomplete Grades Process.

- 1. Access the Incomplete Grades Process (SHRCINC).
- 2. Click on the **Next Block** icon to access the Printer Control block.
- 3. Select the printer you wish to use. In most cases, selecting *DATABASE* will cause the results to be displayed on the computer monitor.
- 4. Click **Next Block** to access the Parameter Values block.
- 5. Enter the term code value(s) for automated processing of incomplete grades in the **Term Code** parameter.
- 6. Enter the level code value(s) for automated processing of incomplete grades in the **Level Code** parameter if you wish to restrict processing to specific levels.
- Enter CRNs for courses for automated processing of incomplete grades in the Course Reference Number (CRN) parameter, if you wish to restrict the processing to only these CRNs within the term.
- 8. Enter a user-defined reason code to be stored with grade change entries that indicates the reason or justification for the grade change in the **Reason Code** parameter.
- 9. Enter *I* to include/print the student ID or *E* to exclude/not print the ID in the **Print Student ID** parameter. The default is *I*.
- 10. Enter *T* to break the output by change of term, *C* to break the output by change of course within term, or *N* to have no forced page brake in the **Page Break** parameter. The default is *T*.
- 11. Enter *A* to run the process in Audit Mode and forecast automated grade change results or *U* to run the process in Update Mode and update the database in the **Run Mode** parameter. The default is *A*.
- 12. Enter a date in the future (DD-MON-YYYY format) to compare to extension dates of entries on file in the **Future Date** parameter. This date takes the place of the system date. This parameter can only be used in Audit Mode.
- 13. Enter a grade comment code to be stored with grade change entries in the **Grade Comment** parameter. You may want to define a grade comment code to reflect that this grade change entry is the result of automated incomplete grade processing.
- 14. Enter *Y* to calculate the GPA for each student that is processed or *N* to not calculate the GPA in the **Calculate GPA** parameter. The default is *N*.

- 15. Enter *Y* to print grade substitutions or *N* to not print grade substitutions in the **Print Grade Substitutions** parameter. The default is *Y*.
- 16. Enter the user ID to be stored with the grade records in the User ID parameter.
- 17. Click **Next Block** to access the Submission Block.
- 18. If you wish to save this parameter set so that you can run it again, click on the **Save Parameter Set As** checkbox. If not, skip to step 21.
- 19. Enter the name of the parameter set to be saved in the **Name** field.
- 20. Enter the description for the parameter set to be saved in the **Description** field.
- 21. Select the **Hold** radio button if you wish to submit this as a Batch Job.
- 22. Select the **Submit** radio button if you wish to run this process immediately (this is the default setting).
- 23. Click the **Save** icon to create the Batch job or run the process immediately. If you created a Batch job, skip to step \_\_\_.
- 24. Observe the report that is produced by the process.
- 25. Click the **Exit** icon to close the report.
- 26. Click the **Exit** icon to close the process.

# Processing Repeat Courses

#### Introduction

Repeat limits are developed for individual courses using the Basic Course Information Form (SCACRSE).

#### **Banner form**

🙀 Basic Course Informati	on SCACRSE 8.0 (BAN8) 2000000000000			0000000000			×≥ 000000000000 <u>≤</u> ×
Subject: AMST Course Title:	P American Studies	Course:	300 🛡	Term: [	LG2001 🔻		
Course Details							
From Term: LG2001	Сору 🍺	To Term:	999999				
Course Title:	American Studies II						
College:	01 College of Arts & Sciences		Hours				High
Division:			CEU or Credit:	3.000	None	OOr OTo	
Department:	0000 Undeclared Department		Billing:	3.000	None	Or OTo	
Status:	A Active		Lecture:		None	OOr OTo	
Approval:	1 Degree		Lab:		None	OOr OTo	
CIP:	000001 Liberal/General Studies		Other:		None	OOr OTe	
Prerequisite Waiver:	1 Dean of Instruction		Contact:		None	OOr OTe	
Duration:	5.00 DAYS Days						
Continuing Educatio	n		Repeat Detail	s			
Tuition Waiver			Limit	_	Maximu	m Hours	
Additional Fees			Reneat Status:		Haximu		
CAPP Areas for Pre	requisites		Repeat Status.	لت ر			
Syllabus Exists							
ma sea sea a							

#### **Steps**

Follow these steps to enter repeat information for a course.

- 1. Access the Basic Course Information Form (SCACRSE).
- 2. Select a subject code in the **Subject** field.
- 3. Enter a course number in the **Course** field or use the Search button to find one.
- 4. Enter a term code in the **Term** field or select one from the LOV.
- 5. Perform a **Next Block** function.
- 6. Enter the maximum number of times this course can be taken for credit in the **Limit** field in the **Repeat Details** section.
- 7. Enter the maximum number of credit hours for which this course can be taken for credit in the **Maximum Hours** field.

Note: The **Limit** and **Maximum Hours** fields are invoked in the Registration module according to the status of the Registration Error flags on the Term Control Form (SOATERM) and are calculated in the Academic History module according to the Repeat/Multiple Course Rules Form (SHARPTR). **Limit** and **Maximum Hours** may be used individually or in combination for a course.

8. Enter a repeat status code in the **Repeat Status** field if desired.

Note: This field is informational only and does not control any processing.

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

#### Introduction

The Repeat/Equivalent Course Check Report (SHRRPTS) is used to flag repeated courses.

This process is run to check new courses rolled into Academic History for repeats and/or equivalents. The process takes into account the rules on the Repeat/Multiple Course Rules Form (SHARPTR) and the repeat limits and/or hours established for the course on the Basic Course Information form (SCACRSE) to determine how they should be calculated into the students' records. Any course identified as a repeat or equivalent that should be excluded from a record's calculation of hours and GPA is flagged. The report sorts the output of students into alphabetical order by last name.

#### **Banner form**

rocess	Submission Controls GJAPCTL 8.0 (S10b80) ////////////////////////////////////	Parameter Set:
rinter:	r Control	Lines: 55 Submit Time:
'aram lumber	neter Values r Parameters r	Values
01	Term Code	
02	Level Code	
03	Report or Update	
04	Print Transfer Work	
05	Application Code	
06	Selection Identifier	
07	Creator ID	
08	User ID	
ENGTH: ne Tern ubmis	: 6 TYPE: Character O/R: Required M/S: Single n of the courses to be processed. ssion	

#### **Steps**

Follow these steps to complete the process.

- 1. Access the Repeat/Equivalent Course Check Report (SHRRPTS).
- 2. Select the desired printer in the **Printer** field, or type in the word *DATABASE* to send the output to the database for review and/or future printing.
- 3. Enter these parameter values.

Parameter	Value
Term Code	Enter the term code of the courses to be processed.
Level Code	Enter the level code of the courses to be processed.
Report or Update	Enter <i>R</i> for report only or <i>U</i> for report and update.
Print Transfer Work	Enter $N$ to if you do not want to print transfer course work or enter $Y$ to print transfer course work.
Application Code	Enter the Application Code of the population selection.
Selection Identifier	Enter the Selection Identifier of the population selection.
Creator ID	Enter the ID of the person who created the population selection.
User ID	Enter the ID of the person who last updated the population selection.

- 4. Click the Save Parameter Set as checkbox.
- 5. Enter a name in the **Name** field to save the parameter set.
- 6. Enter a description of the parameter set in the **Description** field.
- 7. For this exercise, select the Submit radio button. Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.

8. Click the **Save** icon to execute the report, (or, if **Hold** is selected, the report is held for later execution).

Result: The Auto hint line displays the job submission number for the report log and list file or the Batch Identifier if the report is held for later execution.

- 9. Select **Review Output** on the **Options** menu to review the report.
- 10. Click the **Exit** icon after reviewing the results.

- 11. Make any necessary adjustments to the Repeat/Multiple Course Rules Form (SHARPTR).
- 12. Repeat steps 1-11 in Audit mode until you are satisfied with the results.
- 13. Run the process again, in UPDATE mode.
- 14. Click the **Exit** icon.

# Calculating GPA

#### Introduction

The Calculate GPA Report (SHRCGPA) is used to calculate the GPA for the selected term and group of students. It calculates both term and cumulative GPA.

#### **Banner form**

rocess 9 Process:	Submission Controls GJAPCTL 8.0 (BAN8) 2022222222222222222222222222222222222	Parameter Set:
Printer Printer:	r Control           PATABASE <ul> <li>Special Print:</li> <li>Image: Special Print:</li> <li>Image: Specin Print:</li></ul>	Lines: Submit Time:
Param Number	Parameters	Values (♥)
01	Term	200220
02	Select All,Rolled or Collector	A
03	Selection Identifier	
04	Application code	
05	Creator ID	
ENGTH:	6 TYPE: Character O/R: Required M/S: Single	
Submie	ssion	
Save F	Parameter Set as Name: Description:	O Hold Submit

#### **Steps**

Follow these steps to complete the process.

- 1. Access the Calculate GPA Report (SHRCGPA).
- 2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Parameter	Value
Term	Enter the term you want to process.
Select All, Rolled or Collector	<ul> <li>Enter <i>A</i> for all, <i>R</i> for rolled or <i>C</i> for collector.</li> <li>Note: Typically this job is run twice if the Repeat/Equivalent Course Check Report (SHRRPTS) process is run.</li> <li>Run SHRCGPA once for the Collector (C) file, then run it again for rolled (R) or all (A) students. This will manage the GPA for previous terms where the repeat process applied, and then the R or A will</li> </ul>
Selection Identifier	Enter the population selection identifier or
Application code	Enter the population selection application code or leave blank for all.
Creator ID	Enter the user ID of the person creating the sub-population.

- 4. Click the Save Parameter Set as checkbox.
- 5. Enter a name and description in the **Name** and **Description** fields.
- 6. Click the **Submit** radio button.
- 7. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file.

- 8. Select **Review Output** on the Options menu to review the report.
- 9. Click the **Exit** icon.

## Viewing a Student's Grade in Academic History

#### Introduction

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The Term Course Maintenance Form (SHAINST) is used to maintain organizational course history, perform grade changes, and identify repeat courses. Selecting <u>Course Maintenance</u> from the **Options** menu takes you to the Course Maintenance Form (SHATCKN). Incomplete final grades and extension dates can be changed on SHATCKN, regardless of the override setting on SHAINCG.

However, after grade changes have been made, the Extension Date and Incomplete Final Grade fields are protected for all entries except the most current entry (highest sequence number). If you do not use automated incomplete grade processing, you can continue to use the Extension Date field.

#### Banner form: SHAINST

🙀 Term Course Maintenance SHAINS	ST 8.0 (BAN8) >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>		$\sim$ $\simeq$ 1000000000000000000000000000000000000
ID: 422139202 Rankins, Philar	na L.		Term: LG2001
Term Header Information	Cohort Information	Stored GPA by Term Calculation	
Term Header			
Data Added By: Osystem	🖲 User		
Record Status: End of Term Academic Standing:	New Record	T	Date:
Dean's List Status: Progress Evaluation:			Date:
Combined Academic Standing: Special Exam Credit:			Date:
Withdrawal Reason: Transfer Institution:			
Duplicate Mailer Request Original Grade Mailer Sent Date:	Date:		
Revised/Duplicate Grade Mailer	Sent Date:		

#### **Banner form: SHATCKN**

Course Maintenance SHATCKN 8     ID: 422139202 ▼Rankins, Phil	.0 (BAN8) 000000000000000000000000000000000000	Term:	LG2001 V Yali	idation Check: Schedule 💌
Course Detail CRN: Section: Schedule Type: Continuing Education Units	Subject: Campus: Part of Term: Co-op Education:	♥ Course: ♥ Repeat: ♥ Comment: ♥ Start/End Dates:	(None)	System:
Grades Sequence Grade Credit Number Grade Mode Hours	Attempted Change Hours Reason	Extension Incomp Date Final Gr	lete Grade Gr.	ade ment User
Level		Primary Level I	ndicator	

#### **Steps**

Follow these steps to view a student's grade in Academic History.

- 1. Access the Term Course Maintenance Form (SHAINST).
- 2. Enter the student's ID in the **ID** field.
- 3. Enter the term code in the **Term** field.
- 4. Perform a **Next Block** function.
- 5. Select Course Maintenance from the **Options** menu.
- 6. Make necessary course title changes in the Course Detail block in the untitled course title field.

Notes: The Course Detail block provides a detail listing of the courses for the term selected in the key block.

Repeated course indicators are checked here.

- 7. Click the Save icon.
- 8. Perform a **Next Block** function.
- 9. Enter a new grade in the **Grade** field.
- 10. Enter the grading mode code in the **Grade Mode** field.
- 11. Enter the number of hours in each of the **Credit Hours** and the **Attempted Hours** fields.
- 12. Select the reason for the change in the **Change Reason** field.
- 13. If desired, make adjustments to the **Incomplete Final Grade** and the **Extension Date** fields.
- 14. Click the **Save** icon.
- 15. Click the **OK** button.
- 16. Click the **Exit** icon to return to the Term Header Block of the Term Course Maintenance Form (SHAINST).
- 17. Click the **Exit** icon.

#### Introduction

The Calculate Academic Standing Process (SHRASTD) calculates a student's academic standing based on the rules established on the Academic Standing Rules Form (SHAACST).

#### **Banner form**

Process	Submission Controls GJAPCTL 8.0 (BAN8) 000000000000000000000000000000000000	$\simeq$		
Process	SHRASTD Calculate Academic Standing	Parameter Set:		
Printe	r Control			
Printer:	: DATABASE Special Print:	Lines: 55 Submit Time:		
Param Number	neter Values r Parameters T	¥alues [♥]		
01	Term	200210		
02	Update Academic Standing	Y		
03	Update Dean's List Standing	N		
04	Audit/Update Mode	U		
05	Calc Min/Max Registration Hrs	N		
06	Pre-registration Future term			
07	Min/Maximum Hours Update/Audit			
08	Update 'USER' source new value			
LENGTH Enter te	: 6 TYPE: Character O/R: Required M/S: Single rm to be processed.			
Submission           Save Parameter Set as         Name:         Description:         O Hold         ® Submit				

#### **Steps**

Follow these steps to complete the process.

- 1. Access the Calculate Academic Standing Process (SHRASTD).
- 2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.
3. Enter these parameter values.

Parameter	Value
Term	Enter the term you want to process.
Update Academic Standing	Enter $Y$ for yes or $N$ for no.
Update Dean's List Standing	Enter $Y$ for yes or $N$ for no.
Audit/ Update Mode	Enter A for audit or U for update mode.
Calc Min/Max Registration Hrs	Enter $Y$ to compare new Academic Standing Code hours to future existing registrations or $N$ to not check.
Pre-registration Future Term	Enter the future term registration to be compared to new Academic Standing Code minimum or maximum regular hours.
Min/Maximum Hours Update/Audit	Enter A or U.
Update 'USER' Source New Value	Y=Min/Max hours overridden
	'USER'

- 4. Click the Save Parameter Set as checkbox.
- 5. Enter a name and description in the **Name** and **Description** fields.
- 6. Click the **Submit** radio button. (Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.)
- 7. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file, or the Batch ID if you chose to hold the process for later submission.

- 8. Select **Review Output** on the **Options** menu to review the report.
- 9. Click the Exit icon to close the report.
- 10. Make any necessary grade adjustments to the Academic Standing Rules (SHAASTD).
- 11. Repeat steps 1-10, running the process in AUDIT mode, and validate the data. Continue to do this until you are satisfied with the results.

- 12. Repeat steps 1-9, running the process in UPDATE mode, which will update the System with the academic standing for the term.
- 13. Click the **Exit** icon.

# **Producing Grade Mailers**

### Introduction

The Grade Mailer Report (SHRGRDE) is used to print grade mailers by type (original, revised, mid-term, and duplicate) for students that have had grades rolled or grade changes made in Academic History.

Grade Mailer status is maintained in the Term Header block of the Term Course Maintenance Form (SHAINST).

For institutions that elect not produce grade mailers, it is recommended that you run this process to update the tables. This will allow duplicate grade mailers to be produced should the students request them.

## **Banner form**

g Process S Process	Submission Controls GJAPCTL 8.0 (BAN8) 20202020202020202020	Parameter Set:
Printer Printer:	• Control           DATABASE           Special Print:	Lines: 55 Submit Time:
Param Number	eter Values Parameters V	Values T
01	Term code	200098
02	Grade Mailer Type	M
03	Print Academic Standing Y/N/O	N
04	Print Deans List (Y/N)	N
05	Print Headings (Y/N)	Y
06	Address Selection Date	07-JAN-2005
07	Address Type	1MA
07	Address Type	2PR 🗸
LENGTH:	6 TYPE: Character O/R: Required M/S: Single	
Submis	ssion Parameter Set as Name: Description:	◯ Hold ● Submit

Follow these steps to run the report.

- 1. Access the Grade Mailer Report (SHRGRDE).
- 2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Parameter	Value
Term Code	Enter the term code for the term you want to process.
Grade Mailer Type	Enter a code from these options:
	D - Duplicate
	R - Revised
	<i>O</i> - Original
	% - All
	M – Mid-term
Print Academic Standing Y/N/O	Enter $Y$ for yes, $N$ for no, or $O$ for override.
Print Dean's List (Y/N)	Enter $Y$ for yes or $N$ for no.
Print Headings (Y/N)	Enter $Y$ for yes or $N$ for no.
Address Selection Date	Enter a date.
Address Type	Enter a priority and address type.
	Example: 1MA (1 <sup>st</sup> priority, mailing address)
Address Type	Enter another priority and address type.
	Example: 2PR (2 <sup>nd</sup> priority, permanent residence)

Parameter	Value
Level Code	Scroll and enter a level code or % for all levels.
Campus Code	Enter a campus code.
Campus Process Request	Enter $Y$ to process by campus.
	Note: Only one campus can be processed at a time.
Campus to be processed	Enter campus code.
	Note: Use this only if Campus Processing is requested. Then enter the campus code. Otherwise, the default is %.
Print Transfer GPA (Y/N)	Enter $Y$ to have the students' transfer GPAs printed on the grade mailers. Enter $N$ to prevent students' transfer GPAs from printing on the grade mailers.
Term Description Print Option	Enter a Y to indicate that the full term description is to be printed on the grade mailer following the level description. Enter N to if you do not wish the full term description to be printed on the grade mailer.
Print upgraded sections	Enter $\gamma$ to print the ungraded sections on the grade mailer.
Ungraded section indicator	Enter a value of up to three characters to print in the grade field of the ungraded sections. This is a free-format field that is not validated against a validation form.
Selection Identifier	Enter the code that identifies the population with which you wish to work.
Application Code	Enter the code that identifies the general area for which the selection identifier was defined.
Creator ID	Enter the user ID of the person who created the population rules.

Parameter	Value
Print expanded fields (Y/N)	Enter $Y$ to print a modified grade mailer with a five position course number and quality points in format 9999.99. This must be selected if the course number is four or more digits. Enter <i>N</i> to print the standard grade mailer.
Sort by (N)Name or (Z)Zip Code	Enter <i>N</i> to sort the output by the student's last name. Enter <i>Z</i> to sort the output by the student's ZIP/Postal Code.
Print Expanded Quality Pts/GPA	Enter $Y$ to print quality points and GPA up to their maximum sizes. Enter $N$ to print quality points as 999.99 and GPA as 9.99. The default is $N$ .

- 4. Click the **Save Parameter Set as** checkbox, if you wish to save the parameter set for future use.
- 5. Enter a name and description in the **Name** and **Description** fields.
- 6. Click the **Submit** radio button.
- 7. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file.

- 8. Select **Review Output** on the **Options** menu to review the report.
- 9. Click the **Exit** icon.
- 10. To verify the grade mailers were successfully run, access the Term Course Maintenance Form (SHAINST).
- 11. Enter an ID number for a student, and the Term.
- 12. Perform a **Next Block** function.
- 13. Verify the Record Status indicator is C = Grade Mailer Processing Complete. Look at the Original Grade Mailer Date Sent at the bottom of the form.

Note: This form is where duplicate grade mailers may be requested.

# **Reviewing Grade Mailer Status/Error Correction**

#### Introduction

The Grade Mailer Status/Error Correction Form (SHAGCOL) provides a means to review and/or update the Grade Collector Table (SHRGCOL). This form shows any grade mailers that could not be produced due to error conditions. The form also shows all grade mailers that are pending, have been produced, and have been printed.

#### **Banner form**

Date	Туре	Error Code	Error Description	ID	Last Name	First Name	Middle Initial
		Н					П
	П						

## **Steps**

Follow these steps to complete the process.

- 1. Access the Grade Mailer Status/Error Correction Form (SHAGCOL).
- 2. Enter the desired term code in the **Term** field.
- 3. Perform a **Next Block** function.
- 4. Review Grade Mailer Errors.
- 5. Select Pending Mailers Query from the Options menu.

- 6. Review Pending Mailers.
- 7. Select **Printed Mailers Query** from the **Options** menu.
- 8. Review Printed Mailers.
- 9. Select **Printer Mailers Corrections** from the **Options** menu.
- 10. Review Printed Mailers Corrections.
- 11. Click the **Exit** icon.

## Introduction

The Student Type Update Report (SHRTYPE) updates the existing student type code maintained on the General Student Form (SGASTDN) for each learner to the next student type, based upon rules defined on the Continuant Terms Rule Form (SOACTRM). This process should be run after the Grade Roll Process (SHRROLL). Codes are defined on the Student Type Code Validation Form (STVSTYP). The student type data is used in IPEDS reporting.

Example: A new student may be classified as a 'New, First Time Freshman'. After successfully completing one term of enrollment, the student's type will be updated to 'Continuing' for the subsequent term(s).

A student must have enrollment status (SFAREGS) that permits registration for the update process to occur. At least one grade must have been rolled to Academic History for the term being processed.

The Student Type Update Report (SHRTYPE) will also review all current and active curricula and process the student type, if available, on the curriculum record (SORLCUR). The existence of an academic history record in the Term Course Maintenance Form (SHAINST) for user-specified terms will trigger the system to change the student type to the next status based on the fact that the student was enrolled.

This report will retrieve curriculum data from the SORLCUR and SORLFOS tables rather than from the original curriculum fields in the General Student module base tables (such as, SRBRECR, SARADAP, SGBSTDN and SHRDGMR).

Process Process	Submission Controls GJAPCTL 8.0 (BAN8) ////////////////////////////////////	Parameter Set:      ▼
Printe Printer:	r Control : OATABASE	Lines: 55 Submit Time:
Param Number	neter Values r Parameters v	¥alues T
01	Rules Term	200700
02	Update Term	200800
03	Mode	
LENGTH Enter th	: 6 TYPE: Character O/R: Required M/S: Single e term for which continuant rules have been defined.	
Submi	ssion Parameter Set as Name: Description:	C Hold • Submit

#### **Steps**

Follow these steps to complete the process.

- 1. Access the Student Type Update Form (SHRTYPE).
- 2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Parameter	Value
Rules Term	Enter the term for which continuant rules have been defined.
Update Term	Enter the term for which student type will be updated.
Mode	Enter A for audit or U for update mode.
	Note: Run the process in AUDIT mode the first time.

Parameter	Value
Process Curriculum	Enter $Y$ to process the student type for the lcurriculum record, or $N$ to process the student type for the learner record. This is optional.

- 4. Click the **Save Parameter Set as** checkbox, if you wish to save the parameters for future use.
- 5. Enter a name and description in the **Name** and **Description** fields.
- 6. Click the **Submit** radio button.
- 7. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file.

8. Select **Review Output** on the **Options** menu to review the report.

Note: Make a note of at least one of the ID numbers, as you will verify changes made to the General Student Record (SGASTDN).

- 9. Click the **Exit** icon.
- 10. Run the process again in UPDATE mode.
- 11. Click the **Exit** icon.
- 12. Verify the update process by accessing the General Student Record (SGASTDN).
- 13. Enter the ID number (as noted in step 8).
- 14. Perform a **Next Block** function.
- 15. Review the current student type on the **Learner** tab. Then, review the current student type on the **Curriculum** tab. Observe which was updated.

Note: Depending on the settings used for the job, one or the other of these fields would be updated, unless the job were run twice with different parameters to update both.

# **Producing Transcripts**

## Introduction

Before you can produce transcripts, you must define the transcript types and their rules. This is usually done when Banner is implemented at your institution, although you might need to create new transcript types or maintain existing ones in the future.

In the Set Up Section you developed these forms:

- Transcript Type Validation Form (STVTPRT)
- Transcript Type Rules Form (SHATPRT)

This lesson covers

- processing a transcript request
- processing transcripts for a population of students
- printing transcripts.

The Transcript Request Form (SHARQTC) is used to enter a transcript request to produce official transcripts immediately or on a delayed basis.

Transcript Request	Philana L.	Holds Exist View Holds: 💌 Override Holds:
Transcript Request		
Request Number: Level: Request Date: Transcript Type:		Hold Processing Hold for Grades Hold for Degrees
Number of Copies: Billing Term:	Official	Electronic Transcript Status Run Date:
Detail: Amount: Student Information Term:		Status: Status Date:
Receipt Number: In-Progress Cutoff Term: Transcript Sent Date:		Self-Service Request Details Self Service Option:
Transcript Print Date: User ID:		Payment Option:

The Academic Transcript Process (SHRTRTC) is used to produce the Banner paper transcript from the system. A transcript must have been requested through the use of the baseline Transcript Request Form (SHARQTC), Student Self-Service transcript request processing, or a baseline transcript population for a transcript identified through the Transcript Population Creation Process (SHRTPOP), in order to be produced through this process.

rinter rinter:	• Control	Lines: 55 Submit Time:
aram umber	eter Values Parameters (▼)	Yaluos T
01	Transcript Population File	N
02	ID and Seq as XXXXXXXX000	%
03	Transcript Type	OFFI
04	Transcript Printer	%
05	Address Selection Date	26-APR-2007
06	Address Priority and Type	2PR
06	Address Priority and Type	1MA
07	Official Transcript Request	Y
ENGTH: indicate	1 TYPE: Character O/R: Optional M/S: Single as transcript population previously selected via SHRTPOP.	

## **Steps**

Follow these steps to generate a transcript for a single student ID.

- 1. Access the Transcript Request Form (SHARQTC).
- 2. Enter the student ID of the student for whom you want to generate a transcript in the **ID** field.
- 3. Perform a **Next Block** function.
- 4. Enter information in the fields as directed by your instructor.
- 5. Click the **Save** icon.
- 6. Click the **Exit** icon.

- 7. Run the Academic Transcript Process (SHRTRTC), being sure to enter the value in the **Printer** field that will send the output to the database as a file and entering other parameter information as directed by your instructor.
- 8. Make a note of the file name and number.
- 9. Access the Saved Output Review Form (GJIREVO).
- 10. Enter *SHRTRTC* in the **Process** field.
- 11. Enter the file number in the **Number** field or select it from the LOV.
- 12. Perform a **Next Block** function to view the file output.
- 13. Click the **Exit** icon.

The Transcript Population Creation Process (SHRTPOP) is used to generate transcripts for a Population Selection.

rinter	r Control	Parameter Set:
aram umber	neter Values	Values
01	Purge Parameter	
02	Selection Term	
03	Student ID	
04	Level(s)	
05	Advisor ID	
06	Degree Code	
07	Degree Status	%
08	Degree Graduation Date	
NGTH: will cau	: 1 TYPE: Character O/R: Optional M/S: Single use purge if selection file already exists, else run aborted.	

## **Steps**

Follow these steps to generate a transcript for a selected population of students.

- 1. Access the Transcript Population Creation Process (SHRTPOP).
- 2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter the parameter values, using the table that follows as a guide.

Note: Consult your instructor to determine the specific values that should be entered for the purposes of this exercise.

Parameter	Value
Purge Parameter	Enter <i>Y</i> if you want the population from the previous transcript purged if the selection file already exists. If you don't enter <i>Y</i> , and a population already exists, the run will be aborted.
Selection Term	Enter the code representing the term for which the report is to be run. Enter % to cause all students with any academic history to be selected. Students must be registered for the requested term and have some academic history (no specific term), or students must have academic history for the requested term.
Student ID	Enter the ID(s) for the selected student(s) for whom you want the transcript to run, or enter % or a NULL value to select all the students.
Level(s)	Enter the level(s) for which you want to run the transcripts, or enter % or a NULL value to select all the levels.
Advisor ID	Enter the ID(s) number of the advisor(s) to whom the transcript is to be restricted, or enter % or a NULL value if there are no restrictions. Only those students assigned to the requested advisor(s) will be selected.
Degree Code	Enter the degree code(s) for which the transcript is to run, enter % for all degree codes, or enter a NULL value to bypass the degree code restrictions, so that degrees are not even considered.
Degree Status	Enter the degree status(es) to which the transcript is to be restricted. Enter % to select all degree statuses, or enter a NULL value if there are no restrictions
Degree Graduation Date	Enter the date after which the student must have graduated to receive a transcript.

Г

4. Continue entering parameter values.

Parameter	Value
College	Enter the college code(s) for the transcript, or enter % or a NULL value to select all the colleges.
Major	Enter the major code(s) selected for the transcript, or enter % or a NULL value to select all the majors.
Transcript Type	Enter the type of transcript requested. If null, all transcript types are selected for processing. Enter % or a null value to select a transcript displaying all data that may be printed on the Transcript Type Rules Form (SHATPRT).
Billing Term	Enter the term during which the student's transcript fee is to be billed. If no term is entered, no transcript fee will be processed.
Billing Code	Enter the detail code associated with the transcript fee for which the student is to be billed. If no code is entered, no charge is made.
Billing Description	Enter a free-format description associated with the transcript fee.
Billing Amount	Enter the amount the student is to be billed for the transcript.
Issued to Institution Code	This parameter is required for EDI use. Enter the institution code for the institution where the transcript will be sent.
Send Electronic	This parameter is used if it is possible to send a transcript via EDI. Enter <i>Y</i> to send the transcript electronically
Issued to Name	Enter the name of the person or department to whom the transcript was issued. When running through the Host, if a NULL value is entered, the system will proceed to the In-Progress Term parameter.
Issued Street 1	Enter the first line of the street address of the person or department to whom the transcript was issued.
Issued Street 2	Enter the second line of the street address of the person or department to whom the transcript was issued.

Parameter	Value
Issued Street 3	Enter the third line of the street address of the person or department to whom the transcript was issued.
Issued City	Enter the city of the issued address.
Issued State	Enter the state of the issued address.
Issued Zip	Enter the ZIP code for the issued address.
Issued Country	Enter the country code for the country of the issued address.
In-progress Term	Enter the cutoff term for future registration.
Application Code	Enter the code that identifies the general area for which the selection identifier was defined.
Selection ID	Enter the code that identifies the population with which you wish to work. The selection identifier must have been defined on the Population Selection Definition Rules Form (GLRSLCT).
Creator ID	Enter the user ID of the person who created the population rules.
User ID	Enter the user ID for the population selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID.

- 5. Click the **Save Parameter Set as** checkbox, if you wish to save the parameters for future use.
- 6. Enter a name and description in the **Name** and **Description** fields.
- 7. Click the **Submit** radio button.
- 8. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file.

- 10. Access the Academic Transcript Process (SHRTRTC).
- 11. Enter the *DATABASE* in the **Printer** field.
- 12. Enter the parameter values, using the table that follows as a guide.

Note:	Consult yo	our instructor	to determine	the specific	values t	that should	be
entere	d for the p	urposes of th	is exercise.				

Parameter	Value
Transcript Population File	Enter <i>Y</i> if the population for which the transcript(s) are to be printed has previously been selected via the Transcript Population Process (SHRTPOP).
ID and Seq as XXXXXXXXX000	Enter % or a NULL value to select all IDs and sequences. To select a specific ID, enter the nine character ID number (XXXXXXXX) for the student. Enter the three character sequence number (000) after the ID to select a specific transcript request. Multiple IDs may be entered. The sequence number is derived from the <b>Request</b> (Number) field on the Transcript Request Form (SHARQTC). When multiple requests exist for a transcript, you may select the specific one you want by entering that sequence number after the student's ID
Transcript Type	Enter the type of transcript(s) requested. Enter % or a NULL value to select all transcript types.
Transcript Printer	If a specific printer is requested, only those students requested via that printer will be printed. Enter % or a NULL value to select all printers.
Address Selection Date	Enter the date (format DD-MON-YYYY) for which you wish to retrieve an active address record of the student for whom the transcript is being printed.
Address Priority and Type	Enter the priority number and address type code (format 1MA) for the address selection.
Official Transcript Request	Enter <i>Y</i> if the transcript request is official, <i>N</i> or a NULL value if the request is considered unofficial.
Campus Selection Indicator	Enter <i>Y</i> if only the courses associated with the campus selected are to be printed. An <i>N</i> will include all course campus codes on the transcript.

13. Continue entering parameter values.

Parameter	Value
Campus Selected	(Required if Campus Selection Indicator is set to Y) Enter the course campus code representing the campus of the courses which are to be included on the transcript.
Control Report	Enter <i>Y</i> to generate a control report, <i>N</i> or a NULL value to suppress printing of the control report.
Page Alignment	Enter <i>Y</i> to generate one page of alignment, <i>N</i> or a NULL value to suppress alignment.
Run in sleep/wake mode (Y/N)	Enter <i>Y</i> to begin the sleep/wake cycling for this process and printer.
Sleep interval	Enter the time (in seconds) this process is to pause before resuming execution.
Substitute In Progress Title	Enter the value that you would prefer to print on the transcript if the default title "IN PROGRESS WORK" is not desirable. A title of up to 30 alpha numeric characters may be entered.
Sort Order	Enter the number that corresponds with the sort order for the transcript:
	1. College
	14. Dept.
	15. Major
	16. College, Dept., Major
	17. Name
	18. Degree, Major.
Process rqsts awaiting grades?	Use this parameter to process requests that learners want held until end of term grades are rolled to academic history. Enter <i>Y</i> to process requests waiting for end of term grades. Enter <i>N</i> to process requests that are not waiting for end of term grades.
Process rqsts awaiting degrees	Use this parameter to process requests that learners want held until their degrees are posted to SHADEGR. Enter <i>Y</i> to process requests waiting for degrees to be posted. Enter <i>N</i> to process requests that are not waiting for degrees to be posted.

19. Continue entering parameter values.

Parameter	Value
Web Self Service Options	Use this parameter to process requests that learners submitted via Student Self-Service with Web self service options selected.
Web Payment Options	Use this parameter to process requests that learners submitted via Student Self-Service with Web payment options selected. The default is null.
Print Expanded Hours Formats	Enter <i>Y</i> to print the credit and/or points and GPA in the expanded format or <i>N</i> to not print using the expanded formats.

- 20. Make a note of the file name and number.
- 21. Access the Saved Output Review Form (GJIREVO).
- 22. Enter SHRTRTC in the Process field.
- 23. Enter the file number in the **Number** field or select it from the LOV.
- 24. Perform a **Next Block** function to view the file output.
- 25. Click the **Exit** icon.

## Introduction

This feature allows you to transfer transcript data electronically from one institution to another, using XML formatted files with PESC standards. XML transcripts can be sent as well as received.

This gives you a choice to print paper transcripts, use electronic transcript exchange through EDI.Smart, use self-service transcripts online, or use the electronic XML functionality. Producing XML transcripts uses the Postsecondary Electronic Standards Council (PESC) XML Postsecondary Transcript standards.

Using XML transcript processing is similar to EDI transcript processing. You need to set up supporting validation and rules, set up translation values on SOAXREF, and then you can either send a transcript by creating a transcript request or receive a transcript using sleep/wake or batch processing.

The PESC/XML Export Document Status Form (SHIEPTD) is an inquiry form that can be used to track the status of XML transcripts *sent* by the institution. You can verify whether or not the transcript was sent, as well as review additional detail about the transcript. The records are sorted by request number in descending order.

D: <mark>422139202</mark> ▼R.	ankins, Philana L.		Request N	lumber:	
equest Number	Issued To	Send Date	Send Status	Document ID	

Follow these steps to use this form.

- 1. Access the PESC/XML Export Document Status Form (SHIEPTD).
- 2. Enter the ID number of the student requesting the XML transcript in the **ID** field.
- 3. Enter the XML transcript request number for the student in the **Request Number** field.
- 4. Perform a **Next Block** function.
- 5. View the information, using the table that follows as a guide to the fields.

Field	Description
Issued To	Name of the institution to which the XML transcript is being sent
Send Date	Date the XML transcript was sent
Send Status	Status of the document ID response file from the receiving institution
Document ID	Document identification number associated with a transcript that has been sent to an institution

The PESC/XML Import Document Status Form (SHIIPTD) is an inquiry form that can be used to track the status of XML transcripts *received* by the institution. The records are sorted by institution in descending order by received date.

🙀 PESC/XML Import Docum	nent Status SHIIPTD 8	10 (BAN8) 2000			 00000000000000 <u>≤</u> ×
Source/Background Ins	titution:				
Institution D	ocument ID	Received Date	Received Status Pro	Coessed Date	Â

Follow these steps to use the form.

- 1. Access the PESC/XML Import Document Status Form (SHIIPTD).
- 2. Enter the Source/background institution code for the institution receiving/importing the XML transcript in **the Source/Background Institution** field.
- 3. Perform a Next Block function.
- 4. View the information, using the table that follows as a guide to the fields.

Field	Description
Institution	Source/background institution code for the institution that sent/exported the transcript
Document ID	Document identification number associated with a transcript that has been sent to an institution
Received Date	Date the XML transcript file was received
Received Status	Status of the XML transcript file
Processed Date	Date the XML transcript file was processed

#### **Banner process**

The PESC/XML Transcript Export Process (SHRPESE) is a Java process used to create electronic transcripts in XML format by producing an .xml file that can be read by the receiving institution. It also produces .lis and .log file entries. It uses the file transfer protocol information on SOASBGA to send the transcript to an institution.

To use this process, a transcript must have been requested through SHARQTC or SHRTPOP (using population selection). SHRPESE reads the requests from the collector file and generates the XML for the transcripts along with control and log file entries.

Note: Only official transcript requests with a send type of P will be processed. Transcripts may be produced for an individual with a pending request or for all requests which have been sent to the collector file.

	Special Print:	Lines: 55 Submit Time:
'aramete lumber	er Values Parameters T	Values 💌
01 T	Franscript Population File?	N
02 I	ID and Seq No as XXXXXXXX000	%
03 T	Franscript Type	OFFI
04 A	Address Selection Date	15-MAR-2007
05 A	Address Priority and Type	1MA
06	Campus Selection Indicator	N
07 0	Campus Selected	
08	GPA Format	R
ENGTH: 1 T nter (Y) if t	TYPE: Character O/R: Required M/S: Single transcript(s) population was previously selected via SHRTPOP	

Follow these steps to run the process.

- 1. Access the PESC/XML Transcript Export Process (SHRPESE).
- 2. Enter *DATABASE* in the **Printer** field.
- 3. Enter the parameter values, using the table as a guide to the parameters.

Parameter	Value
Transcript Population File?	Enter <i>Y</i> if the transcript population was previously selected using SHRTPOP or <i>N</i> if no transcript population file exists.
ID and Seq No as XXXXXXXX000	Enter the ID number as the first nine characters (XXXXXXXX) and the sequence number as the last three characters (000). Enter % or leave the parameter value blank to select all IDs and sequence numbers.
Transcript Type	Enter the transcript type. Multiple values are allowed.
Address Selection Date	Enter the date used to select the appropriate address.
Address Priority and Type	Enter the address priority followed by the address type, such as 1MA for a first priority mailing address.
Campus Selection Identifier	Enter $Y$ to select a campus or $N$ to not select a campus.
Campus Selected	If you entered Y in the Campus Selection Identifier parameter, enter the campus code for the campus to be processed.
GPA Format	Select the GPA format for the transcript. Enter $R$ for the rounded GPA format or $T$ for the truncated GPA format.
Run in Sleep/Wake Mod	Enter $Y$ to run the process in sleep/wake mode or $N$ to not use this option.

Parameter	Value
Sleep/Wake Interval	Enter the time in seconds for the sleep/wake interval. Valid values are <i>0</i> - <i>99999</i> .
XML Document Process Code	Enter <i>TEST</i> to run the process in audit mode or <i>PRODUCTION</i> to run the process in update mode.
Self Reported Test Source	Enter the value for self-reported test scores.
Domestic Address Nation Code	Enter the nation code for the domestic address.
Email Type Hierarchy	Enter the email type to be used (such as 1CAMP for first priority campus email) if no preferred email address exists.

- 4. Perform a **Next Block** function.
- 5. Click the **Save Parameter Set as** checkbox, if you wish to save the parameters for future use.
- 6. Enter a name and description in the **Name** and **Description** fields.
- 7. Click the **Submit** radio button.
- 8. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file.

#### **Banner process**

The PESC/XML Transcript Import Process (SHRPESI) is a Java process used to import XML transcript files into an institution from other institutions. It reads files from a server, loads them to a temporary table, renames the files (.old), and then loads the data to Banner using rules set up on STVDSTS.

Process Process	Submission Controls GJAPCTL 8.0 (BAN8) 2022/2022/2022/2022/2022/2022/2022/202	personale and a set of the set o
Printe Printer:	r Control : Special Print:	Lines: 55 Submit Time:
Param Number	neter Values r Parameters T	Values V
01	Run in Sleep/Wake Mode	
02	Sleep/Wake Interval XML File Directory	60 /u01/ban7/jobsub/xml
LENGTH (Y,N)	: 1 TYPE: Character O/R: Required M/S: Single	
Submi	ission Parameter Set as Name: Description:	☐ OHold ● Submit

Follow these steps to run the process.

- 1. Access the PESC/XML Transcript Export Process (SHRPESE).
- 2. Enter *DATABASE* in the **Printer** field.
- 3. Enter the parameter values, using the table as a guide to the parameters.

Parameter	Value
Run in Sleep/Wake Mode	Enter $Y$ to run the process in sleep/wake mode or $N$ to not use this option.
Sleep/Wake Interval	Enter the time in seconds for the sleep/wake interval.
XML File Directory	Enter the name of the absolute directory from which the XML files are pulled.
	The \$DATA_HOME directory is used if no value is entered.

- 4. Perform a **Next Block** function.
- 5. Click the **Save Parameter Set as** checkbox, if you wish to save the parameters for future use.
- 6. Enter a name and description in the Name and Description fields.
- 7. Click the **Submit** radio button.
- 8. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file.

# **Entering and Maintaining Degree Information**

### Introduction

The Degrees and Other Formal Awards Form (SHADEGR) is used to display degrees being sought or awarded to the student.

## **Banner form**

Degree and Other Formal Awards SHADEGR 8.0 (BAN8) 33333333333     ID: 422139202 Rankins, Philana L.     Learner Outcome Curricula Dual Degree Honors Institution	Degree Sequence: <ul> <li>Graduation Holds:</li> <li>Override Hold:</li> <li>View Current/Active Curricula</li> <li>anal Courses</li> <li>Transfer Courses</li> <li>Non-Course Work</li> <li>Course Attributes</li> </ul>
Outcome Status: <ul> <li>Student Record Term:</li> <li>W</li> <li>Bulletin Academic Year:</li> <li>W</li> <li>Degree Completion Term:</li> <li>W</li> <li>Graduation Application Date:</li> <li>O4-APR-2008</li> <li>Calculate GPA</li> <li>Apply to Graduate:</li> <li>W</li> <li>W<th>Graduation Information Graduation Term:  Graduation Year:  Graduation Status:  Graduation Status:  Graduation Date:  Graduation Date:  Fee:  Charge Fee Waive Fee  None  Fee Charged  Fee Amount:  Fee Date:  Fee Waived  No Fee No Fee</th></li></ul>	Graduation Information Graduation Term:  Graduation Year:  Graduation Status:  Graduation Status:  Graduation Date:  Graduation Date:  Fee:  Charge Fee Waive Fee  None  Fee Charged  Fee Amount:  Fee Date:  Fee Waived  No Fee No Fee
Curricula Summary PriorityTerm Program Catalog Level	Campus College Degree
Field of Study Summary       Priority Term       Type       Field of Study	Department Attached to Major 🗐

Follow these steps to complete the process.

- 1. Access the Degrees and Other Formal Awards Form (SHADEGR).
- 2. Enter the student's ID in the **ID** field.
- 3. Select the degree sequence number in the **Degree Sequence** field.
- 4. Select the **View Current/Active Curricula checkbox** if you want only current and active curriculum records to be displayed in the Curriculum and Field of Study blocks.
- 5. Perform a **Next Block** function.
- 6. Select the degree status code in the **Outcome Status** field.
- 7. Select the code of the term associated with the general student record in the **Student Record Term** field.
- 8. Select the year of the catalog under which the degree is being offered in the **Bulletin Academic Year** field.
- 9. Select the code of the term in which the degree is expected to be completed in the **Degree Completion Term** field.
- 10. Click the **Save** icon.

Enter information in the remaining fields in this window and in the following windows as directed by your instructor.

Note: You can select these windows from the **Options** menu or directly by using the tabs.

- Curricula
- Dual Degree
- Honors
- Institutional Courses
- Transfer Courses
- Non-Course Work
- Course Attributes

- 11. Click the Save icon.
- 12. Click the **Exit** icon.

## **Purpose**

The Diploma Information Form (SHADIPL) is used to create and maintain diploma information. The student/attendee must have a degree record on the Degrees and Other Formal Awards Form (SHADEGR) before a diploma record can be created. You may navigate to the Degrees and Other Formal Award Form (SHADEGR) via the **Options** Menu. Upon returning to the Diploma Information section of SHADIPL the program and term from SHADEGR will default into those fields.

You can update the ceremony attendance information for the student by accessing Ceremony Attendance Detail (SHACATT) from the **Options** Menu.

Use the Diploma Form to enter the ceremony that the student planned to attend and the diploma name.

SHADIPL is also where you would enter a duplicate diploma charge (under diploma charges); you would then use the Student Payment Form (TSASPAY) to post the payment for the charge.
# **Banner form**

aDiploma SHADIPL 8.0 (BAN8_WIN) 000000000000000000000000000000000000	$\times$
ID: 210009208 V Ranson, Rose Degree Sequence: V Program: Catalog Term:	Level: Degree: Holds exist View Holds: Voverride Holds:
Diploma Information	
Diploma Name: Awarding Institution: Ceremony:	Term:
Diploma Charges	
Fee Indicator: Fee Detail Code: Apply Charge to Term:	Amount: Charge Date: Fee Charged:
Diploma Address and Order Dates	
🗖 . Address Exists 🛛 📳	
Order Date: Mailed Date: 🗐	Pickup Date: 🔲 🕮 Duplicate: 🗌

#### **Steps**

Follow these steps to create and update diploma information.

- 1. Access the Diploma Form (SHADIPL).
- 2. Enter the degree sequence number in the **Degree Sequence** field by clicking the down arrow to access the Degree Summary Form (SHADGMQ). Double click the appropriate sequence number to select it and return to SHADIPL.

Degree Su ID: 2100 Term:	mmary SH4 109208 💌 F	ADGMQ 8.0 Ranson, Rose <b>Progra</b>	(BAN8_WII e im:	N) 2000000		Level: Field of Stu	dy Type:	Cooperation	College:	Degree:	>>>>> ▼
Learner Number	Outcome Status	e Summa Learner Record Term 199220	Bulletin Year 1995	Outcome Completion Term	Dual Degree	Graduation Term 199520	Graduation Status WG	Graduation Date 13-MAY-1995	Diplo	ma Name	
Curricu Priority	la Summ Term 199220	ıary - Priı Program	mary C	atalog Le <sup>.</sup> 99220 Un	<b>vel</b> dergradu	c ate	ampus	<b>Col</b> Col	lege lege of Arts & Scien	Degree Bachelor of Arts	
Field o Priority	f Study S Term 199220	Ummary Type MAJOR		Field of St Anthropold	udy Igy		Departi	ment	Attac	ched to Major 🗐	

3. Press the **Tab** key.

Note: The information posted on the Degree and Other Formal Awards Form (SHADEGR) will default to SHADIPL once the degree sequence number is entered.

- 4. Click on the **Next Block** icon to access the Diploma Information Block. Use this block to enter the name the graduate would like printed on the diploma.
- 5. Enter the student's name as it should appear on the diploma in the **Diploma Name** field.

Note: The Diploma name defaults in from the Legal Name. If no Legal Name is specified, then the default is from the Current Name. (Both of these fields are on the General Person Identification form (SPAIDEN)). If you enter a change in the Diploma name, it will NOT affect the fields on SPAIDEN.

6. Enter the awarding institution name in the Awarding Institution field. Click the

down arrow to access the list of values (LOV) from the Graduation Institution Name Validation Form (STVINNM).

Note: The Awarding Institution field information is supplied by the Graduation Default Control Form (SHAGRDD) and may be overridden here. This is an optional field.

 Enter the ceremony at which the student will be receiving a diploma in the Ceremony field. Click the down arrow and select <u>Valid Ceremonies</u> to access the Ceremony Query Form (SHACRMQ).

Note: This field is also used to track the return of the cap and gown when the diploma is presented. This field is not required; however, if a value is entered, a check is performed to ensure that the student/attendee has registered for that ceremony and term. The **Ceremony** field may be accessed from any field in the Diploma Information section via the performance of a **Duplicate Item** function. The value for the field will default in if it exists.

Ÿ.	Ceremony	Query S	SHACRMQ	8.0 (E	AN8_\	WIN)	20000			 				 						-000
	Term	Cei	remony		Descri	iption	1	First E	vent	Date		Т	ime	Buildin	ıg	Ro	oom		Site	
			•											•	_			_	•	1
	200810	BUS	N				_		_		_			BWV	-			-	001	1
	200010													0011						
																				j

8. Press the F8 key to execute a query.

Result: All valid ceremonies will be listed. You can also enter data into one or more of the fields before executing your query to limit the results.

- 9. Double click on the appropriate ceremony to pull it back to SHADIPL.
- 10. If a diploma fee is to be charged, complete the **Term** field.

Note: When fee processing is requested (Fee Indicator is set to Y), the graduation term defaults into the **Term** field, if available. The defaulted term can be changed to another valid term code but will be a required field in order to charge a diploma fee. The **Term** field is not required; however, if a value is entered, a check is performed to ensure that the student/attendee has registered for that ceremony and term. The **Term** field may be accessed from any field in the Diploma Information section via the performance of a **Duplicate Item** function. The value for the field will default in if it exists.

11. Click on the **Next Block** icon to access the Diploma Charges block. You will use this block if fees are being charged for diplomas or if a fee is being charged for a

replacement diploma.

- 12. Check the Fee Indicator checkbox to request fee processing.
- 13. Enter a detail code for the fee in the **Fee Detail Code** field by clicking the down arrow to access the Detail Code Control Form –Student (TSADETC). Double-click a value from this form to select it and return to SHADIPL.
- 14. Enter the appropriate term in the **Apply Charge to Term** field. Click the down arrow to select a term from the list of values (LOV) from the Term Code Validation Form (STVTERM).
- 15. Enter the amount of the fee in the **Amount** field.
- 16. Enter the date of the charge in the **Charge Date** field.
- 17. Click the **Save** icon.

Result: The transaction will disappear, but the **Fee Charged** indicator will have a 'Y' in it to indicate a fee has been charged.

- 18. Navigate to the Diploma Address and Order Dates block. The Diploma Address and Order Dates block is used to track the dates the diploma was ordered, mailed or picked up. It is also used to track ordering, mailing and pick-up information for duplicate diplomas. The address where the diploma was mailed is also tracked in this block.
- 19. To enter the address where the diploma should be mailed click on the **Update Address** icon. This will access the Address Information block.
- 20. Enter an address type to use one of the student's existing addresses or enter a freeform address.
- 21. Click the **Save** icon and click the **Return** button.
- 22. Enter the date the diploma was ordered in the **Order Date** field.

Note: The (Diploma) **Pickup Date** field is optional and may be updated when the cap and gown are exchanged or returned. The (Diploma) **Pickup Date** field may also be updated via the Mass Update Ceremony Attendance Form (SHAMUCA). The student/attendee may be associated with a ceremony via the Ceremony Attendance Form (SHACATT), or else the fields must be left blank.

#### **Purpose**

The Ceremony Attendance Form (SHACATT) is used to create and maintain ceremony attendance records. A record will exist for each unique ceremony that the student will attend. Information is maintained on this form such as cap, gown, hood, types and sizes. When the Cap Type, Gown Type and Hood Type are entered, the associated information will default in to the Attendee Information section from the Attendee Size Classification Rules Form (SHASIZE) when these rules have been created.

The Attendee Size Classification Rules Form (SHASIZE) is an optional table of sizes and ranges that is used by SHACATT. If an asterisk (\*) is displayed in one of the measurement fields for height, weight, or cap size, it indicates that the measurement entered does not fall within a predetermined range on SHASIZE. This does not prevent the user from entering information or overtyping the data in the sections for height, weight, head size and cap, gown and hood type.

Use this form if a student plans to walk in the graduation ceremony (for purposes of count), for cap and gown (to share with the bookstore), etc.

#### **Banner form**

ID: <mark>21000920</mark> Ceremony: MAIN	SHACATT 8.0 (BANS_WIN) Showshowshowshowshowshowshowshowshowshows	Term:	🗆 Holds Exist	View Holds 💌 🛛 Ove	erride Holds: 🗌
Attendee Informa	tion				
Height: Weight: Head Size:	Unit of Measure: Unit of Measure: Unit of Measure:			Activity Date	
Attendee Sizes					
Cap Type:	Gown Type:	<b>•</b>		Hood Type:	
Size:	Size:				
Dates					
Order: Pickup: Return:	III     Order:       III     Pickup:       III     Return:			Order: Pickup: Return:	

#### **Steps**

Follow these steps to create ceremony attendance records.

- 1. Access the Ceremony Attendance Form (SHACATT).
- 2. Search for and enter the student's ID in the **ID** field.
- 3. Enter the type of ceremony in the **Ceremony** field.
- 4. Enter the appropriate term in the **Term** field.
- 5. Perform a **Next Block** function to access the Attendee Information block. You will use this block to enter height, weight, and head size information for the attendee.
- 6. Enter a numerical value for the attendee's height in the Height field.

Note: Similarly, you will enter numerical values for weight and head size and corresponding units of measure in the appropriate fields.

7. Enter the appropriate unit of measure for the height in the **Unit of Measure** field.

Note: You can enter the height in inches, feet, or other appropriate unit of measure. For each **Unit of Measure** field, you can click the corresponding down arrow to

access the list of values (LOV) from the Measurement Validation Form (STVMEAS).

- 8. Enter the attendee's weight in the **Weight** field and enter the unit of measure in the **Unit of Measure** field, for example, *pounds*.
- 9. Enter the attendee's head size in the **Head Size** field and the appropriate unit of measure in the **Unit of Measure** field.
- 10. Perform a **Next Block** function to access the Attendee Sizes block. You will use this block to enter cap, gown, and hood size information for the attendee.
- 11. Enter the appropriate type in the **Cap Type** field by clicking the down arrow to select one from the list of values (LOV) from the Type Validation Form (STVTYPE).
- 12. Enter the attendee's cap size in the **Size** field by clicking the down arrow to select one from the list of values (LOV) from the Size Validation Form (STVSIZE).
- 13. Enter the gown type in the **Gown Type** field by clicking the down arrow to select one from the list of values (LOV) from the Type Validation Form (STVTYPE).
- 14. Enter the attendee's gown size in the **Size** field by clicking the down arrow to select one from the list of values (LOV) from the Size Validation Form (STVSIZE).
- 15. Enter the hood type in the **Hood Type** field, if appropriate, by clicking the down arrow to select one from the list of values (LOV) from the Type Validation Form (STVTYPE).

Note: Note that order dates have defaulted in for each item. When appropriate, you can enter the date the attendee picked up each item in the corresponding **Pickup** field, and enter the date each item was returned in the corresponding **Return** field.

- 16. Click the **Save** icon.
- 17. Use the **Options** menu to access the Additional Ceremony Information block. You will use this block to enter ceremony information for fees, tickets, and non-student institutions.

Note: The Account Detail Review Form (TSAAREV) may be accessed from the **Options** menu, where charges on the student's account may be reviewed. If a fee has been charged to the student's account, the **Fee Charged** box will be checked.

18. Enter the appropriate value in the **Fee Indicator** field.

Enter a Y if a fee is being charge or a W (Waiver) to waive the fee. If you leave this field blank, no fee processing will occur.

19. Enter the detail code in the **Fee** field, if appropriate. Click the down arrow to select a detail code from the Detail Code Control Form – Student (TSADETC).

- 20. Enter the amount of the fee in the **Amount** field.
- 21. Enter the number of announcements the attendee has requested in the **Announcements** field.
- 22. Enter the number of tickets the attendee has requested in the Tickets field.
- 23. Enter the date tickets were ordered by the attendee in the Order Date field.

Note: When appropriate, you can enter the date the attendee picked up the tickets in the corresponding **Pickup Date** field, or enter the date the tickets were mailed in the **Mail Date** field.

- 24. Click the **Non-Student** checkbox only if the attendee is not a student. Otherwise, leave this checkbox unchecked.
- 25. For a non-student who will be attending the ceremony from another institution, enter the appropriate institution code in the **Institution** field by clicking the down arrow to access the list of values (LOV) from the Source/Background Institution Validation Form (STVSBGI).
- 26. Perform a **Next Block** function to access the Attendee Comment block.
- 27. Enter any comments related to the attendee in the Ceremony Comments field.
- 28. Click the Save icon.
- 29. Click the Exit icon.

# Commencement Report

#### **Purpose**

The Commencement Report (SHRCOMM) lists all of the graduation records that satisfy the search criteria, and optionally prints to the designated printer or saves the report for later review. All parameters are optional on this report.

# **Banner form**

Process Process	Submission Controls GJAPCTL 8.0 (BAN8_WIN) 202020202020	Parameter Set:				
Printe Printer:	r Control : <u>NOPRINT</u> Special Print:	Lines: 55 Submit Time:				
Param Number	neter Values r Parameters T	Values 💌				
01	Degree Status Code Selection	%				
02	Grad Begin Range (YYYYMM)	000000				
03	Grad End Range (YYYYMM)	999999				
04	Graduation Term Code Selection	%				
05	Graduation Year Selection	%				
06	Graduation Status Code	%				
07	Print Graduation Holds					
LENGTH: Degree : Submi	ENGTH: 2 TYPE: Character O/R: Optional M/S: Multiple Degree status code used for selection (% for all).					

# **Steps**

Follow these steps to produce the Commencement Report:

- 1. Access the Commencement Report form (SHRCOMM).
- 2. Perform a **Next Block** function to move to the Printer Control Block.
- 3. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

- 4. Perform a **Next Block** function to move to the Parameter Values Block.
- 5. Enter the degree status code in the Degree Status Code Selection field.

Note: This value is selected from the Degree Status Code Validation Form (STVDEGS). If % is entered, all degree status codes are selected.

6. Enter the begin date for the date range for which the report is to be generated into the **Grad Begin Range** field, using the YYMM format.

Note: The default value is 0000.

7. Enter the end date for the date range for which the report is to be generated into the **Grad End Range** field, using the YYMM format.

Note: The default value is 9999.

8. Enter the graduation term code which represents the population for which the report is to be generated in the **Graduation Term Code Selection** field.

Note: This value is selected from the Term Code Validation form (STVTERM). Multiple values may be entered. If % is entered, all terms are used.

9. Enter the graduation year for which the report is to be generated in the **Graduation Year Selection** field.

Note: This value is selected from the Academic Year Validation form (STVACYR).

10. Enter the graduation status code that represents the population for which the report is to be generated into the **Graduation Status Code** field.

Note: This value is selected from the Graduation Status Validation form (STVGRTS). Multiple values may be entered, or % for all values.

11. Enter *Y* into the **Print Graduation Holds** field to print students with active

graduation holds.

- 12. Perform a **Next Block** function to move to the Submission Block.
- 13. Click the **Save Parameter Set as** checkbox, if you wish to save the parameters for future use. If you do not check this box, skip the next step.
- 14. Enter a name and description for the parameter set in the **Name** and **Description** fields.
- 15. Click the **Submit** radio button. (Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.)
- 16. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file, or the Batch ID if you chose to hold the process for later submission.

- 17. Select **Review Output** on the **Options** menu to review the report.
- 18. Click the **Exit** icon to close the report.
- 19. Click the **Exit** icon.

# Sample Report:

Baved Output Review GJIREV	O 8.0 (BA	N8_WIN) 00000000	***************************************	***********	00000000000000000000000000000000000000
Number: 8309 🔽	File Nam	e: rocoram2_ban8_s	aisusr_shrcomm_8309.lis		Lines: 41
28-APR-2008 01:36:23 PM		RO	CORAM2_BAN8_Win2003		PAGE 1
		c	ommencement Report		SHRCOMM
NAME	DEGREE	MAJOR	INST HONORS	DEPT HONORS	
		<del></del>			
Clark Condens	CPR	Undeclared			
Clark, Candace	CPR	Undeclared			
Crucible Frences	TD	low	aure Louido		
Davis Donald	CPP	Low Underlared	cum Taude		
George Ginger	JD	Lew			
Klein. Melissa	CPR	Undeclared			
Morris, May	BSN	Nursing	cum laude		
Morris, May	CPR	Undeclared			
Nicely, Nicholas	BSN	Nursing	cum laude		
Nixon, Bruce	DIPL	- Electronic Technol	одХ		
Owens, Oliver	BBA	Accounting			
Peters, Janice	CPR	Undeclared			
Piper, Pamela	BBA	Accounting	cum laude		
					D.

#### Purpose

The Commencement Attendance Report (SHRCATT) displays the ceremony information and lists those persons who are attending the ceremony. You may request that the report also display the information on caps, gowns, and hoods, which may be used by institutions to place their orders.

This report can show students, non-students or all; Print the cap and gown detail; Print the cap, gown, and hood order totals; List only those who have no cap, gown or hood information; List only those who have not picked up their order; List only those who have not returned their order.

### **Banner form**

g Process ( Process	Submission Controls GJAPCTL 8.0 (BAN8_WIN) 222222222222222222222222222222222222	Parameter Set:
Printer Printer:	r Control           NOPRINT           Special Print:	Lines: 55 Submit Time:
Param Number	neter Values Parameters V	¥alues 💌
01	Ceremony Type	%
02	Term	%
03	Students, Non-students or all?	
04	Print cap/gown/hood detail?	
05	Print cap/gown order totals?	
06	List all with no cap/gown info	
07	List all with no pickup date?	
08	List all with no return date?	
LENGTH: Ceremor	10 TYPE: Character O/R: Required M/S: Multiple ny type used for selection (% for all).	
Submis	ssion Parameter Set as Name: Description:	C Hold • Submit

#### **Steps**

Follow these steps to produce the Commencement Attendance Report.

- 1. Access the Commencement Attendance Report (SHRCATT).
- 2. Perform a **Next Block** function to move to the Printer Control block.
- 3. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

- 4. Perform a **Next Block** function to move to the Parameter Values Block.
- 5. Enter a value for the ceremony to be attended into the **Ceremony Type** field.

Note: The ceremony type code is validated by the Ceremony Type Validation form (STVCERT). % is entered for all ceremony types.

6. Enter the term in which the ceremony will occur into the **Term** field.

Note: The term code is validated by the Term Code Validation form (STVTERM). % is entered for all term codes.

- 7. Enter a value into the **Students**, **Non-Students**, **or All?** field, indicating which attendees to print. The only valid choices are:
  - *S* Students
  - *N* Non-students
  - Null Both
- 8. Enter a *Y* into the **Print Cap/Gown/Hood Detail?** field to print detail of cap, gown, and hood information for the attendees.
- 9. Enter a *Y* into the **Print Cap/Gown/Hood Order Totals?** field to print totals of caps, gowns, and hoods ordered by the attendees.
- 10. Enter a *Y* into the **List All With No Cap/Gown Information?** field to print only those attendees with no cap, gown, or hood information available.
- 11. Enter a *Y* into the **List All With No Pickup Date?** field to print only those attendees who have not picked up their order for cap, gown, or hood.
- 12. Enter a *Y* into the List All With No Return Date? field to print only those attendees who have not returned their cap, gown, or hood.
- 13. Perform a **Next Block** function to move to the Submission Block.

- 14. Click the **Save Parameter Set as** checkbox, if you wish to save the parameters for future use. If you do not check this box, skip the next step.
- 15. Enter a name and description for the parameter set in the **Name** and **Description** fields.
- 16. Click the **Submit** radio button. (Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.)
- 17. Click the **Save** icon to execute the report.

Result: The Auto hint line displays the job submission number for the report log and list file, or the Batch ID if you chose to hold the process for later submission.

- 18. Select **Review Output** on the **Options** menu to review the report.
- 19. Click the **Exit** icon to close the report.
- 20. Click the Exit icon.

#### **Purpose**

The Mass Entry Graduation Form (SHAMDEG) is used for mass entering of graduation data. The student must have a degree record on the Degrees and Awards Form (SHADEGR) before graduation information can be updated via the Mass Entry Graduation Form (SHAMDEG). If no update data is entered in the Update Window, then the form is used as a query form.

Note: If a fee has been entered in the Graduation Update Values section on the main window, but the student selected for the update has already been assessed a fee, no new fee will be applied via mass entry. To apply another fee, use the Degrees and Other Formal Awards Form (SHADEGR).

Updates will take place when holds exist. You can search on specific criteria, perform updates, and then view the results. If no search criteria are entered, the Results window will not display any records. You can manually enter IDs for students with degree records and perform updates from the Results window.

Population Selection can be also used to search for degree records and PIDMs that meet the search criteria of the form. Degree records are selected first, then an "intersect" is performed, and PIDMs that exist in the population selection are selected and displayed with the results. See the *Population Selection* workbook for details on creating a population selection.

### **Banner form**

Mass Entry Graduation SHAMDEG	8.0 (BAN8_WIN) 2000000000	yaanaanaanaanaanaanaanaanaanaanaanaanaan
Search Criteria Registration Term: Graduation Term: Graduation Date: Graduation Year: Graduation Status: Graduation Status: Outcome Status: Degree Completion Term: Class:		Level:Image: Campus:Campus:Image: Campus:College:Image: Campus:Degree:Image: Campus:Program:Image: Campus:Field of Study Type:Image: Campus:Department:Image: Campus:Curricula:Image: Campus:
Population Selection Application: Selection ID: Creator ID: User ID:	▼ ▼	

#### **Steps**

Follow these steps to perform mass entry of graduation data.

- 1. Access the Mass Entry Graduation Form (SHAMDEG).
- 2. Enter a registration term into the **Registration Term** field.

Note: The **Registration Term** field indicates the term in which the student will be likely to graduate. If the **Registration Term** field is left blank, and selection criteria are not defined, the system will display all students having degree records in the Degree Information window.

Result: Students who meet the requested selection criteria will appear in the Degree Information window. If no selection criteria are entered, a full table scan will result.

- 3. Enter the graduation term into the **Graduation Term** field.
- 4. Enter the graduation date into the **Graduation Date** field.
- 5. Enter the graduation year into the Graduation Year field.
- 6. Enter the graduation application status into the **Graduation Application Status** field.

- 7. Enter the degree status into the **Outcome Status** field.
- 8. Enter the degree completion term code into the **Degree Completion Term** field.
- 9. Enter the class code, based on the primary curriculum, into the Class field.
- 10. Enter the level code into the Level field.
- 11. Enter the campus code into the **Campus** field.
- 12. Enter the college code into the **College** field.
- 13. Enter the degree code into the **Degree** field.
- 14. Enter the program code into the **Program** field.
- 15. Select the Learner field of study type from the list in the **Field of Study Type** field.
- 16. Select the field of study code in the Field of Study field.
- 17. Enter the department into the **Department** field.
- 18. Enter the curriculum into the **Curricula** field.

Note: This field is required when any curriculum information is entered, and defaults to *Any*. If no other curriculum items are entered, this field is not included in the search. The choice of values for this field are: *Primary*, *Secondary*, or *Any*.

- 19. Optionally, you may use the Tab key to move to the Population Selection section of this form, and fill in Population Selection information. (See the *Population Selection* workbook for more information on population selection.) If you do not wish to enter a population selection you may skip to step 24.
- 20. Select a value for the **Application** field. This is the code that identifies the general area for which the selection identifier is defined.

Note: The Population Selection Extract Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.

21. Enter a value in the **Selection ID** field. This code identifies the population with which you wish to work.

Note: The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT)

- 22. Enter a value for the **Creator ID** field. This is the User ID of the person who created the population rules.
- 23. Enter a value for the User ID field. This is the User ID of the one who selected the

population of people.

Note: This may or may not be the same as the Creator ID.

24. Perform a **Next Block** function or click on the **Update** tab and enter the update values. Use the Tab key to navigate through the fields available to be updated.

Example: If you enter *GR* in the **Graduation Status** field, then all selected students will have their graduation status updated to *GR*.

🙀 Mass Entry Graduation	n SHAMDEG 8.0 (BAN8_WIN)	
Search Update Res	ults	
Graduation Upda Graduation Term: Graduation Status: Graduation Year: Graduation Date: Outcome Status:	te Values	Fee:  None Charge Fee Waive Fee Fee Code: Fee Amount: Fee Date: Fee Term Code:
Mail Submission Letter Code: Initials:	<b>•</b>	Initiated Date: Wait Days:

- 25. Enter a term code in the **Graduation Term** field.
- 26. Enter a graduation application status code in the Graduation Status field.
- 27. Enter a graduation year in the **Graduation Year** field.
- 28. Enter a graduation date in the **Graduation Date** field.
- 29. Enter a degree status in the **Outcome Status** field.
- 30. Select the appropriate radio button in the **Fee** radio group. This indicates whether fees are to be charged, not charged or waived for the update criteria.
- 31. If you selected the *Charge* Fee radio button, enter a code into the **Fee Detail Code** field. This is the code for the charged graduation fee.

Note: The **Fee** field must be set to *Charge Fee* to enter a fee code in this field. When a fee code is entered, the **Fee Amount**, **Fee Date** and **Fee Term Code** must also be entered.

- 32. If you did not select the *Charge Fee* radio button, skip to step 36.
- 33. Enter the amount into the Fee Amount field.
- 34. Enter the date the graduation fee was assessed into the **Fee Date** field.

Note: This field defaults to the system date, but can be changed.

- 35. Enter a term code into the **Fee Term Code** field.
- 36. Use the Tab key to navigate to the Mail Submission section of the **Update** tab (See the *Letter Generation* Workbook for more information.) If you do not wish to generate any mail from this Update, you may skip to step 42.
- 37. Enter a code into the Letter Code field.
- 38. Enter a date into the **Initiated Date** field.
- 39. Enter a date into the **Printed Date** field.
- 40. Enter the initials of the person signing the letter into the Initials field.
- 41. Enter the number of days to wait before printing the letter into the Wait Days field.
- 42. Perform a **Next Block** function to view students meeting the selection criteria entered in the **Results** tab. This is also the window where you submit the results for immediate update processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).

The students listed on the **Results** tab allow you to view and update the results of the search and/or add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review results messages on this window.

Note: Use the **Options** menu to access Degree and Awards Detail (SHADEGR), Degree Summary (SHADGMQ), Review Account Detail (TSAAREV) and Student Holds (SOQHOLD). You can also use Remember ID from the **Options** menu to view a specific ID.

Mass Entry Gradu. earch Update	ation SHAMDEG 8.0 (BANB_WIN) 202002 Results		00000				0000					××× .
Results Select Indicator: Select ID	: Oselect All Obselect All ® None Name	Sequence Number	Hold	Deceased	r Conf	4anuall Added	<b>y</b> Yes	No	Partial	None	Message	
							0 0 0	0 0 0	0	• [		
							0 0 0	0 0 0	0 0 0	• [ • [ • [		
							0	0	0	• [ • [ • [		
							0	0	0 0 0	• [ • [		
Submission	□ Hold for Job Submission	Batch Process II										

43. Review the list of students that has been produced as a result of entering the Search Criteria and Population Selection as described above. You can also review the results of the Update on this window, based on the fields as described:

Field	Description
Select Indicator	Radio group used to select all, deselect all or take no action for the IDs returned by the search.
	<ul> <li>Select All: the Select checkbox is automatically checked for all records.</li> </ul>
	<ul> <li>Deselect All: the Select checkbox is automatically unchecked for all records.</li> </ul>
	• After either is chosen, the radio group defaults to None.
Select	Checkbox used to indicate that the individual ID has been manually selected for processing. This field must be checked for updates to occur.
ID	ID of the student to be processed. Use SOAIDEN or GUIALTI to manually add an ID.
Name	Name of the student to be processed

Field	Description
Sequence Number	Sequence number of the degree record from SHADEGR to be updated. This results from the entered search criteria.
Hold	Checkbox used to indicate whether graduation hold(s) exist. This field is informational only and will not prevent updates from taking place.
Deceased	Checkbox used to indicate whether the student is deceased. This field is informational only and will not prevent processing from taking place.
Conf	Checkbox used to indicate whether the student's information is confidential. This field is informational only and will not prevent processing from taking place.
Manually Added	Checkbox used to indicate whether the ID was added manually on the form. This field is informational only and will not prevent processing from taking place. This box is automatically checked when a record is manually added.
Update Status (radio group)	This Radio Group indicates whether changes for the record were successfully saved and the parent form was updated, were not successfully saved and the parent form was not updated, were partially saved and the parent form was partially updated, or that no processing of updates occurred for the record.
	Values are:
	• Yes
	• No • Partial
	None
Message	Displays results related text for successful, partially successful, or unsuccessful updates. Use the <b>Edit</b> button to open the Edit window and view the full text.

- 44. Use the Tab key to navigate to the Submission Block on this window. This block is used to submit the information for immediate mass entry processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).
- 45. Note the check boxes **Submit** and **Hold for Submission**. One or the other should

be selected to indicate whether processing should occur immediately or be held for batch processing later.

Note: Only one of these checkboxes can be selected. The default is the **Submit** checkbox.

- 46. If the **Hold for Job Submission** checkbox is selected, note the system generated Batch ID for the process you have created in the **Batch Process ID** field.
- 47. Select the **Submit** checkbox.
- 48. Click the **Save** icon.

Note: Note the results window is updated. Write down the ID number of one of the updated students.

- 49. Click the **Exit** icon.
- 50. Access the Degrees and Other Formal Awards Form (SHADEGR), and use the Student ID that you noted to verify that the record has been updated.

#### Purpose

The Mass Entry Ceremony Attendance Form (SHAMCAT) is used to perform mass entry of ceremony attendance data. Ceremony information is inserted for students with degree records (SHADEGR) who do not have existing ceremony records (SHACATT) for the ceremony and ceremony term in the Ceremony Update Values.

If a fee has been entered in the Ceremony Update Values, but the student selected for the update has already been assessed a fee, no new fee will be applied via mass entry. To apply another fee, use the Degrees and Awards Form (SHADEGR).

Updates take place even if holds exist. You can search on specific criteria, perform updates, and then view the results. If no search criteria are entered, the Results window will not display any records. You can manually enter IDs for students with degree records and perform updates from the Results window.

Population selection can be also used to search for degree and PIDMs that meet the search criteria of the form. Degree records are selected first, then an "intersect" is performed, and PIDMs that exist in the population selection are selected and displayed with the results. See the *Population Selection* workbook for details on creating a population selection.

#### **Banner form**

earch Update Results Search Criteria	
Graduation Term: Outcome Status: Class: Select Graduation Application Attend Ceremony: No Undecided No Response Any	Level:Image:Campus:Image:College:Image:Degree:Image:Program:Image:Field of Study Type:Image:Field of Study Code:Image:Department:Image:Curricula:Image:
Population Selection Application: Selection ID: Creator ID: User ID:	

#### **Steps**

Follow these steps to enter Search criteria for the mass entry of Ceremony Attendance information.

- 1. Access the Mass Entry Ceremony Attendance Form (SHAMCATT).
- 2. Use the **Search** tab to enter the search criteria for mass ceremony attendance processing. Use the search criteria and/or the population selection to perform the search.
- 3. Enter the graduation term code into the **Graduation Term** field.
- 4. Enter the degree status code into the **Outcome Status** field.
- 5. Enter the class code based on the primary curriculum into the **Class** field.
- 6. If a graduation application (SHAGAPP) must exist for this student, click on the **Select Graduation Application** checkbox.
- 7. Note the radio group **Attend Ceremony**. The setting here is determined by the data from the graduation application on SHAGAPP. This radio group indicates whether the student will attend the graduation ceremony.

Note: Valid values are Yes, No, Undecided, No Response, Any .

- 8. Enter the level code into the **Level** field.
- 9. Enter the campus code into the **Campus** field.
- 10. Enter the college code into the **College** field.
- 11. Enter the degree code into the **Degree** field.
- 12. Enter the program code into the **Program** field.
- 13. Select the Learner field of study type from the list in the **Field of Study Type** field.
- 14. Select the field of study code in the Field of Study field.
- 15. Enter the department into the **Department** field.
- 16. Enter the curriculum into the **Curricula** field.

Note: This field is required when any curriculum information is entered, and defaults to *Any*. If no other curriculum items are entered, this field is not included in the search. The choice of values for this field are: *Primary*, *Secondary*, or *Any*.

- 17. Optionally, you may use the Tab key to move to the Population Selection section of this form, and fill in Population Selection information. (See the *Population Selection* workbook for more information on population selection.) If you do not wish to enter a population selection you may skip to step 22.
- 18. Select a value for the **Application** field. This is the code that identifies the general area for which the selection identifier is defined.

Note: The Population Selection Extract Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.

19. Enter a value in the **Selection ID** field. This code identifies the population with which you wish to work.

Note: The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT)

- 20. Enter a value for the **Creator ID** field. This is the User ID of the person who created the population rules.
- 21. Enter a value for the **User ID** field. This is the User ID of the one who selected the population of people.

Note: This may or may not be the same as the Creator ID.

22. Perform a **Next Block** function or click on the **Update** tab and enter the update values. Use the Tab key to navigate through the fields available to be updated. Use this section to add update values for ceremony attendance records based on the search criteria entered in the **Search** tab. You must enter a valid ceremony and ceremony term in the update criteria before you can perform any updates.

Mass Entry Ceremony Attendance SHAMCAT 8.0 (BAN8_WIN) Search Update Results Ceremony Update Values	Second and a second a s second a second a s Second a second a s Second a second a s
Ceremony: Ceremony Term:	Fee: ● None O Charge Fee O Waive Fee Fee Detail Code: Fee Amount: Fee Date: Fee Term: ▼
Mail Submission Letter Code: 💽 💌 Initials: 🔍 🔍	Initiated Date: Print Date: IIII Wait Days:

- 23. Enter a graduation ceremony code into the Ceremony field.
- 24. Enter a term code into the **Ceremony Term** field.
- 25. Select the appropriate radio button in the **Fee** radio group. This indicates whether fees are to be charged, not charged or waived for the update criteria.
- 26. If you selected the *Charge* Fee radio button, enter a code into the **Fee Detail Code** field. This is the code for the charged graduation fee.

Note: The **Fee** field must be set to *Charge Fee* to enter a fee code in this field. When a fee code is entered, the **Fee Amount**, **Fee Date** and **Fee Term Code** must also be entered.

- 27. If you did not select the *Charge Fee* radio button, skip to step 31.
- 28. Enter the amount into the Fee Amount field.
- 29. Enter the date the graduation fee was assessed into the Fee Date field.

Note: This field defaults to the system date, but can be changed.

- 30. Enter a term code into the **Fee Term Code** field.
- 31. Use the Tab key to navigate to the Mail Submission section of the Update tab (See the Letter Generation Workbook for more information.) If you do not wish to generate any mail from this Update, you may skip to step 37.
- 32. Enter a code into the Letter Code field.
- 33. Enter a date into the **Initiated Date** field.
- 34. Enter a date into the **Printed Date** field.
- 35. Enter the initials of the person signing the letter into the Initials field.
- 36. Enter the number of days to wait before printing the letter into the Wait Days field.
- 37. Perform a **Next Block** function to view students meeting the selection criteria entered in the **Results** tab. This is also the window where you submit the results for immediate update processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).
- 38. The students listed on the **Results** tab allow you to view and update the results of the search and/or add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review results messages on this window.

Note: Use the **Options** menu to access Degree and Awards Detail (SHADEGR), Degree Summary (SHADGMQ), Review Account Detail (TSAAREV), Student Holds (SOQHOLD), Ceremony Attendance Detail (SHACATT), View Ceremony Information (SHACRMQ), View Ceremony Attendance (SHACATQ), View Ceremonies by Attendee (SHACPRQ) and Diploma Information (SHADIPL). You can also use Remember ID from the **Options** menu to view a specific ID.

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Select	ID •	Name	Term Code	Sequence Number	Hold	Deceased	l Conf	4anual Added	l <b>y</b> IYes	No	Partia	l None	Message	
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39. Review the list of students that has been produced as a result of entering the Search Criteria and Population Selection as described above. The **Results** tab is used to view the mass entry results and then submit the results for immediate update processing, or hold them for later processing through job submission using the Process Mass Entry Report (SORMEBP). You can also add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review result messages.

Note: Use the **Options** menu to access Degree and Awards Detail (SHADEGR), Degree Summary (SHADGMQ), Review Account Detail (TSAAREV), Student Holds (SOQHOLD), Ceremony Attendance Detail (SHACATT), View Ceremony Information (SHACRMQ), View Ceremony Attendance (SHACATQ), View Ceremonies by Attendee (SHACPRQ) and Diploma Information (SHADIPL). You can also use Remember ID from the **Options** menu to view a specific ID.

Field	Description
Select Indicator	Radio group used to select all, deselect all or take no action for the IDs returned by the search.
	• Select All: the Select checkbox is automatically checked for all records.
	<ul> <li>Deselect All: the Select checkbox is automatically unchecked for all records.</li> </ul>
	• After either is chosen, the radio group defaults to <i>None</i> .
Select	Checkbox used to indicate that the individual ID has been manually selected for processing. This field must be checked for updates to occur.
ID	ID of the student to be processed. Use SOAIDEN or GUIALTI to manually add an ID.
Name	Name of the student to be processed
Sequence Number	Sequence number of the degree record from SHADEGR to be updated. This results from the entered search criteria.
Hold	Checkbox used to indicate whether graduation hold(s) exist. This field is informational only and will not prevent updates from taking place.
Deceased	Checkbox used to indicate whether the student is deceased. This field is informational only and will not prevent processing from taking place.
Conf	Checkbox used to indicate whether the student's information is confidential. This field is informational only and will not prevent processing from taking place.
Manually Added	Checkbox used to indicate whether the ID was added manually on the form. This field is informational only and will not prevent processing from taking place. This box is automatically checked when a record is manually added.

Field	Description
Update Status (radio group)	This Radio Group indicates whether changes for the record were successfully saved and the parent form was updated, were not successfully saved and the parent form was not updated, were partially saved and the parent form was partially updated, or that no processing of updates occurred for the record.
	Values are:
	• Yes
	• No
	• Partial
	None
Message	Displays results related text for successful, partially successful, or unsuccessful updates. Use the <b>Edit</b> button to open the Edit window and view the full text.

- 40. Use the Tab key to navigate to the Submission Block on this window. This block is used to submit the information for immediate mass entry processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).
- 41. Note the check boxes **Submit** and **Hold for Submission**. One or the other should be selected to indicate whether processing should occur immediately or be held for batch processing later.

Note: Only one of these checkboxes can be selected. The default is the **Submit** checkbox.

- 42. If the **Hold for Job Submission** checkbox is selected, note the system generated Batch ID for the process you have created in the **Batch Process ID** field.
- 43. Select the **Submit** checkbox.
- 44. Click the **Save** icon.

Note: Note the results window is updated. Write down the ID number of one of the updated students.

- 45. Click the **Exit** icon.
- 46. Access the Ceremony Attendance Form (SHACATT), and use the Student ID that you noted to verify that the record has been updated.

#### **Purpose**

The Mass Entry Diploma Form (SHAMDIP) is used to perform mass entry of diploma information for students with degree records (SHADEGR) that do not have existing diploma records (SHADIPL) associated with the degree records.

If a fee has been entered in the Diploma Update Values, but the student selected for the update has already been assessed a fee, no new fee will be applied via mass entry. To apply another fee, use the Degrees and Awards Form (SHADEGR).

Updates will take place when holds exist. You can search on specific criteria, perform updates, and then view the results. If no search criteria are entered, the **Results** tab will not display any records. You can manually enter IDs for students with degree records and perform updates from the **Results** tab.

Population selection can be also used to search for degree and PIDMs that meet the search criteria of the form. Degree records are selected first, then an "intersect" is performed, and the PIDMs that exist in the population selection are selected and displayed with the results. See the *Population Selection* Workbook for more details.

### **Banner form**

aMass Entry Diploma SHAMDIP 8.0 (BAN8_WIN) Search Update Result	************************************
Search Criteria Graduation Term:  Uterel:  Campus:  College:  Degree:  Program:	Field of Study Type: Field of Study Code: Department: Curricula: Class:
Population Selection Application: Selection ID: Creator ID: User ID:	▼ ▼ ■

# **Steps**

Use these steps to perform mass entry of diploma information for students.

- 1. Access the Mass Entry Diploma Form (SHAMDIP).
- 2. Use the Search Criteria section of the **Search** tab to enter the criteria to select students for whom you wish to create diploma information records. Use the search criteria and/or the population selection to perform the search.
- 3. Enter the graduation term code into the **Graduation Term** field.

Note: This is the term in which the student will potentially graduate. If this field is left blank, and search criteria are not defined, the system will display all students having diploma records in the Results window.

- 4. Enter the degree status code into the **Outcome Status** field.
- 5. Enter the level code into the **Level** field.
- 6. Enter the campus code into the **Campus** field.
- 7. Enter the college code into the **College** field.

- 8. Enter the degree code into the **Degree** field.
- 9. Enter the program code into the **Program** field.
- 10. Select the Learner field of study type from the list in the Field of Study Type field.
- 11. Select the field of study code in the **Field of Study** field.
- 12. Enter the department into the **Department** field.
- 13. Enter the curriculum into the **Curricula** field.

Note: This field is required when any curriculum information is entered, and defaults to *Any*. If no other curriculum items are entered, this field is not included in the search. The choice of values for this field are: *Primary*, *Secondary*, or *Any*.

- 14. Enter a class code based on the primary curriculum into the **Class** field.
- 15. Optionally, you may use the Tab key to move to the Population Selection section of this form, and fill in Population Selection information. (See the *Population Selection* workbook for more information on population selection.) If you do not wish to enter a population selection you may skip to step 20.
- 16. Select a value for the **Application** field. This is the code that identifies the general area for which the selection identifier is defined.

Note: The Population Selection Extract Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.

17. Enter a value in the **Selection ID** field. This code identifies the population with which you wish to work.

Note: The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT)

- 18. Enter a value for the **Creator ID** field. This is the User ID of the person who created the population rules.
- 19. Enter a value for the **User ID** field. This is the User ID of the one who selected the population of people.

Note: This may or may not be the same as the Creator ID.

20. Perform a **Next Block** function or click on the **Update** tab and enter the update values. Use the Tab key to navigate through the fields available to be updated. Use this section to add update values for diploma records based on the search criteria entered in the Search window.

a Mass Entry Diploma SHAMDIP 8.0 (BAN8_WIN) 2000 Search Update Result Diploma Update Values	
✓ Create Diploma Record      Awarding Institution:     ✓     Address Type:     ✓     Ceremony:     ✓     Ceremony Term:     ✓     Diploma Order Date:      Create Ceremony Attendance	Fee:  None Charge Fee Waive Fee Fee Detail Code: Fee Amount: Fee Date: Fee Term Code:
Mail Submission Letter Code: Initials:	Initiated Date: Print Date: Wait Days:

21. Click on the **Create Diploma Record** to indicate whether diplomas should be created.

Note: The default setting for this checkbox is checked. Data is not inserted when this field is unchecked.

- 22. Enter the name of the awarding institution to be printed on the diploma in the **Awarding Institution** field.
- 23. Enter an address type code into the **Address Type** field.

Note: This is the diploma mailing address type.

- 24. Enter a graduation ceremony code into the **Ceremony** field.
- 25. Enter a term code into the **Ceremony Term** field.
- 26. Enter the date the diploma was ordered into the **Diploma Order Date** field.
- 27. Click on the Create Ceremony Attendance checkbox

Note: This checkbox used to indicate whether ceremony attendance records should be created (SHACATT) so that ceremony data can be added to the diploma record. The ceremony and ceremony term will not be updated on the diploma record unless a SHACATT record exists for the same ceremony and ceremony term.

28. Select the appropriate radio button in the Fee radio group. This indicates whether

fees are to be charged, not charged or waived for the update criteria.

29. If you selected the *Charge* Fee radio button, enter a code into the **Fee Detail Code** field. This is the code for the charged graduation fee.

Note: The **Fee** field must be set to *Charge Fee* to enter a fee code in this field. When a fee code is entered, the **Fee Amount**, **Fee Date** and **Fee Term Code** must also be entered.

- 30. If you did not select the *Charge Fee* radio button, skip to step 36.
- 31. Enter the amount into the Fee Amount field.
- 32. Enter the date the graduation fee was assessed into the Fee Date field.

Note: This field defaults to the system date, but can be changed.

- 33. Enter a term code into the Fee Term Code field.
- 34. Use the Tab key to navigate to the Mail Submission section of the **Update** tab (See the *Letter Generation* Workbook for more information.) If you do not wish to generate any mail from this Update, you may skip to step 40.
- 35. Enter a code into the Letter Code field.
- 36. Enter a date into the **Initiated Date** field.
- 37. Enter a date into the **Printed Date** field.
- 38. Enter the initials of the person signing the letter into the Initials field.
- 39. Enter the number of days to wait before printing the letter into the Wait Days field.
- 40. Perform a **Next Block** function to view students meeting the selection criteria entered in the **Results** tab. This is also the window where you submit the results for immediate update processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).

The students listed on the **Results** tab allow you to view and update the results of the search and/or add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review results messages on this window.
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lect Indicator:	Select All ODeselect All	™ None Se N	equence Jumber Hol	d Decease	N d Conf	1anuall Added	y Yes N	lo Partia	l None	Message
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41. Review the list of students that has been produced as a result of entering the Search Criteria and Population Selection as described above. The **Results** tab is used to view the mass entry results and then submit the results for immediate update processing, or hold them for later processing through job submission using the Process Mass Entry Report (SORMEBP). You can also add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review result messages.

Note: Use the **Options** menu to access Degree and Awards Detail (SHADEGR), Degree Summary (SHADGMQ), Review Account Detail (TSAAREV), Student Holds (SOQHOLD), Ceremony Attendance Detail (SHACATT), View Ceremonies by Attendee (SHACPRQ) and Diploma Information (SHADIPL). You can also use Remember ID from the **Options** menu to view a specific ID.

Field	Description

Field	Description
Select Indicator	Radio group used to select all, deselect all or take no action for the IDs returned by the search.
	• <i>Select All</i> : the <b>Select</b> checkbox is automatically checked for all records.
	<ul> <li>Deselect All: the Select checkbox is automatically unchecked for all records.</li> </ul>
	• After either is chosen, the radio group defaults to None.
Select	Checkbox used to indicate that the individual ID has been manually selected for processing. This field must be checked for updates to occur.
ID	ID of the student to be processed. Use SOAIDEN or GUIALTI to manually add an ID.
Name	Name of the student to be processed
Sequence Number	Sequence number of the degree record from SHADEGR to be updated. This results from the entered search criteria.
Hold	Checkbox used to indicate whether graduation hold(s) exist. This field is informational only and will not prevent updates from taking place.
Deceased	Checkbox used to indicate whether the student is deceased. This field is informational only and will not prevent processing from taking place.
Conf	Checkbox used to indicate whether the student's information is confidential. This field is informational only and will not prevent processing from taking place.
Manually Added	Checkbox used to indicate whether the ID was added manually on the form. This field is informational only and will not prevent processing from taking place. This box is automatically checked when a record is manually added.

Field	Description
Update Status (radio group)	This Radio Group indicates whether changes for the record were successfully saved and the parent form was updated, were not successfully saved and the parent form was not updated, were partially saved and the parent form was partially updated, or that no processing of updates occurred for the record.
	Values are:
	• Yes
	• No
	• Partial
	• None
Message	Displays results related text for successful, partially successful, or unsuccessful updates. Use the <b>Edit</b> button to open the Edit window and view the full text.

- 42. Use the Tab key to navigate to the Submission Block on this window. This block is used to submit the information for immediate mass entry processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).
- 43. Note the check boxes **Submit** and **Hold for Submission**. One or the other should be selected to indicate whether processing should occur immediately or be held for batch processing later.

Note: Only one of these checkboxes can be selected. The default is the **Submit** checkbox.

- 44. If the **Hold for Job Submission** checkbox is selected, note the system generated Batch ID for the process you have created in the **Batch Process ID** field.
- 45. Select the **Submit** checkbox.
- 46. Click the **Save** icon.

Note: Note the results window is updated. Write down the ID number of one of the updated students.

47. Click the **Exit** icon.

48. Access the Diploma Information Form (SHADIPL), and use the Student ID that you noted to verify that the record has been updated.

#### Purpose

The Mass Update Diploma Form (SHAMUDI) is used to perform mass updating of diploma records for students with degree records (SHADEGR) and existing diploma records (SHADIPL).

Updates will take place when holds exist. You can search on specific criteria, perform updates, and then view the results. If no search criteria are entered, the **Results** tab will not display any records. You can manually enter IDs for students with diploma records and perform updates from the Results window.

Population selection can be also used to search for diploma records and PIDMs that meet the search criteria of the form. Diploma records are selected first, then an "intersect" is performed, and PIDMs that exist in the population selection are selected and displayed with the results.

Mass Update Diploma SHAMUDI 8.0 (BAN8_WIN) 2000000000000000000000000000000000000	
Search Criteria	
Outcome Status:	Level: Campus: College: Degree: Program: Field of Study Type: Field of Study Code: Department: Curricula: V
Population Selection    Application:    Selection ID:    Creator ID:    User ID:	

# **Banner form**

## **Steps**

Use these steps to perform mass entry of diploma information for students.

- 1. Access the Mass Update Diploma Form (SHAMUDI).
- 2. Use the Search Criteria section of the **Search** tab to enter the criteria to select students for whom you wish to update diploma information records. Use the search criteria and/or the population selection to perform the search.
- 3. Enter the graduation term code into the **Graduation Term** field.

Note: This is the term in which the student will potentially graduate. If this field is left blank, and search criteria are not defined, the system will display all students having diploma records in the Results window.

- 4. Enter the degree status code into the **Outcome Status** field.
- 5. Enter the level code into the **Level** field.
- 6. Enter the campus code into the **Campus** field.
- 7. Enter the college code into the **College** field.
- 8. Enter the degree code into the **Degree** field.
- 9. Enter the program code into the **Program** field.
- 10. Select the Learner field of study type from the list in the **Field of Study Type** field.
- 11. Select the field of study code in the Field of Study field.
- 12. Enter the department into the **Department** field.
- 13. Enter the curriculum into the **Curricula** field.

Note: This field is required when any curriculum information is entered, and defaults to *Any*. If no other curriculum items are entered, this field is not included in the search. The choice of values for this field are: *Primary*, *Secondary*, or *Any*.

- 14. Enter a class code based on the primary curriculum into the **Class** field.
- 15. Optionally, you may use the Tab key to move to the Population Selection section of this form, and fill in Population Selection information. (See the *Population Selection* workbook for more information on population selection.) If you do not wish to enter a population selection you may skip to step 20.
- 16. Select a value for the **Application** field. This is the code that identifies the general area for which the selection identifier is defined.

Note: The Population Selection Extract Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.

17. Enter a value in the **Selection ID** field. This code identifies the population with which you wish to work.

Note: The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT)

- 18. Enter a value for the **Creator ID** field. This is the User ID of the person who created the population rules.
- 19. Enter a value for the **User ID** field. This is the User ID of the one who selected the population of people.

Note: This may or may not be the same as the Creator ID.

20. Perform a **Next Block** function or click on the **Update** tab and enter the update values. Use the Tab key to navigate through the fields available to be updated. Use this section to add update values for diploma records based on the search criteria entered in the Search window.

e Mass Update Diploma SHAMUDI 8.0 (BAN8_WIN) 2000200200 Search Update Results	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Diploma Update Values	Diploma Insert Values Create Ceremony Attendance:
Awarding Institution:	Create Ceremony Attendance:
Mail Submission Letter Code:	Initiated Date: Print Date: IIII Wait Days:

- 21. Enter the name of the awarding institution to be printed on the diploma in the **Awarding Institution** field.
- 22. Enter the graduation ceremony code into the Ceremony field.

- 23. Enter the term code for the ceremony into the Ceremony Term field.
- 24. Enter the date the diploma was ordered into the **Diploma Order Date** field.
- 25. Enter the date the diploma is to be mailed into the **Diploma Mail Date** field.
- 26. Enter the date the diploma is to be picked up into the **Diploma Pickup Date** field.
- 27. Click on the **Create Ceremony Attendance** checkbox. This checkbox is used to indicate whether ceremony attendance records should be created (SHACATT) so that ceremony data can be added to the diploma record. The ceremony and ceremony term will not be updated on the diploma record unless a SHACATT record exists for the same ceremony and ceremony term.
- 28. Use the Tab key to navigate to the Mail Submission section of the Update tab. (See the *Letter Generation* Workbook for more information.) If you do not wish to generate any mail from this Update, you may skip to step 34.
- 29. Enter a code into the Letter Code field.
- 30. Enter a date into the **Initiated Date** field.
- 31. Enter a date into the **Printed Date** field.
- 32. Enter the initials of the person signing the letter into the Initials field.
- 33. Enter the number of days to wait before printing the letter into the Wait Days field.
- 34. Perform a **Next Block** function to view students meeting the selection criteria entered in the **Results** tab. This is also the window where you submit the results for immediate update processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).

The students listed on the **Results** tab allow you to view and update the results of the search and/or add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review results messages on this window.

Note: Use the **Options** menu to access Degree and Awards Detail (SHADEGR), Degree Summary (SHADGMQ), Review Account Detail (TSAAREV), Student Holds (SOQHOLD), Ceremony Information (SHACRMY), Ceremony Attendance Detail (SHACATT), View Ceremonies by Attendee (SHACPRQ) and Diploma Information (SHADIPL). You can also use Remember ID from the **Options** menu to view a specific ID.

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35. Review the list of students that has been produced as a result of entering the Search Criteria and Population Selection as described above. The **Results** tab is used to view the mass entry results and then submit the results for immediate update processing, or hold them for later processing through job submission using the Process Mass Entry Report (SORMEBP). You can also add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review result messages.

Note: Use the **Options** menu to access Degree and Awards Detail (SHADEGR), Degree Summary (SHADGMQ), Review Account Detail (TSAAREV), Student Holds (SOQHOLD), Ceremony Attendance Detail (SHACATT), Ceremony Information (SHACRMY), View Ceremonies by Attendee (SHACPRQ) and Diploma Information (SHADIPL). You can also use Remember ID from the **Options** menu to view a specific ID.

Field	Description
Select Indicator	Radio group used to select all, deselect all or take no action for the IDs returned by the search.
	<ul> <li>Select All: the Select checkbox is automatically checked for all records.</li> </ul>
	<ul> <li>Deselect All: the Select checkbox is automatically unchecked for all records.</li> </ul>
	• After either is chosen, the radio group defaults to <i>None</i> .
Select	Checkbox used to indicate that the individual ID has been manually selected for processing. This field must be checked for updates to occur.
ID	ID of the student to be processed. Use SOAIDEN or GUIALTI to manually add an ID.
Name	Name of the student to be processed
Sequence Number	Sequence number of the degree record from SHADEGR to be updated. This results from the entered search criteria.
Hold	Checkbox used to indicate whether graduation hold(s) exist. This field is informational only and will not prevent updates from taking place.
Deceased	Checkbox used to indicate whether the student is deceased. This field is informational only and will not prevent processing from taking place.
Conf	Checkbox used to indicate whether the student's information is confidential. This field is informational only and will not prevent processing from taking place.
Manually Added	Checkbox used to indicate whether the ID was added manually on the form. This field is informational only and will not prevent processing from taking place. This box is automatically checked when a record is manually added.

Field	Description
Update Status (radio group)	This Radio Group indicates whether changes for the record were successfully saved and the parent form was updated, were not successfully saved and the parent form was not updated, were partially saved and the parent form was partially updated, or that no processing of updates occurred for the record.
	Values are:
	• Yes
	• No
	• Partial
	None
Message	Displays results related text for successful, partially successful, or unsuccessful updates. Use the <b>Edit</b> button to open the Edit window and view the full text.

- 36. Use the Tab key to navigate to the Submission Block on this window. This block is used to submit the information for immediate mass entry processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).
- 37. Note the check boxes **Submit** and **Hold for Submission**. One or the other should be selected to indicate whether processing should occur immediately or be held for batch processing later.

Note: Only one of these checkboxes can be selected. The default is the **Submit** checkbox.

- 38. If the **Hold for Job Submission** checkbox is selected, note the system generated Batch ID for the process you have created in the **Batch Process ID** field.
- 39. Select the **Submit** checkbox.
- 40. Click the **Save** icon.

Note: Note the **Results** tab is updated. Write down the ID number of one of the updated students.

- 41. Click the **Exit** icon.
- 42. Access the Diploma Information Form (SHADIPL), and use the Student ID that you noted to verify that the record has been updated.

#### Purpose

The Mass Update Ceremony Attendance Form (SHAMUCA) is used to perform mass update of ceremony attendance records for students with existing ceremony records (SHACATT).

Updates will take place when holds exist. You can search on specific criteria, perform updates, and then view the results. If no search criteria are entered, the **Results** tab will not display any records. You can manually enter IDs for students with ceremony records and perform updates from the **Results** tab.

Population selection can be also used to search for ceremony records and PIDMs that meet the search criteria of the form. Ceremony records are selected first, then an "intersect" is performed, and PIDMs that exist in the population selection are selected and displayed with the results.

Mass Update Cerem earch Update Re	ony Attendance SHAMUCA 8.0 (BAN8_WIN) 000000000000000000000000000000000000
Search Criteria	
Ceremony Term: Ceremony:	
Population Sele	ection
Application: Selection ID: Creator ID:	

# **Banner form**

#### **Steps**

Follow these steps to enter Search criteria for the mass entry of Ceremony Attendance information.

- 1. Access the Mass Entry Ceremony Attendance Form (SHAMCATT).
- 2. Use the **Search** tab to enter the search criteria for mass ceremony attendance processing. Use the search criteria and/or the population selection to perform the search.
- 3. Enter the term code for the ceremony into the Ceremony Term field.
- 4. Enter the code for the graduation ceremony for the search criteria into the **Ceremony** field.
- 5. Optionally, you may use the Tab key to move to the Population Selection section of this form, and fill in Population Selection information. (See the *Population Selection* workbook for more information on population selection.) If you do not wish to enter a population selection you may skip to step 10.
- 6. Select a value for the **Application** field. This is the code that identifies the general area for which the selection identifier is defined.

Note: The Population Selection Extract Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.

7. Enter a value in the **Selection ID** field. This code identifies the population with which you wish to work.

Note: The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT)

- 8. Enter a value for the **Creator ID** field. This is the User ID of the person who created the population rules.
- 9. Enter a value for the **User ID** field. This is the User ID of the one who selected the population of people.

Note: This may or may not be the same as the Creator ID.

10. Perform a **Next Block** function or click on the **Update** tab and enter the update values. Use the Tab key to navigate through the fields available to be updated. Use this section to add update values for ceremony attendance records based on the search criteria entered in the Search window. You must enter a valid ceremony and ceremony term in the update criteria before you can perform any updates.

Mass Update Ceremony Attendance SHAMUG Search Update Results Ceremony Update Values	CA 8.0 (B/	AN8_WIN)			0000000000	 000000000	
Cap Type:  Gown Type:  Hood Type:  Number of Tickets:	Type:       ▼       Cap Size:       ▼         vn Type:       ▼       Gown Size:       ▼         id Type:       ▼       Ticket Mail Date:       ■         nber of Tickets:       Ticket Mail Date:       ■         Cap Gown Hood Ticket       ■       ■         ler Date:       ■       ■						
Order Date: III Pickup Date: IIII Return Date: IIII Diploma Pickup Date: IIII	Cap  -  -	Gown	Hood  -  -	Ticket			
Mail Submission Letter Code: V Initials: V				Initia	ted Date:	 Print Date: Wait Days:	

- 11. Enter the graduation cap type into the **Cap Type** field.
- 12. Enter the graduation cap size into the Cap Size field.
- 13. Enter the graduation gown type into the **Gown Type** field.
- 14. Enter the graduation gown size into the **Gown Size** field.
- 15. Enter the academic hood type into the **Hood Type** field.
- 16. Enter the number of tickets ordered into the Number of Tickets field.
- 17. Enter the date tickets are to be mailed in the **Ticket Mail Date** field.

Note: This field is optional when the **Order Date** field and **Ticket** checkbox are used.

18. Enter the date the cap, gown, hood and/or tickets are ordered by the students into the **Order Date** field. Use the associated checkboxes to select the ordered items.

Note: Once an order date has been entered, you can then check the indicators for **Cap**, **Gown**, **Hood**, and/or **Ticket**.

- 19. Click on the **Cap** checkbox to indicate that a cap has been ordered.
- 20. Click on the **Gown** checkbox to indicate that a gown has been ordered.

- 21. Click on the **Hood** checkbox to indicate that an academic hood has been ordered.
- 22. Click on the **Ticket** checkbox to indicate that tickets have been ordered.
- 23. Enter the Date the cap, gown, hood and/or tickets will be picked up by the student into the **Pickup Date** field. Use the associated checkboxes to select the items to be picked up.
- 24. Note: Once a pickup date has been entered, you can check the indicators for **Cap**, **Gown**, **Hood**, and/or **Ticket**.
- 25. Click on the **Cap** checkbox to indicate that a pickup date has been selected for the cap.
- 26. Click on the **Gown** checkbox to indicate that a pickup date has been selected for the gown.
- 27. Click on the **Hood** checkbox to indicate that a pickup date has been selected for the hood.
- 28. Click on the **Ticket** checkbox to indicate that a pickup date has been selected for the tickets.
- 29. Enter the date the cap, gown and/or hood will be returned by the student into the **Return Date** field. Use the associated checkboxes to select the items to be returned.
- 30. Note: Once a return date has been entered, you can then check the indicators for **Cap, Gown** and/or **Hood**.
- 31. Click on the **Cap** checkbox to indicate that a return date has been selected for the cap.
- 32. Click on the **Gown** checkbox to indicate that a return date has been selected for the gown.
- 33. Click on the **Hood** checkbox to indicate that a return date has been selected for the hood.
- 34. Enter the Date diploma will be picked up by the student into the **Diploma Pickup Date** field. This data updates the SHADIPL record if it exists.
- 35. Use the Tab key to navigate to the Mail Submission section of the **Update** tab. (See the *Letter Generation* Workbook for more information.) If you do not wish to generate any mail from this Update, you may skip to step 40.
- 36. Enter a code into the Letter Code field.
- 37. Enter a date into the **Initiated Date** field.

- 38. Enter a date into the **Printed Date** field.
- 39. Enter the initials of the person signing the letter into the Initials field.
- 40. Enter the number of days to wait before printing the letter into the Wait Days field.
- 41. Perform a **Next Block** function to view students meeting the selection criteria entered in the **Results** tab. This is also the window where you submit the results for immediate update processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).

The students listed on the **Results** tab allow you to view and update the results of the search and/or add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review results messages on this window.

Note: Use the **Options** menu to access Degree and Awards Detail (SHADEGR), Degree Summary (SHADGMQ), Review Account Detail (TSAAREV), Student Holds (SOQHOLD), Ceremony Attendance Detail (SHACATT), View Ceremony Attendance (SHACATQ), View Ceremonies by Attendee (SHACPRQ) and Diploma Information (SHADIPL). You can also use Remember ID from the **Options** menu to view a specific ID.

Results	6	_	_											
elect Ii Select	ndicator: ID ▼	○ Select All ○ Dese Name	elect All ® None Ceremo Term Co T	ny de Ceremony T	Hold	Decease	N I Conf	1anual Added	ly Yes	No I	Partial	None	Message	
								•	9	0	9	۰		
									0	0	0	• [		
									0	$\circ$	0	• [		
									$\circ$	0	0	• [		
									$\circ$	$\circ$	0	• [		]:
									0	$\circ$	0	• [		]:
									0	0	0	• [		1:
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									$\circ$	$\circ$	0	• [		]
									0	0	0	• [		1
									0	0	0	• [		٦.,

42. Review the list of students that has been produced as a result of entering the Search Criteria and Population Selection as described above. The **Results** tab is used to view the mass entry results and then submit the results for immediate update processing, or hold them for later processing through job submission using the Process Mass Entry Report (SORMEBP). You can also add individual IDs for processing. You can select and deselect IDs for processing and query on various fields for individual records. You can also review result messages.

Note: Use the **Options** menu to access Degree and Awards Detail (SHADEGR), Degree Summary (SHADGMQ), Review Account Detail (TSAAREV), Student Holds (SOQHOLD), Ceremony Attendance Detail (SHACATT), View Ceremony Attendance (SHACATQ), View Ceremonies by Attendee (SHACPRQ) and Diploma Information (SHADIPL). You can also use Remember ID from the **Options** menu to view a specific ID.

Field	Description
Select Indicator	Radio group used to select all, deselect all or take no action for the IDs returned by the search.
	<ul> <li>Select All: the Select checkbox is automatically checked for all records.</li> </ul>
	<ul> <li>Deselect All: the Select checkbox is automatically unchecked for all records.</li> </ul>
	After either is chosen, the radio group defaults to None.
Select	Checkbox used to indicate that the individual ID has been manually selected for processing. This field must be checked for updates to occur.
ID	ID of the student to be processed. Use SOAIDEN or GUIALTI to manually add an ID.
Name	Name of the student to be processed
Sequence Number	Sequence number of the degree record from SHADEGR to be updated. This results from the entered search criteria.
Hold	Checkbox used to indicate whether graduation hold(s) exist. This field is informational only and will not prevent updates from taking place.

Field	Description
Deceased	Checkbox used to indicate whether the student is deceased. This field is informational only and will not prevent processing from taking place.
Conf	Checkbox used to indicate whether the student's information is confidential. This field is informational only and will not prevent processing from taking place.
Manually Added	Checkbox used to indicate whether the ID was added manually on the form. This field is informational only and will not prevent processing from taking place. This box is automatically checked when a record is manually added.
Update Status (radio group)	This Radio Group indicates whether changes for the record were successfully saved and the parent form was updated, were not successfully saved and the parent form was not updated, were partially saved and the parent form was partially updated, or that no processing of updates occurred for the record.
	Values are:
	• Yes
	• No
	• Partial
	None
Message	Displays results related text for successful, partially successful, or unsuccessful updates. Use the <b>Edit</b> button to open the Edit window and view the full text.

- 43. Use the Tab key to navigate to the Submission Block on this window. This block is used to submit the information for immediate mass entry processing or hold the updates for later processing through job submission using the Process Mass Entry Report (SORMEBP).
- 44. Note the check boxes **Submit** and **Hold for Submission**. One or the other should be selected to indicate whether processing should occur immediately or be held for batch processing later.

Note: Only one of these checkboxes can be selected. The default is the **Submit** checkbox.

- 45. If the **Hold for Job Submission** checkbox is selected, note the system generated Batch ID for the process you have created in the **Batch Process ID** field.
- 46. Select the **Submit** checkbox.
- 47. Click the Save icon.

Note: Note the **Results** tab is updated. Write down the ID number of one of the updated students.

- 48. Click the **Exit** icon.
- 49. Access the Ceremony Attendance Form (SHACATT), and the (SHASIZE) and use the Student ID that you noted to verify that the record has been updated.

# Mass Entry Audit

#### **Overview**

Whenever the Mass Entry process executes, an audit file is saved, capturing all of the information on the **Search/Update** tabs and the **Results** tab for each Mass Entry executed. These files can be reviewed by opening this Mass Entry Audit form (SOAMAUD). This form is used to query mass entry event information by session.

These files can be searched by date, user ID and/or form name. The list of saved files is displayed on the **Sessions** tab. You can then view the selected session's associated search criteria and updated and inserted values in the **Search/Update** tab. Depending on whether the updates have been processed directly on the mass entry form or by batch processing (SORMEBP), the processing results can be displayed in the **Results** tab with any associated result messages and whether the record was manually added.

# **Banner form**

Mass Entry Audit SOAMA	UD 8.1 (s10b80) 3033643 OCT-2008 🔟 Submit Da	te To: 03-NOV-2008 🗐	User ID: SAISUSR	👻 Form Name: 🛛 👻
Sessions Search/U	Ipdate Results			
Date Initiated	User ID Initiated	Date Completed	User ID	Batch Process ID
Form Name:				
orm Name:		LJ		U

# **Steps**

Follow these steps to review Mass Entry Audit files.

- 1. Access the Mass Entry Audit form (SOAMAUD).
- 2. Using the Key Block, enter the earliest date to search for the Audit Session by filling in the **Submit Date From** field.
- 3. Enter the latest date to search for the Audit Session by filling in the **Submit Date To** field.
- 4. Select the User ID from the drop down list.
- 5. Enter the **Form Name** to search for Audit Session files for that specific form.
- 6. Perform a **Next Block** function to see the list of Audit Session files that exist for the criteria specified.
- 7. Highlight the Audit Session file desired.
- 8. Click on the Search/Update tab.

🙀 Mass Entry Audit SC	AMAUD 8.1 (s10680) 0000000000000000000000000000000000	imes ) provide a construction of the construction of the construction of $ imes$
Submit Date From:	27-OCT-2008 Submit Date To: 03-NOV-2008	User ID: SAISUSR Form Name:
Sessions Sear	ch/Update Results	
Date Initiated	User ID Initiated Date Completed	User ID Completed Batch Process ID
	Column	Value
Search Criteria:		
	Column	Value
Update Criteria:		

9. Note the following data is contained at the top of the **Search/Update** tab:

Field	Description
Date Initiated	The date the Mass Entry was initiated
User ID Initiated	User ID of the individual who initiated the Mass Entry.
Date Completed	The date the Mass Entry update was complete; If Batch process has not yet been run this field will be empty.
User ID Completed	User ID of the individual who ran the update; If Batch process has not yet been run this field will be empty.
Batch Process ID	The Batch Process ID assigned by the system to this session, if Batch processing was selected. If the update was processed in real time, this field will be empty.
Form Name	Identifies the form used for Mass Entry
Session Name	The name of the session selected

- 10. The Search Criteria from the original Mass Entry form is reproduced in the Search Criteria block on the **Search/Update** tab.
- 11. The Update Criteria from the original Mass Entry form is reproduced in the Update Criteria block on the **Search/Update** tab.
- 12. The Mass Entry process updates the mass entry tables with result codes and associated result messages once updates have taken place. Results may be viewed on the **Results** tab, and include both records selected for update, and records that satisfied the Search criteria that were not selected for update.

mit Date From: 2 essions Search	7-OCT-2008 🗐 Submit Dat	e To: 03-NOV-2008	User ID:	SAISUS	R			Forn	n Name:	
Date Initiated	User ID Initiated	Date Completed	User ID Co	mpleted				Batch Pr	ocess ID	2
m Name: ID	Name		r Hold	Manually Added	Yes	i No	Partia	l None	Message	Process Indicato
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					0	0	0	0		

Note: The **Update** radio group in the **Results** tab show whether the updates were successful (*Yes*), partially successful (*Partial*), not successful (*No*) or that no updates were considered (*None*). The **Message** field displays related result messages for the update, such as that shown in the illustration below.

sele Sele	ults ct Indicator: ct ID	⊖Select All ⊂De Name	select All Some	Sequence Number	Hold	Deceased	t Conf	Manua Adde	lly d Ye	5 No	Partia	None	Message
-	210000002	Benson, Glaria M.	Editor Million	anna ann an a	110710		4400	<i></i>	×	0	0		No updates per
	210000001	Benson, Peter G.	Fee applied. Degree up	dated. Letter o	reated.				-6	0	0		No updates per
n	100600009	Bigelow, Lynn							6	0	0		No updates per
	A00010326	Bunte, Jacko C.							b	0	0		No updates per
	058800017	Cooper, Marc							b	0	0		No updates per
	058800017	Cooper, Marc	1						b	0	0		No updates per
	180600008	Downey, James							Eb	0	0		No updates per
	MCSINSERT	Duplicate Scott, McGill	( OK	Cancel )	Seat	th)			b	0	0		No updates per
	MCINSERT	Duplicate Icon, McGill	0.00	(action)	- Later	2				0	0		No updates per
9	A00612182	English, Melanie	12	2				2		0	51	0	d. C
í.	PUTUREODO	Puture Admit, Ellen		1				0	0	0	0		No updates per
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Sub	A00012182 PUTUR£000 3KP0028	English, Melanie Future Admit, Ellen Grantian, Ida		1				S	00	000	00		d. C No updates per No updates per

- 13. The audit tables are updated when the mass entry updates are processed in real time on a mass entry form. The tables are also updated when job submission batch processing (SORMEBP) is run for updates that have been held for later processing.
- 14. After reviewing the results of your selected session, click on the **Exit** icon.

#### **Overview**

The Process Mass Entry Report (SORMEBP) is used to process mass entry updates in batch that are held for job submission processing in the **Results** tab of the mass entry form. When a process is held for job submission, all of the data is written to the Mass Entry Audit tables without a date completed or an update result, but with a batch process identifier. The batch process ID can be submitted through job submission using SORMEBP when you are ready to process the updates.

This report processes the mass entry updates based on the mass entry form name, the ID of the user who initiated the updates, the date and time the records were saved for batch update, and the batch process ID. Only records with no completion date are considered for update. Output is listed in alphabetical order and can show summary, detail or totals information.

The report can be run in Audit or Update mode. Audit Mode permits the user to run the batch process as a "trial," and the update results and associated messages are not shown on the report output. When run in Update mode, updates are made to the parent forms of the mass entry forms, and the audit table is updated with the ID of the user who ran the report, the date completed, the results and the setting of the Process Indicator on the Audit form.

Printer Printer:	Control	Special Print:	Lines: 55 Submit Time:
	-		
aramı lumber	eter Values Parameters		Values
D1	Form Name		SGAMSTU
0.2	Add User 3D		
03	Add Date From		
04	Add Date To		
015	Batch Process ID		SYSTEST24MSTU000033
06	Report Option		D
07	Run Mode		u

# **Banner Form**

# **Steps**

Use the following steps to execute the selected Batch process report.

- 1. Access the Batch Update Process Report (SORMEBP).
- 2. Enter the Form Name into the Parameter Value block, and query to locate your Batch Process ID.
- 3. Select the Batch Process you wish to run.
- 4. Press **Next Block** to move to the Submission block.
- 5. To save the parameter set for use again in future queries you can fill in the **Name** and **Description** fields, and click on the check box for **Save Parameter Set as**.
- 6. Click on the **Save** icon.
- 7. Click on the **Exit** icon.
- 8. To confirm that the Batch process did run, access the Mass Entry Audit form (SOAMAUD), and navigate to the Audit file associated with the Batch ID you just processed. You can then review the **Results** tab to note the results of the Batch process.

# Mass Entry Purge Audit

# Introduction

-

Audit tables may be very large, and you may wish to remove them after the processing is complete and the audit confirms the results. Records can be selected for deletion based on mass entry form, user ID, from and to dates, delete option (update status to be deleted), or batch process ID. The update status can be:

- All completed updates
- Failed updates
- Incomplete updates
- No updates
- Partial updates
- Successful updates.

The process can be run in Audit Mode or Update Mode, and can show summary, detail or totals information.

# **Banner form**

rinter	Control	
Printer:	DATABASE Special Print:	Lines: 55 Submit Time:
Param Sumber	eter Values Parameters	Values
01	Form Name	SHAMDER
02	User ID	The second se
03	Add Data From	
04	Add Date To	
05	Delete Option	A
06	Run Mode	A
07	Report Option	A
0.0	Batch Process 1D	SYSTESTLEMDEG000007
ENGTH: ienerats	30 TVPE: Character O/R: Optional M/S: Single ed Batch Identifier created if update was held for Job Submissio	n.

# **Steps**

Follow these steps to purge the Audit file you created earlier.

- 1. Access the Purge Mass Entry Audit form (SOPMAUD).
- 2. Press on **Next Block** to access the parameter values.
- 3. The form name is required. In this case, enter SAAMAPP.
- 4. Enter the Batch ID, if you created one when you executed SAAMAPP. You can also enter other parameters that will further narrow the list of sessions returned to you, such as your User ID or the Add Dates.
- 5. When the selected file is displayed, you can choose to select individual records for deletion, or you can Select All for deletion. Follow your instructor's directions as to which records to delete.
- 6. Click on the **Save** icon.
- 7. Click on the **Exit** icon.

#### Let's review

As a result of completing this workbook, you have

- reviewed and created validation forms that control end of term processing, awarding and maintaining degree records, and producing transcripts
- produced class rosters
- rolled grades to academic history
- ran repeat/equivalent course processing
- calculated academic standing
- produced grade reports
- updated student types
- maintained degree records
- produced academic transcripts
- processed XML transcripts

Now you are ready to begin determining how the various processes and procedures will be implemented. Decisions will need to be made based upon your organization's needs as to which code validation forms and control and rules forms will be used as well as what your values will be on these forms.

#### **Directions**

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

#### **Question 1**

What do you use the Class Roster Form (SFASLST) for?

#### **Question 2**

How do you roll grades to academic history using the (SFASLST) form?

#### **Question 3**

What Banner forms are used to generate grade mailers?

#### **Question 4**

What is the first process that must be run if you want to generate grade mailers?

#### **Question 5**

Can you generate grade mailers for only a group of students?

#### **Question 6**

What Banner form do you use to maintain students' degree information?

#### **Question 7**

What is the Transcript Request Form (SHARQTC) used for?

# **Question 8**

What process must be run for generating either single or multiple transcripts?

# **Question 1**

What do you use the Class Roster Form (SFASLST) for?

A class roster is distributed to faculty and to enter grades for a CRN.

#### **Question 2**

How do you roll grades to academic history using the (SFASLST) form?

Select the Roll check box in the Key Block, enter grades, and then save.

#### **Question 3**

What Banner forms are used to generate grade mailers?

None. Grade mailers are generated using processes and reports.

#### **Question 4**

What is the first process that must be run if you want to generate grade mailers?

The Grade Roll to Academic History Process (SHRROLL)

#### **Question 5**

Can you generate grade mailers for only a group of students?

Yes. A population selection can be run to generate grade mailers only for a selected group of students.

#### **Question 6**

What Banner form do you use to maintain students' degree information?

Degrees and Other Formal Awards Form (SHADEGR)

# **Question 7**

What is the Transcript Request Form (SHARQTC) used for?

Requesting a transcript for a single student ID

# **Question 8**

What process must be run for generating either single or multiple transcripts?

#### Academic Transcript Process (SHRTRTC)

# Appendix



# Section goal

The purpose of this section is to provide reference materials related to the workbook.

# **Forms Job Aid**

Form	Full Name	Use this Form to
SHAACST	Academic Standing Rules Form	used to establish the rules for identifying students who are in academic difficulty as well as those students who have a GPA which qualifies them for the Dean's List. The rules are established by each student level (graduate, undergraduate, etc.).
SHAGRDE	Grade Code Maintenance Form	used to capture and maintain all of the institution's grading symbols and associated quality points. In addition, this form also permits the end user to provide the rules governing which hours (earned, GPA, etc.) are affected by the specific grade symbol.
SHAGRDS	Grade Code Substitution Form	used to capture and maintain grade substitution entries. These entries are checked when a grade is posted to the student's record to ensure that the grade posted on the student's record is in agreement with the grading mode the student selected for the course.
SHARPTR	Repeat/Multiple Course Rules Form	used to create and maintain the institution's rules for determining when to consider a course as a repeat situation in registration, and whether (through academic history processing) to include or exclude a repeated or equivalent course in the student's GPA.
SHATPRT	Transcript Type Rules Form	used to create the rules associated with the type of transcript being requested. Examples of transcript type include External Official Transcript or Advisor Transcript.
STVTPRT	Transcript Type Code Validation Form	used to create, update, insert, and delete codes for transcript types, such as Official, Internal, Advising, and so on. This form is used by other forms to validate transcript type codes. You can create or update transcript type codes only from this form.

# Terminology

# Academic history

Grade reports, transcripts and degree records for a student.

#### CRN

Course reference number.

### **GPA**

Grade point average.