

# Banner Student Student System Overview Training Workbook

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Think before you print.

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# Banner Student System Overview



## Course goal

The goal of this workbook is to provide you with an overview of the Banner Student modules, menus, and terminology. Separate workbooks detailing the topics found within the Student module are available, containing detailed information about the forms and processes required for setup and day-to-day operations. The workbooks provide you with the knowledge and practice exercises to implement and use the Banner system.

## Course objectives

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

- identify where in the Banner Student process Banner interacts with people, institutions, and other systems
- navigate through the Banner Student main and submenus and explain the purpose of each module
- create QuickFlows and explain how they can be used in the Banner Student System.

## Intended audience

An executive or director who oversees the entire Student operation of your enterprise or a newly hired staff member who needs an overall understanding of the Banner Student System

## Prerequisites

To complete this workbook, you should have completed the Education Practices computer-based training (CBT) tutorial "Banner 8 Fundamentals," or have equivalent experience navigating in Banner.

# Process Overview

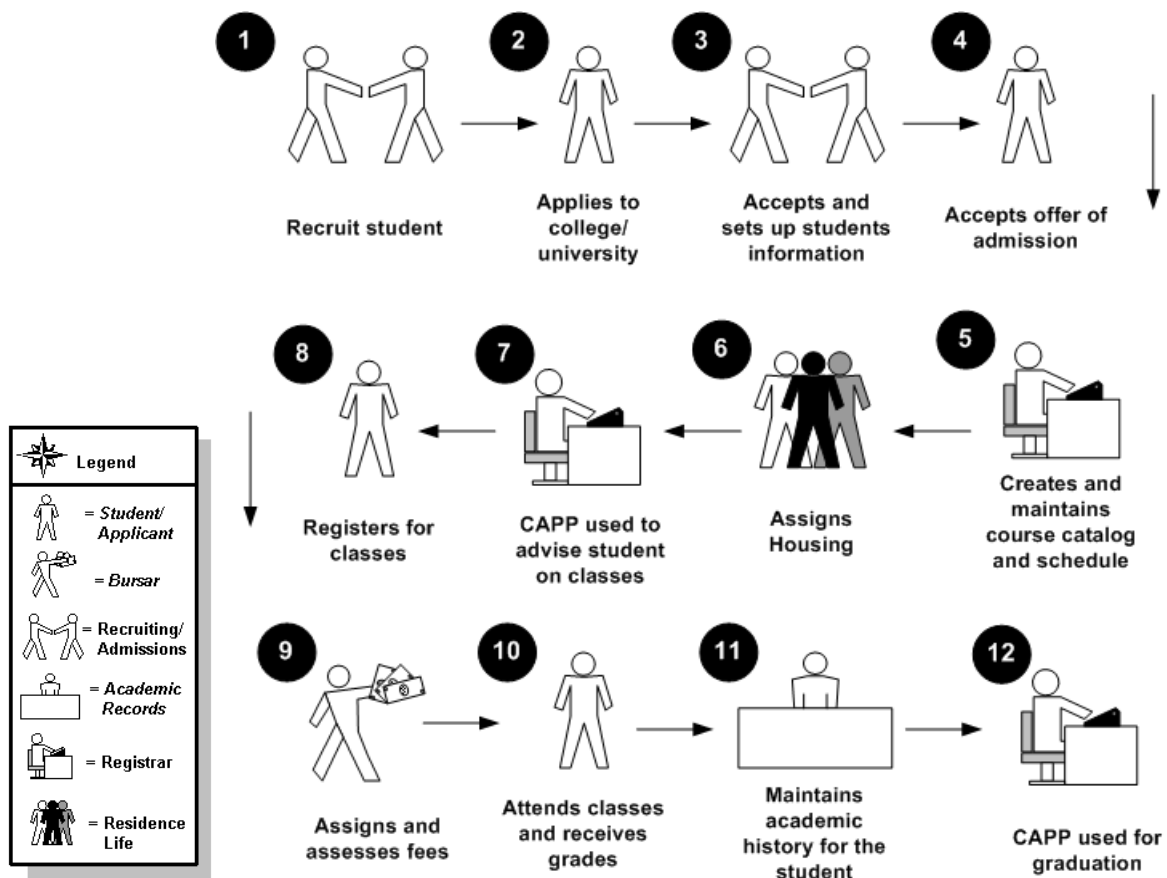
## About the process

A flexible, comprehensive solution to the problems of student administration, the Banner Student System sets a new standard for scheduling, registration, accounts receivable, academic history, and other functions in higher education. Banner Student supports the full range of functions necessary for student administration, including: creation of catalogs, data collection for scheduling of classes, admissions, assignment of housing, faculty workload analysis, and registration; all accounts receivable; and academic history and degree audit reporting.

Banner Student can be fully integrated with the Banner Finance, Banner Human Resources, Banner Advancement, and Banner Financial Aid systems.

## Flow diagram

This diagram highlights the Banner Student process from a student and administration perspective.



## About the process

This table identifies the people and systems that play a role in the Banner Student process.

<b>Stage</b>	<b>Description</b>
1	The Recruiting office recruits a prospect and creates an initial record for the prospect.
2	The prospect applies for admission to the institution and for the upcoming school year.
3	The Admissions office accepts the prospect and captures additional biographical information as necessary.
4	The prospect accepts the offer of admissions and becomes a student.
5	The Bursar's office assigns and assesses fees for the upcoming semester.
6	The Residence Life Office assigns housing.
7	The Registrar's Office creates and maintains the course catalog and schedule, and assigns faculty load.
8	The student registers for classes. In most cases, registration is completed online and does not require any assistance from the Registrar.
9	The Registrar assists the student in scheduling classes, if necessary.
10	The student attends classes and receives grades. Eventually the student will graduate from the institution, or possibly transfer to another institution or discontinue their studies.
11	The Academic Records office maintains the academic history for the student.

## Interfaces

The Banner Accounts Receivable module of Banner Student interfaces with Banner Finance and Banner Financial Aid. Banner Student also interfaces with Banner Advancement and Banner Human Resources.

# Banner Student System Menu

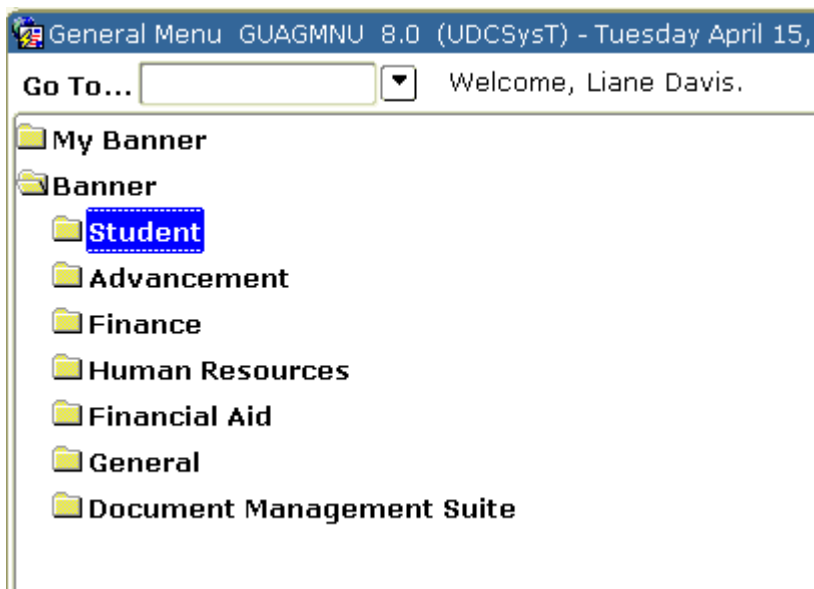
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## Introduction

You can use the Banner Student main menu to select from a list of the menus, forms, jobs, and QuickFlows. The main menu shows the various levels of menus and submenus available at your institution. Menus are nested. You can easily navigate through Banner by expanding these menus. Personal menus can be tailored to individual needs.

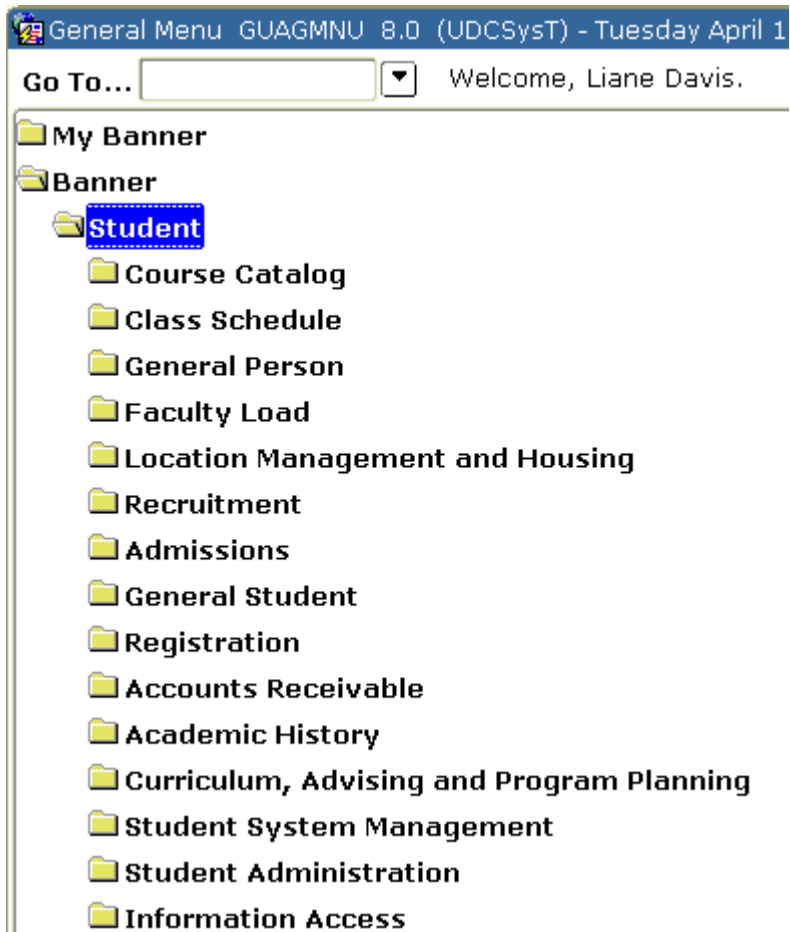
## Student menu

From the Banner main menu, select the Student menu (\*STUDENT).



## Student menu – expanded

The menu structure displays the submenus, or modules, that make up the Student menu.
















# Course Catalog Menu

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## Banner module purpose

The Course Catalog module enables you to define courses to be entered in the institution's catalog. This involves compiling of data such as course title, department, credit hours, co- or pre-requisites, fee information, and restrictions for the course. Start and end terms for each course are maintained, along with text to be printed on the course bulletin.

## Menu

-  **Course Catalog**
-  **Basic Course Information**
-  **Course Detail Information**
-  **Course Registration Restrictions**
-  **Catalog Prerequisite and Test Score Restrictions**
-  **Catalog Schedule Restrictions**
-  **Course Base Maintenance**
-  **Course Labor Distribution**
-  **College and Department Text**
-  **Course Syllabus**
-  **Course Search**

## Accessing the menus

You can access the Course Catalog menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Form</b>	<b>Enables you to...</b>
Basic Course Information (SCACRSE)	Create and maintain the basic course catalog information for your institution.
Course Detail Information (SCADETL)	Add more specific details to a course, such as additional course fees, co-requisites, equivalencies and course description.
Course Registration Restrictions (SCARRES)	Enter and maintain registration restrictions for specific courses based on student criteria.
Catalog Pre-requisite and Test Score Restrictions (SCAPREQ)	Maintain pre-requisite restrictions at the catalog level.
Catalog Schedule Restrictions (SCASRES)	Enter and maintain scheduling restrictions for specific courses by term and campus.
Course Base Maintenance (SCABASE)	Maintain the start and end terms of specific courses.
Course Labor Distribution (SCACLBD)	Build and maintain job labor distribution data at the course catalog level for adjunct faculty assignments
College/Department Text (SCATEXT)	Enter and maintain information about colleges and departments within colleges.
Course Syllabus (SCASYLB)	Create descriptions of learning objectives, required materials, and technical requirements available for the production of the course syllabus.
Course Search (SCASRCH)	Provide all non-term search capabilities to administrative users.

## Key points

In the Course Catalog module, you can

- build or change a course catalog
- create a CEU catalog entry
- build schedule restrictions on courses
- build registration restrictions on courses
- set up repeat/equivalent course rules
- waive tuition fees
- extract catalog data from Banner
- load catalog data from tape or another institution directly
- produce reports related to the course catalog.

## Associated workbooks

For additional information and training exercises on this topic, see the workbook titled "Course Catalog."




















# Class Schedule Menu

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## Banner module purpose

The Class Schedule module contains the data necessary to build and print a schedule of classes, including term attributes (dates for each session within a term), and establishing a Course Reference Number. In addition, instructors are assigned to classes, classes are scheduled into rooms depending on the attributes needed and available, and course sections with user defined comments are established. The Class Schedule module also provides a means of "rolling" the schedule forward to the next applicable term to decrease the data entry process. Block scheduling is maintained in this module.

## Menu

- 
-  **Class Schedule**
  -  **Schedule**
  -  **Schedule Detail**
  -  **Schedule Restrictions**
  -  **Schedule Prerequisite and Test Score Restrictions**
  -  **Schedule Labor Distribution**
  -  **Section Comment**
  -  **Section Web Controls**
  -  **Schedule Section Query**
  -  **Reserved Seats Inquiry**
  -  **Schedule Evaluation**
  -  **Schedule Override**
  -  **Schedule Calendar**
  -  **Schedule Processing Rules**
  -  **Section Syllabus**
  -  **Schedule Cross List**
  -  **Schedule Control**
  -  **Block Schedule**
  -  **Room Scheduler**
-

## Accessing the menus

You can access the Class Schedule menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Form</b>	<b>Enables you to...</b>
Schedule (SSASECT)	Build and maintain the schedule of classes, according to the definitions and restrictions that were created in the Course Catalog.
Schedule Detail (SSADETL)	Build and maintain detail schedule information, according to the definitions and restrictions created in the Course Catalog.
Schedule Restrictions (SSARRES)	Enter and maintain registration restrictions for specific sections of a course.
Schedule Pre-requisite and Test Score Restrictions (SSAPREQ)	Maintain pre-requisite restrictions at the schedule level.
Schedule Labor Distribution (SSACLBD)	Build and maintain job labor distribution data at the section level (CRN) for adjunct faculty assignments. The class section must first have been created using the Schedule Form (SSASECT)
Section Comment (SSATEXT)	Build and maintain the comments associated with a section.
Section Web Controls (SSAWSEC)	Determine the information by term and section that is displayed in Student Self-Service and Faculty and Advisors Self-Service.
Schedule Section Query (SSASECQ)	Display all sections currently on the system.
Reserved Seats Inquiry (SSIRESV)	Display Reserved Seats in the system for a particular CRN.
Schedule Evaluation (SSAEVAL)	Build and maintain schedule evaluation information for sections of courses by instructor.
Schedule Override (SSAOVRR)	Override catalog values at the section level.

<b>Sub Menu/Form</b>	<b>Enables you to...</b>
Schedule Calendar (SSAACCL)	Build and maintain the academic calendar information associated with a particular section.
Schedule Processing Rules (SSARULE)	Define and maintain rules for registration status codes, refunding, and extension processing at the section level, independent of part-of-term or static dates, and can be administered based on the individual learner.
Section Syllabus (SSASYLB)	House descriptions of learning objectives, required materials, and technical requirements, to be used in the production of the section syllabus.
Schedule Cross List Menu (*SCHEDXLST)	Create and maintain cross list information; query section, meeting time, and instructor information associated with a cross-listed group of courses.
Schedule Control Menu (*SCHEDULEA)	Establish various rules and controls related to the Schedule module.
Block Schedule Menu (*SCHEDULEB)	Enables you to create and query blocks.
Room Scheduler Menu (*SCHEDULER)	Set up rules and validation forms related to scheduling rooms.

## Key points

In the Class Schedule module, you can

- identify and assign instructors to sections
- identify classrooms
- create campus security
- create a future term schedule
- build and change course sections
- assign meeting times and rooms
- create sessions
- schedule contact hours
- create cross lists
- link courses
- create and modify restrictions
- reserve seats
- review reserved seats
- create blocks.

## Associated workbooks

For additional information and training exercises on this topic, see the workbook titled "Class Schedule."















# General Person Menu

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## Banner module purpose

The General Person module is where you define biographic and demographic information such as names and addresses, dates of birth, gender, marital status, medical information, and comments for a person. The information is specific to the person and does not relate to the person's involvement at your institution.

## Menu

-  **General Person [\*PERSON]**
-  **General Person Identification [SPAIDEN]**
-  **Address Summary [SOADDRQ]**
-  **General Person Telephone [SPATELE]**
-  **General Person [SPAPERS]**
-  **Person Comment [SPACMNT]**
-  **Emergency Contact [SPAEMRG]**
-  **Hold Information [SOAHOLD]**
-  **Person Appointments/Contacts [SOAAPPT]**
-  **Athletic Compliance [SGASPRT]**
-  **Athletic Compliance Inquiry [SGISPRT]**
-  **Mass Entry Athletic Compliance [SGAMSPT]**
-  **Athletic Academic Progress [SGAAPRG]**
-  **Support Services [\*SERVICES]**



## Accessing the menus

You can access the General Person menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
General Person Identification (SPAIDEN)	Capture biographic/demographic information for all persons/non-persons associated with the institution.
Address Summary (SOADDRQ)	Display all address information associated with a person or non-person, such as a vendor.
General Person Telephone (SPATELE)	Create an unlimited number of telephone numbers associated with a person.
General Person (SPAPERS)	Enter and maintain biographic information about a person.
Person Comment (SPACMNT)	Enter comment information on the person.
Emergency Contact (SPAEMRG)	Capture emergency contact information for persons.
General Medical Information (GOAMEDI)	View and update medical information and medical comments for persons at your institution, including students, faculty and staff.
Hold Information (SOAHOLD)	Assign holds to a person or entity.
Person Appointments/Contacts (SOAAPPT)	Add or update appointments and contacts for a person.
Athletic Compliance (SGASPRT)	Maintain and track athletic compliance and competition information for an athlete.
Athletic Compliance Inquiry (SGISPRT)	Query on and view athletic compliance record and athletic competition record summary information for an athlete.
Mass Entry Athletic Compliance (SGAMSPT)	Perform mass entry athletic compliance processing for athletes with compliance (sport) records.

Athletic Academic Progress (SGAAPRG)	Track the academic progress of an athlete for a degree.
Support Services Menu (*SERVICES)	Use the application and query forms related to Support Services.

## Key points

Person records must be created for inquirers, applicants, students, academic members of staff, and people living in institution accommodation. They must also be created for “non-persons” associated with your institution, such as vendors and companies.

The ID established for a person in a Person record is used throughout Banner Student.

Common matching reduces the opportunity for duplicate records.

## Associated workbooks

For additional information and training exercises on this topic, see the workbooks titled “General Person,” “Athletic Compliance” and “Support Services.”









# Faculty Load Menu

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## Banner module purpose

The Faculty Load module enables you to enter and maintain information including instructional and non-instructional assignments for a faculty member or advisor. Personnel information, such as tenure status and sabbatical dates, is maintained in this module along with workload and contract information.

## Menu

-  **Faculty Load**
-  **Faculty Personnel**
-  **Faculty/Advisor Information**
-  **Faculty Information Query**
-  **Faculty Degree Information**
-  **Faculty Assignment**
-  **Faculty Leave Assignment**
-  **Faculty Contract Analysis**
-  **Faculty Contract Query**
-  **Faculty Schedule Query**
-  **Available Faculty Query**
-  **Faculty/Advisor Query**
-  **Available Faculty By Term Query**
-  **Faculty Workload Control**

## Accessing the menus

You can access the Faculty Load menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Faculty Personnel (SIAPER)	Enter faculty information, such as, tenure, sabbatical dates, and years of experience.  Note: If Banner HR is installed, you MUST use PEAFACT for this function.
Faculty/Advisor Information (SIINST)	Enter and maintain faculty information which changes over time.
Faculty Information Query (SIINST)	Query information for a faculty member and display a view of data for that instructor by term over time.
Faculty Degree Information (SIADG)	Enter and maintain the degree information associated with a faculty member.
Faculty Assignment (SIAASGN)	Enter and maintain the assignment information for a term for a faculty member or advisor which can be a combination of class sections assigned and/or non-instructional assignments.
Faculty Leave Assignment (SIALVAS)	Track instructional and non-instructional assignments a faculty member would have been assigned for a term, had they not been on leave for that term.
Faculty Contract Analysis (SIACONA)	Perform the faculty contract analysis for a faculty member, based on the contract type.
Faculty Contract Query (SIACONQ)	View all the faculty members or advisors who are associated with a particular contract type.
Faculty Schedule Query (SIAASGO)	View a faculty member's instructional schedule.
Available Faculty Query (SIAFAVL)	Enter the selection criteria needed to schedule a faculty member into a section.

Sub Menu/Forms	Enables you to...
Faculty/Advisor Query (SIAIQRY)	Select key pieces of information about faculty members or advisors and to list the people who meet the selection criteria.
Available Faculty By Term Query (SOFAVQ)	Query and view available faculty information by category, staff, contract, college, or department.
Faculty Workload Control Menu (*FACCONTROL)	Perform setup related to faculty contracts.

## Key points

In the Faculty Load module, you can

- set up faculty workload rules
- create and maintain faculty information
- establish the instructional workload and assign faculty to classes
- perform faculty contract analysis
- assign an instructor to multiple contracts.
- Create an advisor to assign to students

## Associated workbooks

For additional information and training exercises on this topic, see the workbook titled "Faculty Load."


# Location Management and Housing Menu

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## Banner module purpose

The Location Management and Housing module allows for the definition of the institution's buildings and room facilities. In addition, the Location Management and Housing module provides a means of assigning rooms for special events, and provides a listing of available rooms with attributes. Dormitory, meal plan, and phone assignments, as well as assessments, may also be maintained in this module.

## Menu

-  **Location Management and Housing**
-  **Building Definition**
-  **Building Query**
-  **Room Definition**
-  **Housing and Meal Application**
-  **Roommate Application**
-  **Room Assignment**
-  **Available Housing Room Query**
-  **Phone Assignment**
-  **Meal Assignment**
-  **Housing Room Query**
-  **Event**
-  **Event Available Room Query**
-  **Location Management Control**

## Accessing the menus

You can access the Location Management and Housing menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Building Definition (SLABLDG)	Build and maintain data about all the buildings used for housing assignments, classrooms, and event scheduling.
Building Query (SLABQRY)	Display summary information about your institution's buildings.
Room Definition (SLARDEF)	Define rooms by term including capacity, type and building categories, and attributes.
Dorm Room and Meal Application (SLARMAP)	Enter and maintain room and meal application information.
Roommate Application (SLARMAT)	Create and maintain roommate applications by term that will be used in the batch scheduling process.
Room Assignment (SLARASG)	Create and maintain the information pertaining to applicants' room assignments.
Available Dorm Room Query (SLASGNO)	Query available dorm rooms based on specific room attributes.
Phone Assignment (SLAPASG)	Create and maintain the information pertaining to an applicant's phone assignments.
Meal Assignment (SLAMASG)	Create and maintain the information pertaining to the applicant's meal assignments for a specific range of terms.
Dorm Room Query (SLARUSE)	Display information for all dorm rooms in the system which have been assigned.
Event (SLAEVNT)	Define events.
Event Available Room Query (SLIAEVN)	Display a list of rooms available in a specified date and time range.
Location Management Control Menu (*LOCACONTROL)	Establish rules and controls associated with room, meal, and phone assignments.

## Key points

In the Location Management and Housing module, you can

- define buildings and rooms
- set up housing validation and control rules
- define housing-related fee assessment codes and rules
- create residence hall room and meal applications
- enter room, meal, and phone assignments.

## Associated workbooks

For additional information and training exercises on this topic, see the workbook titled "Location Management and Housing."



# Recruitment Menu

---

## Banner module purpose

The Recruitment module maintains information about potential recruits such as, source, intended majors, test scores, high school and prior college information, and outside interests. It builds statistical information about sources and a plan for producing materials, and allows for creation of materials to be sent to prospects.

## Menu

-  **Recruitment**
-  **Prospect Information**
-  **Quick Recruit**
-  **Recruiters Prospect**
-  **Recruiters Appointments/Visits**
-  **Source/Background Institution Base**
-  **Source/Background Institution Year**
-  **Source/Background Institution Query-Only**
-  **Source Visits/Prospects**
-  **Communication Plan Rules and Control**
-  **Curriculum Rules and Control**
-  **Search Tape Load**
-  **Web for Prospects**

## Accessing the menus

You can access the Recruitment menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Prospect Information Menu (*RECRUITP)	Use various forms to capture and view information on prospects.
Quick Recruit (SRAQUIK)	Enter home address, high school, prior college, and all necessary recruiting information quickly.
Recruiters Prospect (SRARINF)	Display all of the prospects that a recruiter is responsible for in a given term.
Recruiters Appointments/Visits (SRARAPT)	Schedule and record daily appointments on campus and visits to other sources.
Source/Background Institution Base (SOASBGI)	Capture general information, such as address, comments, and contacts, about a source or background institution.
Source/Background Institution Year (SOABGIY)	Capture yearly information about a source or background institution.
Source/Background Institution Query-Only (SOISBGI)	Query source and background information by high school or college.
Source Visits/Prospects (SRASRCE)	Display the recruiter's activity from the source's point of view.
Communication Plan Rules and Control Menu (*COMMPLAN)	Setup a Communication Plan.
Curriculum Rules and Control Menu (*CURRIC)	Perform setup related to curriculum.
Search Tape Load Menu (*SEARCHTAPE)	Perform setup, query, and view records loaded from a tape.
Web for Prospects Menu (*WEBPROS)	Perform various functions related to Prospect Self-Service.

## Key points

In the Recruiting module, you can

- add, maintain, and review prospects
- add and maintain test scores, high school, and prior college information
- assign and review recruiter's appointments and visits
- capture and build statistical information on source, high school, or college
- produce system-generated letters
- analyze recruiting enrollment
- schedule appointments
- perform Communication Plan processing
- perform Electronic Prospects processing
- perform Tape Load processing.

## Associated workbooks

For additional information and training exercises on this topic, see the workbooks titled "Recruitment" and "Prospect Self-Service."


















# Admissions Menu

---

## Banner module purpose

The Admissions module establishes admission records and identifies items an applicant needs to provide to continue applications processing. It calculates whether an applicant can be automatically admitted to the institution based on user defined rules. General Student records are automatically created once an applicant has accepted and plans to attend. Tests scores, high school, and prior college information are maintained here, along with guardian information. The Admissions module also provides the means to allow quick entry for automatic registration eligibility.

## Menu

-  **Admissions**
-  **Admissions Application**
-  **Admissions Application Summary**
-  **Admissions Decision**
-  **Guardian Information**
-  **Quick Entry**
-  **Student Mail**
-  **Person Appointments/Contacts**
-  **Application Supplemental Information**
-  **Application Questions and Answers**
-  **Admissions Mass Entry**
-  **Mass Entry Audit**
-  **Selective Admissions**
-  **Admissions Control**
-  **Educational Background**
-  **Web Admissions Control**
-  **Electronic Data Interchange (EDI) Control**

## Accessing the menus

You can access the Admissions menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Admissions Application (SAAADMS)	Enter and maintain admissions application and checklist items.
Admissions Application Summary (SAASUMI)	Query and display summary of applications entered for a person or recruit whether the records are active or inactive.
Admissions Decision (SAADCRV)	Enter decisions for an applicant or request the automated decision process.
Guardian Information (SOAFOLK)	Enter and maintain guardian information for a person.
Quick Entry (SAAQUIK)	Enter data to allow a student to register.
Student Mail (SUAMAIL)	Update and display mailings for a student.
Person Appointments/Contacts (SOAAPPT)	Set up appointments and contacts for a person.
Application Supplemental Information (SOASUPL)	Record application information which has no other logical placement in the Banner admissions application data structure.
Application Questions and Answers (SAAQUAN)	Display an application summary and store free format questions and answers collected during the application process.
Admissions Mass Entry (SAAMAPP)	Search for a particular group of Applicants, create admissions criteria and make admissions decision in one action.
Mass Entry Audit (SOAMAUD)	Review the results of a Mass Admissions Entry.
Selective Admissions Menu (*SELECTIVEADM)	Perform functions related to Selective Admissions.

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Admissions Control Menu (*ADMCONTROL)	Set up various rules related to Admissions.
Educational Background Menu (*EDBACK)	Gather and query information related to a person's educational background.
Web Admissions Control Menu (*WEBCONTROL)	Set up rules related to Web applications and admissions.
Electronic Data Interchange (EDI) Control Menu (*EDICONTROL)	Set up rules and perform tasks associated with the EDI process.

## Key points

In the Admissions module, you can

- define admissions rules
- create application records
- admit students individually or in groups
- work with AMCAS procedures
- produce various reports.

## Associated workbooks

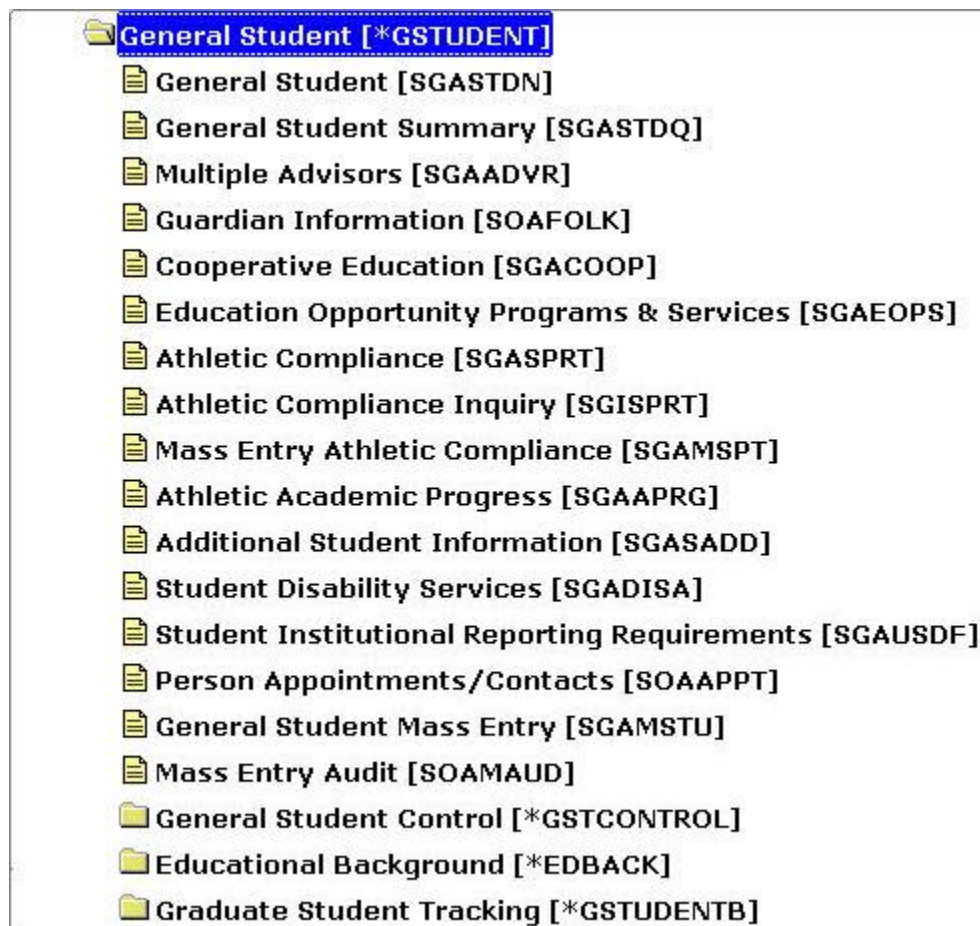
For additional information and training exercises on this topic, see the workbooks titled "Admissions" and "Selective Admissions."

# General Student Menu

## Banner module purpose

The General Student module allows you to modify current information for students such as changes to major, residency, and student type. It also provides a place for entering information on career choice, including advisor, activities, and veteran information. Student classification and cooperative information, as well as Student Right to Know information, is maintained here.

## Menu



## Accessing the menus

You can access the General Student menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
General Student (SGASTDN)	Maintain a history of student data.
General Student Summary (SGASTDQ)	Query and display all student records on file for a student from the term represented in the Key Information back to the earliest record on file.
Multiple Advisors (SGAADVR)	Associate a student with unlimited advisors for an effective term.
Guardian Information (SOAFOLK)	Maintain guardian name and address data.
Cooperative Education (SGACOOB)	Maintain data on cooperative education programs.
Education Opportunity Programs & Services (SGAEOPS)	Maintain the EOPS data for a term, including the status, acceptance date, and eligibility factor codes.
Athletic Compliance (SGASPRT)	Maintain and track athletic compliance and competition information for an athlete.
Athletic Compliance Inquiry (SGISPRT)	Query on and view athletic compliance record and athletic competition record summary information for an athlete.
Mass Entry Athletic Compliance (SGAMSPT)	Perform mass entry athletic compliance processing for athletes with compliance (sport) records.
Athletic Academic Progress (SGAAPRG)	Track the academic progress of an athlete for a degree.
Additional Student Information (SGASADD)	Maintain cohort and student attribute information which is assigned to the student by effective term.
Student Disability Services (SGADISA)	Capture information about disabilities, as well as services provided for those disabilities, for a student on a term-by-term basis.



<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Student Institutional Reporting Requirements (SGAUSDF)	Maintain information about students which is specifically required by the institution on a term-by-term basis.
Person Appointments/Contacts (SOAAPPT)	Set up appointments and contacts for a person.
General Student Control Menu (*GSTCONTROL)	Maintain rules for classifying students by hours earned.
Educational Background (*EDBACK)	Gather and query information related to a person's educational background.
Graduate Student Tracking (*GSTUDENTB)	Process and query information related to graduate students, including transcripts, degrees, and internship information.

## Key points

In the General Student module, you can

- review and change current student information
- track students' athletic compliance and competition records
- work with Student Right to Know reporting
- assign education opportunity programs and services
- establish student classifications
- determine class standing
- add and maintain test scores, high school, and prior college data
- review student data and veteran data
- track cooperate education information.

## Associated workbooks

For additional information and training exercises on this topic, see the workbooks titled "General Student" And "Athletic Compliance."
























# Registration Menu

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## Banner module purpose

The Registration module allows for the creation of enrollment information for a specific term. It defines rules determining student and course statuses, and controlling actions to be taken at registration, such as amounts of allowable refunds. Tuition and fee policy is built in Registration, along with rules to be used for the fee assessment algorithm. Student schedules and bills are produced, and class rosters are maintained. It also allows for sections to be graded and rolled into academic history.

## Menu

-  **Registration**
-  **Student Course Registration**
-  **Registration Additional Fees**
-  **Registration Query**
-  **Student Course/Fee Assessment Query**
-  **Class Roster**
-  **Class Attendance Roster**
-  **Student Course Registration Audit**
-  **Enrollment Verification Request**
-  **Enrollment Verification Status**
-  **Student Course Request**
-  **Communication Plan Assignment**
-  **Communication Plan Collector**
-  **Student Registration Group**
-  **Student Registration Permit-Override**
-  **Student Registration History and Extension**
-  **Registration Mass Entry**
-  **Mass Entry Audit**
-  **Registration Control**
-  **Title IV**
-  **Registration Waitlist**

## Accessing the menus

You can access the Registration menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Student Course Registration (SFAREGS)	Register students for course selections and perform adds, drops, and withdrawals.
Registration Additional Fees (SFAEFEE)	Add additional charges to the student fee assessment.
Registration Query (SFAREGQ)	Display the student's schedule with meeting times, buildings, and rooms.
Student Course/Fee Assessment Query (SFAREGF)	Display fee assessment as calculated by the system.
Class Roster (SFASLST)	Enter grades for a class and display the class roster.
Class Attendance Roster (SFAALST)	Enter final grades and hours of attendance for courses.
Student Course Registration Audit (SFASTCA)	Show the results of course requests in the database for all registration processing.
Enrollment Verification Request (SFARQST)	Request visual and/or hard copy retrieval of the most commonly requested enrollment data for students.
Enrollment Verification Status (SFAROSS)	View enrollment verification requests and to update the print date as needed.
Student Course Request (SFACREQ)	Enter requests for the batch scheduler process.
Communication Plan Assignment (SOAPLAN)	Assign communication plans to a person who has a recruiting record, an admissions application, or a general student record.
Communication Plan Collector (SOACCOL)	View a list of people who have been added to the collector file for batch processing of communication plans.

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Student Registration Group (SFARGRP)	Assign a registration group to individual students on a term-by-term basis.
Student Registration Permit-Override (SFASRPO)	Assign specific permit-override codes to individual students on a term and course or section basis.
Student Registration History and Extension (SFARHST)	View registration records for a student without regard to term in which the registration took place.
Registration Mass Entry (SFAMREG)	Perform student registrations for groups based on selection criteria specified on the Mass Entry form.
Mass Entry Audit (SOAMAUD)	Review the student registration activity entered via the Registration Mass Entry form.
Registration Control Menu (*REGCONTROL)	Define rules and controls related to Registration.
Title IV Menu (*TITLEIV)	Define break periods, withdraw a student for a term, or view and query withdrawal information.
Registration Wait List (*REGWAITLIST)	Track and process wait listing.

## Key points

In the Registration module, you can

- define registration rules
- create and maintain student records
- register students
- grade courses and roll to history
- create reports listing registration information.

## Associated workbooks

For additional information and training exercises on this topic, see the workbook titled "Registration."



# Accounts Receivable Menu






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## Banner module purpose

The Accounts Receivable module establishes accounts receivable controls, including, detail codes identifying charges or payments; default values, methods of payment, and how credits are handled; and messages to print on bills.

The Accounts Receivable module displays term-specific tuition, housing, meal plan, and fee charges, and calculates exemptions and contracts for eligible students. Along with maintaining account information for non-student accounts, payments are entered here and accounts can be reviewed and updated. This module allows for establishing installment plans for accounts and third-party contracts. Billing and invoicing are controlled from this module, along with collection agency assignments. Reports can be generated detailing activity of cashiers, unpaid charges for accounts, and account transactions.

## Menu

-  **Accounts Receivable**
-  **General Controls and Cashiering**
-  **Accounts Receivable**
-  **Student Accounts Receivable**
-  **Accounts Receivable Validation Forms**

## Key points

The Accounts Receivable module is used to maintain charge and payment information for individual accounts. Many of the module's features are shared between Banner Student and Banner Finance; it is also designed to interface with non-Banner products as well.

A customer profile enables you to establish customer accounts, including credit limits, which you can set for a particular customer and an entity type code. This enables you to establish customer categories for billing and reporting purposes. An application of payment process allows for various user-selected methods to apply payments to charges.

The Accounts Receivable System supports billing on an individual invoice basis, as well as a periodic statement that includes previous balance, current charges and payments, and balance due. All information about an account is available in various levels of detail using online queries to support account analysis.

A cashiering component of Accounts Receivable supports online processing of all types of payments, including credit cards. The cashier checkout function ensures accounting for all monies and that the system forwards and updates all related accounting transactions in the General Ledger. You can have the system process miscellaneous non-debtor related cash receipts, so that the system can account for all monies that your institution handles through this module.

## Associated workbooks

For additional information and training exercises on this topic, see the workbook titled "Accounts Receivable."




















# Academic History Menu

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## Banner module purpose

The Academic History module enables you to build grading policies and maintain grades. Grades are rolled to Academic History, and the system automatically checks for repeat courses. Academic standing is calculated using user-defined rules regarding probation and Dean's List policies. Grade mailers are produced in this module and term GPA information is maintained here. Degrees and honors associated with each student are entered in this module, along with information on majors, minors, and status. Transfer course work is recorded in the Academic History module, and an automatic transfer articulation process is available. The transcripts are also printed from here. Graduation information, including diploma, ceremony, ceremony attendance, and graduation dress, is maintained here.

## Menu

-  **Academic History [\*AHISTORY]**
-  **Transfer Course Information [SHATRNS]**
-  **Degree and Other Formal Awards [SHADEGR]**
-  **Degree Summary [SHADGMQ]**
-  **Course Summary [SHACRSE]**
-  **Term Course Maintenance [SHAINST]**
-  **Transcript Events and Comments [SHATCMT]**
-  **Qualifying Paper [SHAQPNO]**
-  **Academic Non-Course [SHANCRS]**
-  **Pre-Banner Summary Hours and GPA [SHAPCMP]**
-  **Academic History Process Control [\*AHISTORYA]**
-  **Transcript and Advisor [\*AHISTORYB]**
-  **Transfer Articulation [\*AHISTORYC]**
-  **Graduation [\*AHISTORYD]**
-  **Committee/Service Information [\*AHISTORYE]**
-  **EDI Transcript Upload Processing [\*AHISTORYF]**
-  **XML Transcript Processing [\*AHISTORYG]**

## Accessing the menus

You can access the Academic History menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Transfer Course Information (SHATRNS)	Maintain transfer institution and course work for a student.
Degree and Other Formal Awards (SHADEGR)	Display degrees being sought or awarded to the student.
Degree Summary (SHADGMQ)	Query and display summary information about all of the degrees which the student is seeking or has been awarded.
Course Summary (SHACRSE)	List institutional course work for a student by term.
Term Course Maintenance (SHAINST)	Maintain institutional course history, allow grade changes, and provide a place to identify repeat courses.
Transcript Events and Comments (SHATCMT)	Enter comments about a student that will print on the transcript.
Qualifying Paper (SHAQPNO)	Record papers needed for a degree.
Academic Non-Course (SHANCRS)	Tie papers, committees, or events together as non-courses associated with a degree in Academic History.
Pre Banner Summary Hours and GPA (SHAPCMP)	Enter bulk hours prior to Banner for a student by level for institutional/transfer work.
Academic History Process Control Menu (*AHISTORYA)	Perform setup related to Academic History, including establishing a grading policy, and entering information such as academic standing and progress probation policy.
Transcript and Advisor Menu (*AHISTORYB)	Enter and view information related to transcripts, course history, and academic standing.

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Transfer Articulation Menu (*AHISTORYC)	Enter and maintain information related to transfer institutions and courses.
Graduation Menu(*AHISTORYD)	Enter, maintain, and view information regarding degrees, diplomas, and graduation.
Committee/Service Information Menu (*AHISTORYE)	Used to process and view committee/service information.
EDI Transcript Upload Processing Menu (*AHISTORYF)	Setup, maintain, and display information relating to EDI transcript processing.
XML Transcript Processing (*AHISTORYG)	Used to process XML transcripts.

## Key points

Some of the tasks you can perform in the Academic History module include

- enter pre-Banner data
- build, enter, and roll grades to Academic History
- build/change term header information
- build academic standing rules and calculate academic standing
- produce grade mailers
- add/change degrees
- enter/maintain transfer course work
- add/change transcript events and comments
- enter qualifying papers
- review academic history online
- print transcripts
- process web transcript requests
- perform transfer articulation
- perform task related to graduation, ceremony, and diploma.

## Associated workbooks

For additional information and training exercises on this topic, see the workbook titled "Academic History."








# Curriculum, Advising, and Program Planning Menu

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## Banner module purpose

The Curriculum, Advising and Program Planning (CAPP) module builds degree program codes establishing appropriate majors, minors, and concentrations for degree programs. All requirements, both general (i.e., minimum GPA, minimum hours) and course specific (i.e., humanity or social science requirement), are built in this module. Automatic assignment of a degree program code occurs if a student meets all the requirements for an established degree program. Non-course requirements are approved in this module. This module is also used to assign courses to multiple requirements, and execute compliance verification.

## Menu

-  **Curriculum, Advising and Program Planning**
-  **CAPP Requirements**
-  **CAPP Inquiry**
-  **Compliance Information**
-  **Curriculum Rules and Control**
-  **CAPP Student Adjustments**
-  **WebCAPP**

## Accessing the menus

You can access the Curriculum, Advising, and Program Planning menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu</b>	<b>Enables you to...</b>
CAPP Requirements Menu (*CAPREQ)	Define all the requirements for programs, areas, and groups.
CAPP Inquiry (*CAPPINQ)	Query the database to see what programs, groups, and areas already exist.
Compliance Information Menu (*COMPLY)	Request a compliance for a person, or review compliance results.
Curriculum Rules and Control (*CURRIC)	Set up your curriculum control and rules.
CAPP Student Adjustments (*ADJUST)	Vary program, area, or group requirements for a student.
WebCAPP (*WEBCAPP)	Set up the controls for the WebCAPP rules for evaluation requests.

## Key points

CAPP acts like a “thinking” online course catalog. Each of the following key components of your course catalog are placed into CAPP.

- The programs that you offer at your institution
- The areas within those programs
- The requirements that are part of each area

The **Program** is the goal or objective against which you want to measure student progress. Some general requirements, like minimum courses and/or credits and non-course requirements, can be defined at the program level.

**Areas** are the subsets of a program’s requirements and might correspond to “core requirements” or “major requirements.”

**Groups** are subsets of an area’s requirements and might correspond to “social science core requirements” or the “humanities component of the core requirements.”

**Course/Attribute Requirements** are the individual detail requirements. Detail requirements can be attached directly to areas or may be part of a group which is attached to an area. Either details or groups can be attached to an area, but not both.

Note: Visualize these components as a hierarchical structure. The programs are your highest level and have areas attached to them. If you choose to use groups, they are attached to and appear at the level below their areas. Details are attached to groups or directly to areas.

## Associated workbooks

For additional information and training exercises on this topic, see the workbook titled “Curriculum, Advising, and Program Planning.”






# Student System Management Menu

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## Banner module purpose

The Student System Management module is used for tape load processing and rule creation, as well as for person and non-person system searches.

## Menu

-  **Student System Management**
-  **Tape Code Conversion**
-  **Person Search**
-  **Person Search Detail**
-  **Non-Person Search**



## Accessing the menus

You can access the Student System Management menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Tape Code Conversion (SOTCNVT)	Convert codes on interface tapes to valid Banner values before fields are added to the system.
Person Search (SOAIDEN)	Determine the correct ID number for a person using the query capabilities of the system.
Person Search Detail (SOAIDNS)	Display the information relating to the person in the search, in greater detail.
Non-Person Search (SOACOMP)	Determine the correct ID number for a non-person using the query capabilities of the system.

## Associated workbook

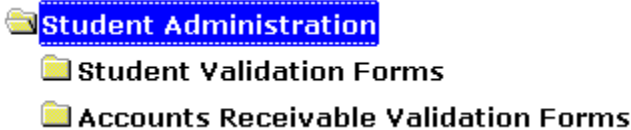
While there is no Banner 7 workbook specifically for Student System Management, there are related workbooks. The workbook titled "General Person" contains some exercises and training materials on topics related to Student System Management.

# Student Administration Menu

## Purpose

The Student Administration module provides a quick way to access validation forms needed for Student System setup and Accounts Receivable setup.

## Menu



## Accessing the menus

You can access the Student Administration menu from the Student menu (\*STUDENT). This menu displays these submenus:

Sub Menu	Enables you to...
Student Validation Forms (*STDVALD)	Access and set up various validation forms used in the Banner Student System.
Accounts Receivable Validation Forms (*TARVALD)	Access and set up validation forms related to Banner Accounts Receivable.

## Associated workbook

There is no Banner 7 training workbook specifically for Student Administration. Validation forms are covered in specific Banner training workbooks for the modules in which they are applicable.










# Information Access Menu

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## Banner module purpose

The Information Access module maintains information used in telephone registration processing and electronic admissions processing via the Web.

## Menu

-  **Information Access**
-  **Alternate Personal Identification Number**
-  **Third Party Registration Time Controls**
-  **Credit Card Type Validation Page**
-  **Web Display List Customization**
-  **Web Admissions Control**
-  **Web for Faculty & Advisors**
-  **Electronic Data Interchange (EDI) Control**
-  **Web for Prospects**
-  **WebCAPP**
-  **ESIS Statistics Canada Menu**
-  **T2202A**

## Accessing the menus

You can access the Information Access menu from the Student menu (\*STUDENT). This menu displays these submenus:

<b>Sub Menu/Forms</b>	<b>Enables you to...</b>
Alternate Personal Identification Number (SPAAPIN)	Assign a Personal Identification Number to a student in voice response registration or third-party self-service registration.
Third Party Registration Time Controls (SFARGTC)	Define the time periods in which students have access to third-party registration add/drop activity based upon their personal and academic characteristics.
Credit Card Type Validation (TTVCCRD)	Define valid credit card types that are accepted by your institution for voice response and Web credit card payment processing.
Web Display List Customization (SOAWDSP)	Define the validation table codes that can be displayed on the Web for open learning courses and registration information.
Web Admissions Control Menu (*WEBCONTROL)	Set up rules and controls related to Web applications and admissions.
Web for Faculty & Advisors Menu (*WEBFAC)	Set up grade scales and gradable components, grant Web access, and assign roles to Faculty and Advisors.
Electronic Data Interchange (EDI) Control Menu (*EDICONTROL)	Set up rules and controls, and perform other activities related to EDI processing.
Web for Prospects Menu (*WEBPROS)	Set up and customize prospect information displayed on the Web.
WebCAPP Menu (*WEBCAPP)	Set up the controls for the WebCAPP rules for evaluation requests.
ESIS Statistics Canada Menu	Menu for collecting statistics required in Canada
T2202A	Menu for collecting federally required statistics and information.

## Associated workbook

While there is no Banner 8 workbook specifically for Information Access, the workbooks titled "Faculty and Advisor Self-Service," "Prospect Self-Service," and "Curriculum, Advising and Program Planning" contain some exercises and training materials on topics related to Information Access.

# Creating and Using Quick Flows

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## Description

The QuickFlow form (GUAQFLW) permits you to call the defined sequence of forms established by the QuickFlow Definition form (GUAQUIK). When you enter the QuickFlow name and click **Start**, the system executes the first form defined in the QuickFlow list. After you exit the first form in the list, the system executes the second form in the QuickFlow list. This pattern continues until the system executes all of the forms in the quick flow list.

Note: You can only execute QuickFlow lists that were defined in the GUAQUIK form. Define the quick flow code with the Quick Flow Code Validation form (GTVQUIK).

## Steps

Create a quick flow for a process that requires many different forms to be completed. Your instructor will identify the appropriate form names to use.

1. Access the QuickFlow Code Validation form (GTVQUIK).

QuickFlow Code Validation GTVQUIK 8.0 (BAN8)

Code	Description	Activity Date
ADM	Admissions List	10-SEP-1990
ADMG	Admission QF test of SAAQUAN	24-JAN-2007
ADMR	Define Applicant Codes	03-JUL-1997
ADV-IND	Advancement Individual	10-MAR-2008
AHR	Define Grade Processing Rules	03-JUL-1997
AJV	Recruit Test	10-SEP-1998
APP	Application Procedure	04-MAR-1991
APPLICANT	New Application	04-FEB-2008
BIO	Entering Biographic Info.	10-MAY-1996
BUDG	Budget Inquiry	14-MAY-1997
CATR	Define Codes for Course Data	03-JUL-1997
CLD	Cindy's Test	06-JAN-1997
CNCT	Create New Communication Track	08-JUL-1997
COBR	COBRA Procedure	06-MAR-1991
COST	Identify Employees for Billing	07-JUL-1997
DANL	Dan's Test	07-MAR-2003
DAVE	Dave's test list	15-JAN-1997
DGR	Define Degree Codes	03-JUL-1997
DROP	Follow-Up on Installments	10-JUL-1997
EDD	Admission quick create	25-JUN-2004
ENT	Constituent Entry	13-MAY-1998
F-AW	Fin Aid Awarding	06-FEB-2008

2. Perform an **Insert Record** function.
3. Enter a QuickFlow code in the **QuickFlow** field per your instructor.
4. Enter a description in the **Description** field of the QuickFlow code per your instructor.
5. Click the **Save** icon.
6. Click the **Exit** icon.

7. Access the QuickFlow Definition form (GUAQUIK).

8. Enter the code in the **QuickFlow** field you just created on the QuickFlow Code Validation form (GTVQUIK).
9. Perform the **Next Block** function.
10. Enter the form name(s) required for the QuickFlow process in the **Existing** field in the order you will process the information.
11. Enter the forms in the order they should be accessed.

Note: You can use the **Find** field to search for the required form, using the % sign as a wildcard.

12. Click the **Save** icon.
13. Click the **Exit** icon.
14. Access the QuickFlow form (GUAQFLW).

15. Enter the name of the QuickFlow process that you created in Step 3 in the **QuickFlow** field or the down arrow to find it...

Note: You can also access QuickFlows by typing the QuickFlow code in the **Go To** field.



16. Click the **Start** button.
17. Exit through each of the forms in the process to return to the QuickFlow form.
18. Click the **Exit** icon.

# Creating a Personal Menu

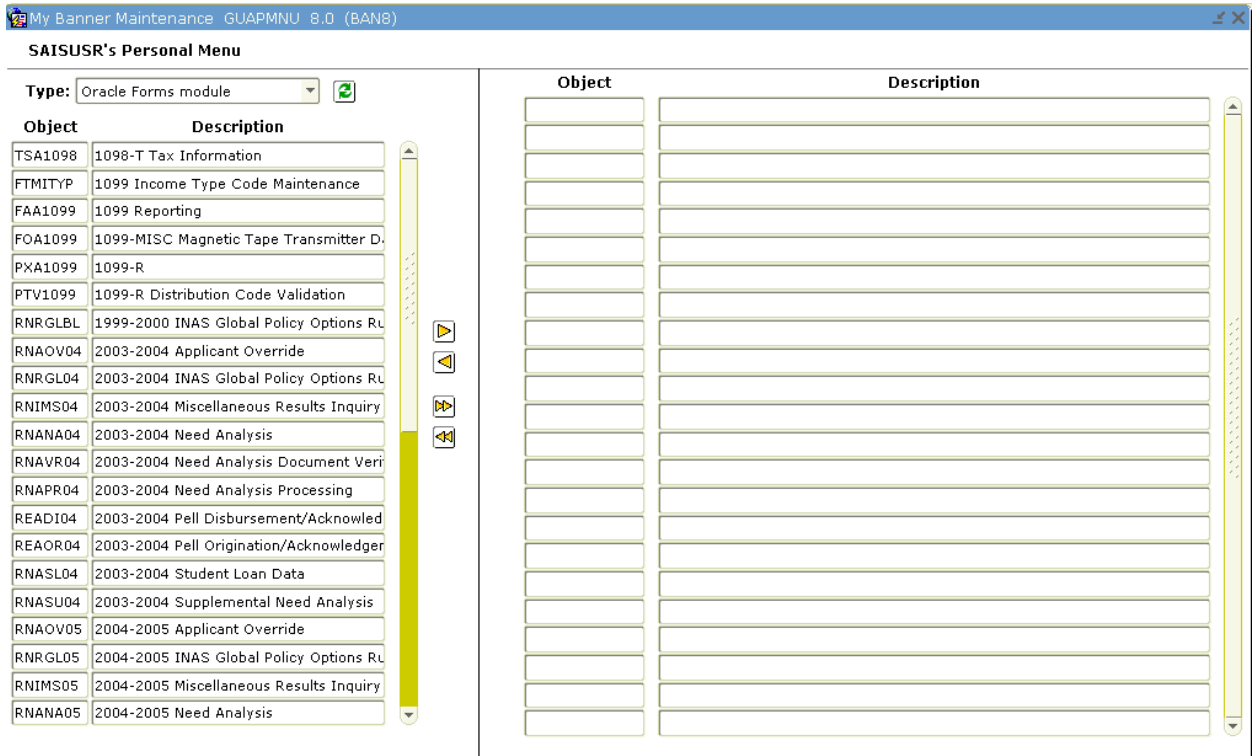
## Overview

My Banner is a “personal menu” that appears at the top of the Banner main menu and in the product links bar. My Banner allows quick access to forms, jobs, menus, and QuickFlows that are most important in your daily work.



## Banner form

By using the Personal Menu Maintenance Form (GUAPMNU), you can create and change your personal menu.



## Steps

Follow these steps to create a personal menu.

1. Access the Personal Menu Maintenance Form (GUAPMNU).
2. Use the pull-down list above the left pane to select the object type you want to display.

Example: *Form, Jobs, QuickFlow*

Result: The left pane lists the objects of the selected type.

3. In the left pane, use your mouse to select each object you want to add to the menu. When you select an object, the name is highlighted.

Note: You can hold down the Shift key to select more than one object.

4. Repeat steps 2 and 3 for each object type you want to add to the menu.
5. Click in the right pane where you want to place the new menu items.
6. Click the **Insert Selection** button in the middle of the form.
7. Customize the object descriptions.

Note: This is optional.

8. Click the **Save** icon.

# Self Check

## Directions

Match the Banner module from the list on the left with the description on the right. Try to do this without using your workbook notes.

- |   |       |   |
|---|-------|---|
| a. Course Catalog                             | _____ | 1. Enables you to enter and maintain information on instructional and non-instructional assignments, as well as personnel and contract information. |
| b. Class Schedule                             |       |   |
| c. General Person                             |       |   |
| d. Faculty Load                               |       |   |
| e. Location Management and Housing            | _____ | 2. Enables you to build grading policies, enter degrees and honors, and record transfer course work.  |
| f. Recruitment                                |       |   |
| g. Admissions                                 |       |   |
| h. General Student                            | _____ | 3. Allows you to define course information, such as course title, department, credit hours, prerequisites, etc.                                     |
| i. Registration                               |       |   |
| j. Accounts Receivable                        |       |   |
| k. Academic History                           |       |   |
| l. Curriculum, Advising, and Program Planning | _____ | 4. Allows for the creation of enrollment information for a specific term; tuition and fee policy are also built here.                               |
| m. Student System Management                  |       |   |
| n. Student Administration                     |       |   |
| o. Information Access                         | _____ | 5. Enables you to build a schedule of classes, assign instructors, and schedule rooms.  |
|   | _____ | 6. Builds degree program codes establishing appropriate majors, minors, and concentrations for degree programs.                                     |
|   | _____ | 7. Allows you to define buildings and rooms, as well as make dormitory, meal plan, and phone assignments.   |
|   | _____ | 8. Used to define biographic and demographic information that is specific to a person or non-person.  |
|   | _____ | 9. used for tape load processing and rule creation, as well as for person and non-person system searches.   |

- \_\_\_\_\_ 10. Identifies items an applicant needs to provide; test scores, high school, and prior college information are maintained here.
- \_\_\_\_\_ 11. Provides a way to access validation forms needed for Student System setup and Accounts Receivable setup.
- \_\_\_\_\_ 12. Maintains information about prospects, builds statistical information, and allows for the creation of materials sent to prospects.
- \_\_\_\_\_ 13. Displays term-specific tuition, housing, meal plan, and fee charges, and calculates exemptions and contracts for eligible students; payments are entered here.
- \_\_\_\_\_ 14. Allows you to modify current student information and enter information on career choice, advisor, and veteran information.
- \_\_\_\_\_ 15. Maintains information used in telephone registration processing and electronic admissions processing.

## Question 16

Create a QuickFlow for one of the modules. Try to do this without looking at the steps presented in the QuickFlow exercise.

# Answer Key for Self Check

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## Matching

- D.** 1. Enables you to enter and maintain information on instructional and non-instructional assignments, as well as personnel and contract information.
- K.** 2. Enables you to build grading policies, enter degrees and honors, and record transfer course work.
- A.** 3. Allows you to define course information, such as course title, department, credit hours, prerequisites, etc.
- I.** 4. Allows for the creation of enrollment information for a specific term; tuition and fee policy are also built here.
- B.** 5. Enables you to build a schedule of classes, assign instructors, and schedule rooms.
- L.** 6. Builds degree program codes establishing appropriate majors, minors, and concentrations for degree programs.
- E.** 7. Allows you to define buildings and rooms, as well as make dormitory, meal plan, and phone assignments.
- C.** 8. Used to define biographic and demographic information that is specific to a person or non-person.
- M.** 9. Used for tape load processing and rule creation, as well as for person and non-person system searches.
- G.** 10. Identifies items an applicant needs to provide; test scores, high school, and prior college information are maintained here.

- N.** 11. Provides a quick way to access validation forms needed for Student System setup and Accounts Receivable setup.
  
- F.** 12. Maintains information about prospects, builds statistical information, and allows for the creation of materials sent to prospects.
  
- J.** 13. Displays term-specific tuition, housing, meal plan, and fee charges, and calculates exemptions and contracts for eligible students; payments are entered here.
  
- H.** 14. Allows you to modify current student information and enter information on career choice, advisor, and veteran information.
  
- O.** 15. Maintains information used in telephone registration processing and electronic admissions processing.