Faculty & Advisor Banner Self-Service Guide

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Section A: Introduction

Lesson: Overview

User guide goal

The goal of this user guide is to provide UT-Rio Grande Valley Faculty and Staff step-by-step instructions on how to perform their duties on the Banner Student Information System.

Intended audience

UT-Rio Grande Valley Faculty and Staff

Section B: Set Up Lesson: Access and Responsibilities

Your Access

As a general principle of access, the UTRGV data (regardless of who collects or maintains it) will be shared among those employees whose work can be done more effectively by knowledge of such information. Although UTRGV must protect the security and confidentiality of data, the procedures allowing access to data must not improperly interfere with the efficient conduct on UTRGV business.

Access to the Student Information System (SIS) is based on a user's job role and responsibilities. Web for Students and Web for Faculty and Advisors permit some update capabilities defined in a user's college, department, and instructional assignments.

Your Responsibility

By law, certain data is confidential and may not be released without proper authorization. Users must adhere to any applicable federal and state laws, UT System regulations, and UTRGV policies and procedures concerning storage, retention, use release and destruction of data.

Generally, student records are protected by the Family Rights and Privacy Act of 1974 (FERPA). Access to these records is restricted to those with an "educational need to know" or those who have the express consent of the student. This protection does not expire when a student leaves the University. In addition, FERPA allows for certain information to be defined as *Directory Information*. This information may be publicly released, unless the student requests nondisclosure through the Office of the Registrar. *Directory Information* is outlined in the current UTRGV graduate and undergraduate catalogs. Additionally, UT System Business process memorandum (BPM 66) protects the use of social security numbers

Section C: Day-To-Day Operations Lesson: Accessing Faculty Self-Service

To access the Banner Faculty Self-Service as an authenticated user, you must successfully login using your **User ID** and **Password**.

Step	Action		
1	Access ASSIST using the following link: https://my.utrgv.edu		
	This page will appear:		
	 D Teger Arguest Strate Control Contrective Control Control Control Control Control Control Contro		
	mu		
	Sign in with your UTRGV Account V LTT General Sign in with your UTRGV Account General Sign in with your UTRGV Account		
	Welcome 🗤 🖬 🖌 f in		
	Important Dates		
	Academic Calendar > Account Access FMD >		
	Admission Deadlines > Apply to UTIKOV >		
2			
2	Enter your <mark>UTRGV assigned username and password</mark> .		
3	Select <mark>Sign In</mark>		
-			
4	Select ASSIST from the Applications section.		
5	You are IN!		
	Image: The symptotic control of the set of		
	UTRGV The University of texas the cranade utility		
	Personal Information, Studied Services, Jacobian Advisors, Admissions, UTICC Services, Floated Adv.		
	Automiuit site war war out		
	Wolcome, DeBorak A. Olichrat, Is the UTRGV ASSIST System Last web access on Jan 11, 2016 at 01:19 pm Personal Information		
	Structure 5 structures Reports from record and formation of mean and an Faculty and Advinces Beer from an effective Coase Like and Estated Subsets		
	Admission Stabus Anatomic Real Admission Without Annual Financial Ad		
	MELFARE: 8-7 © 2016 Elliscian Company L.P. and Ris affiliates.		
	\$10% ·		

Lesson: Accessing Faculty Self-Service – Your Personal Information

Step	Action		
1	Log into Self-Service using instructions from Lesson: Accessing Faculty Self-Service		
2	Click on the Personal Information tab or link.		
	Personal Information Student Services Faculty and Advisors Admissions UTPA Services Financial Aid		
	Personal Information		
	Request a Parking Permit, Reserve an Orientation Date or Complete a Survey View Addresses and Phones Update Addresses View E-mail Addresses View Emergency Contacts Update Emergency Contacts Update Emergency Contacts Name Change Information Social Security Number Change Information RELEASE: 8.3		
3	Choose an option from the Personal Information Menu Return TO MENU SITE MAP HEL Personal Information		
	Parking Permits, Emergency Loans and Surveys View Addresses and Phones Update Addresses and Phones View E-mail Addresses Update E-mail Addresses Update Emergency Contacts Update Emergency Contacts Name Change Information Social Security Number Change Information RELEASE: 7.3		

Lesson: Updating Addresses and Phone Numbers

Step	Action
1	Log into Self-Service
2	Click on the Personal Information Tab
3	Click on Update Addresses and Phones
4	Select which type of information you'd like to update using the Type of Address down
	arrow and click Submit

		Update Addresses and Phones - Select Address				
		 Update an existing address by selecting the link next to the corresponding address. Insert a new address by choosing the address type from the list and selecting Submit. Entering overlapping dates may change the effective dates on existing address records. 				
		Change of address information and USPS forms are available through this link.				
		Addresses and Phones Mailing Phones Current: Oct 11, 2007 to (No end date) Primary: None Provided 5613 El Sauz Mailing: 956-7813391 Edinburg, Texas 78539				
		Permanent Phones Current: Oct 11, 2007 to (No end date) Primary: None Provided 5613 El Sauz Permanent: 956-7813391 Edinburg, Texas 78539				
		Type of Address to Insert: Select Select Select Submit Parents Permanent				
5		the Dates you wish to start and all applicable information on the provided fields ick Submit.				
		ate Addresses and Phones - Update/Insert				
	Required fields on address update or insert are Valid From This Date, Address Line 1, City, State or Province, and ZIP or Postal Code; all other fields are optional. If Nation is entered, only Address Line 1 and City are required. Wh en updating an address you do not need to change the Valid From This Date value.					
	Valid Fi	manent d From This Date: MM/DD/YYYY				
		S Line 1:				
	Addres City:	Line 3:				
		Province: Not Applicable				
	County Nation:					
	Area Co Phone I	Code:				
		Phone Number: OR International Access Code and Phone Number:				
		d in Web Directory:				
	Phone ⁻	Type Area Phone Ext. International Unlisted Delete Code Number Access Code and Phone Number				
	Select Select					
	Select					
	Select Select					
	Submit	Reset				
		Select a Different Address to Update				
	RELEAS	[View Addresses and Phones]				
6		ill be able to view the updated information.				

Lesson: Updating Email Addresses

Step	Action			
1	Log into Self-Service			
2	Click on the Personal Information Tab			
3	Click on Update E-mail Addresses			
4	Select which email type you'd like to update using the Type of Email down arrow and click on the Submit button.			
	Update E-mail Addresses - Select Address			
	E-mail Addresses Business Iamares@utpa.edu			
	Type of E-mail to Insert: Select Submit Select Business Personal Primary email address UTPA Assigned Email UTPA Assigned Email [View E-mail Addresses]			
5	Enter your new information and Click the Submit Button. Update E-mail Addresses - Update/Insert			
	only one preferred e-mail address. Personal E-mail: Comment: Delete this address: Preferred cannot be displayed			
	Submit Reset Select a Different E-mail Address to Update [View E-mail Addresses]			
6	The Update E-Mail Addresses page will appear with the new information.			

Lesson: Updating Emergency Contacts

Step	Action
1	Log into Self-Service
2	Click on the Personal Information Tab
3	Click on Update Emergency Contacts
4	Click on New Contact

		Update Emergency Contacts
		Update a contact by selecting that contact and making the necessary cha
		Emergency Contacts Order Name Address and Phone Relationship 1 New Contact [View Emergency Contacts] RELEASE: 7.3
5	Enter information on t	he Update page then click on Submit Changes
5		Ipdate Emergency Contacts
	•	Enter a new emergency contact. When finished, Submit Changes.
	O R Fi M L C A A C C S S S S S S S S S S S S S S S	emove Contact: rder: plationship: Not Applicable rst Name: didle Initial: didress Line 1: didress Line 2: didress Line 3: rty: rate or Province: Not Applicable rea Code: Phone Number: Extension:
6	The Update Emergence	y Contacts page will appear with your new information.
	Update Eme	ergency Contacts et by selecting that contact and making the necessary changes. ets Address and Phone Relationship ontacts 956 5551234
	Order Name 1 Testing My C	Address and Phone Relationship

The following is a list of options under the Faculty and Advisor Tab.

Faculty and Advisors	
Student Information Menu	
Term Selection	
CRN Selection	
Faculty Detail Schedule	
Week at a Glance	
Detail Class List	
Summary Class List (Online Grading Tutorial)	
Final Grades	
Ungraded Courses	
Assignment History	
Class Schedule	
Course Catalog	
Office Hours	
Early Warning System	
ELEASE: 8.3	

Lesson: Viewing Faculty Detail Schedule

	Action	
Log into Self-Service		
Click the Faculty and Ad	visor tab	
Click on Faculty Detail S	chedule	
The Select Term page ap	opears	
Select the desired term using the drop-down list		
	Select Term	
	Select a Term: Fall 2008 V	
l	Submit	
Click Submit		
The Faculty Detail Schedule page appears. Use the scroll bar on the right to view all		
courses.		
	Log into Self-Service Click the Faculty and Ad Click on Faculty Detail S The Select Term page an Select the desired term Click Submit The Faculty Detail Sched	

Intermediate Acct III - 10027	- ACC 3329 - 01		
Status:		Active	
Available for Registration:		Feb 01, 2008 - Dec 11, 2008	
College:		Business Administration	
Department:		Accounting and Business Law	
Part of Term:		1	
Course Credits:		3.000	
Course Levels:		Undergraduate	
Campus:		Main	
Override:		No	
Syllabus:		Maintain	
Rosters:		Classlist	
Office Hours:		Add	
Enrollment Counts			
Maximum Actual R	emaining		
Enrollment: 40 0 4			
Cross List: 0 0 0			
Scheduled Meeting Times			

Lesson: Week at a Glance

S tep	Action		
1	Log into Self-Service		
2	Click the Faculty and Advisor tab		
3	Click on Week at a Glance		
	The Week at a Glance page appears. Use the scroll bar to view complete data		
	Go to (MM/DD/YYYY): Submit		
(Previous Week Week of Aug 25, 2008 (1 of 16)		
	Monday Tuesday Wednesday Thursday Friday Saturday Sunday 11am		
	ACC 3329- 12pm ACC 3329-01 ACC 112pm ACC 3329-01 ACC 10027 Class 3329-01 10027 11:45 am- Class 12:35 pm Class 11:45 am- 12:35 pm TBA 11:45 12:35 pm TBA TBA 11:45 12:35 pm TBA TBA		
	1pm		
	2pm		
	Done Quinternet		
4	To view the Previous Week or Next Week of a semester, click Previous Week or Next		
	Week (circled in red).		
	The Week at a Glance page appears.		
5	To view a Specific Week in a semester, complete the Go To (MM/DD/YYYY) field. 🛛 🖈		

	The Week at a Glance page appears.
6	After viewing the Week at a Glance page, click Return to Menu in the upper-right hand
	corner of the screen to return to the Faculty and Advisors Menu

Lesson: Viewing a Detailed Class List

Step	Action	
1	Log into Self-Service	
2	Click the Faculty and Advisor tab	
3	Click on Detail Class List	
	The Select CRN page appears	
4	Select the CRN (course) from the drop-down list	
	Select a CRN	
	CRN: Intermediate Acct III - 10027 Intermediate Acct III - 10027 Principles of Accounting - 10032	
5	Click Submit	
-	The Detail Class List appears	
	Detail Class List	
	 An asterisk will appear next to the appropriate field if any of the following conditions exist: 1) The department in his/her primary or secondary curriculum. 2) The student has a program, level, colle curriculum that is different from that in his/her primary curriculum. If the word Confidential appears next to a student's name, the personal information is to be kept content of the curriculate Acct III - ACC 3329 01 CRN: 10027 Duration: Aug 25, 2008 - Dec 11, 2008 Status: Active 	ege, or degree in the secondary Special note
	Enrollment Counts	programs for all
	Maximum Actual Remaining Enrollment: 40 1 39	students in the course
	Enrollment: 40 1 39 Cross List: 0 0 0	will be listed.
	Detail Class List	will be listed.
	Record Student Name ID Registration Status Registration Number	
	1 SampleA, Anna 20006804 Registered 1 Current Program Bachelor of Arts Level: Undergraduate Program: BA in Communication Admit Type: Standard Catalog Term: Fall 2008 College: Arts and Humanities Major and Department: Communications, Communications Class: Freshman Credits: 3.000	
6	After viewing the Detail Class List page, click Return corner of the screen to return to the Faculty and A	· · · –

Lesson: Viewing the Summary Class List and Sending a Class Email

Step	Action
1	Log into Self-Service

2	Click the Faculty and Advisor tab		
3	Click on Summary Class List		
	The Select a term page appears		
4	Select a CRN using the drop-down list		
	RN: Intermediate Acct III - 10027 Y Intermediate Acct III - 10027 Submit Principles of Accounting - 10032		
5	Select course and click Submit		
	The Summary Class List page appears		
Summary Class List			
	Mar 18 An asterisk will appear next to the appropriate field if any of the following conditions exist: 1) The student has more the department in his/her primary or secondary curriculum. 2) The student has a program, level, college, or degree in the securiculum that is different from that in his/her primary curriculum. If the word Confidential appears next to a student's name, the personal information is to be kept confidential. Course Information Intermediate Acct III - ACC 3329 01 CRN: 10027 Duration: Aug 25, 2008 - Dec 11, 2008 Status: Active Enrollment Counts Maximum Actual Remaining Enrollment: 40 2 38 Cross List: 0 0 0		
	Summary Class List		
	Record Student Name ID Reg Status Level Credits Final Grade Number		
	1 SampleA, Anna 🔶 20006804 Registered Undergraduate 3.000 Enter		
	2 SampleB, Bobby Confidential 20006805 Registered Undergraduate 3.000 Enter		
 To E-mail a student, click the e-mail icon next to their name To E-mail the entire class, click the e-mail icon at the bottom of the page 			
	Record Student Name ID Reg Status Level Credits Final Grade Detail		
	Number 20006804 Registered Undergraduate 3.000 Enter Color		
	2 SampleB, Bobby Confidential 20006805 Registered Undergraduate 3.000 Enter		
	Email class @		
	Paturo to Dravious		
7	To view student information, click on the student name.		
	Their address and phone information will appear		

	View Student A	ddresses and Phones	10186233 Linda Arellano Mar 18, 2008 08:32 pm	
	Information for Anna Sar	npleA		
	Addresses and Phones			
	Permanent	Phones		
	Current: Mar 18, 2008 - († 1 Street Edinburg, Texas	Io end date) Primary: 956-5551234 78540		
	[Student Information S	tudent E-mail Address Class List	Wait List Mid-Term Grades Final Grades Registration Overrides	
8	After viewing the	Class Summary page,	click Return to Menu in the upper-right h	and
	corner of the scree	en to return to the Fa	aculty and Advisors Menu	

Lesson: Looking up Courses by CRN

Step	Action	
1	Log into Self-Service	
2	Click on Faculty and Advisors tab	
3	Click on CRN Selection	
4	Select a Term and click Submit	
5	Click on Enter CRN Directly	
	Select a CRN	
	You have no assigned sections for this term.	
	ELEASE: 7.3	
6	Enter the CRN (course reference number) to the course you need and click Submit	
	Enter CRN Directly	
	CRN:	
	Submit	
	[Select Assigned CRN]	
	You will be redirected to the Faculty and Advisor menu	
7	Select either Detail Class List or Summary Class list to view selected course	

Lesson: Viewing and Searching the Course Catalog

The course catalog is a general source guide which only provides course descriptions.

Step	Action
1	Log into Self-Service
2	Click on the Faculty and Advisors tab
3	Click on Course Catalog to view Catalog Term page
4	Select desired term in Search by Term drop down list
5	Click Submit
	The Course Catalog page appears

6	In the Subject, Title, Level, Schedule Type, College, and Department fields, select or
	enter the desired search information
	YOU DO NOT HAVE TO ENTER EVERY FIELD
7	Click Get Courses
	The Catalog Entries page appears
8	On the Catalog Entries page, click the Course Entry to view course details.
9	After viewing course details, click on Site Map in the upper-right side of screen to
	return to the Faculty and Advisors Menu

Lesson: Viewing and Searching the Class Schedule

The Course Schedule is different than the Course Catalog in that the Schedule, as a semester course offering guide, provides information for courses offered.

Step	Action	
1	Log into Self-Service	
2	Click on the Faculty and Advisors tab	
3	Click on Class Schedule to view Class Schedule Search page	
4	Select desired term in Search by Term drop down list	
5	Click Submit	
	The Class Schedule Search page appears	
6	In the Subject, Course Number, Title, Campus, Course Level or Instructor fields, select	
	or enter the desired search information.	
	YOU DO NOT HAVE TO ENTER EVERY FIELD	
7	Click Class Search	
	The Class Search Listing page appears	
8	On Class Schedule page, click the Section Found to view class details.	
9	After viewing class details, click Site Map in the upper right-hand corner of the screen	
	to return to the Faculty and Advisors Menu	

Lesson: Attendance Verification

Attendance verification is very important to both our students and the Institution. Institutions of Higher Education that disburse Title IV Aid (i.e. Pell, Loans, TEACH, Perkins, etc.) must verify attendance. If a student is reported as not attending, we are required to return the disbursed funds to the appropriate program even if those funds were directly disbursed to the student **no later than 30 days after the census date.**

Completing the attendance verification is only the first step in the process. The reports must be reviewed and refunds processed so it is imperative that verification is complete when requested.

Please log in to ASSIST and follow these steps:

- 1. Click on "Faculty and Advisors"
- 2. Click on "Attendance Verification"
- 3. Choose the appropriate term from the menu

- 4. Choose the class from the menu and click "submit"
- 5. Check the box for the students who have NOT attended ANY class sessions. (For online courses, check the box for students who have not participated in the course.)
- 6. Click "Submit Attendance Verification"
- 7. To verify attendance in other courses, click the "Attendance Verification CRN Selection" link at the bottom of the screen.
- 8. Repeat steps 4-6.