Prerequisite & Capacity Override Banner Manual

V1.1



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Section A: Introduction

_esson: Overview

Manual goal

This manual is created to help staff with override access to efficiently and successfully locate a course and complete an override process for a student.

Intended audience

Any staff or faculty member who has been granted (by their college chair or dean) override access in Banner.



Section B: Set Up

Lesson: Overview

Your Access

As a general principle of access, the UTPA 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 UTPA must protect the security and confidentiality of data, the procedures allowing access to data must not improperly interfere with the efficient conduct on UTPA business.

Access to the Student Information System (SIS) is based on a user's job role and responsibilities. Generally access is <u>inquiry</u> only, with the exception of some self service applications (Web for Students and Web for Faculty and Advisors) which permit some update capabilities defined in a user's college, department, and instructional assignments. For those forms that you do have update access, your username, and in most cases, the date the form was updated, will be recorded when a change is made.



You're 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 UTPA 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 UTPA graduate and undergraduate catalogs. Additionally, UT System Business process memorandum (BPM 66) protects the use of social security numbers.



Section B: Set Up

Lesson: Overview (Continued)

All institutional data, whether maintained in the central database or copied into other data systems (e.g. personal computers) remains the property of UTPA. Access to data is not approved for use outside of user's official UTPA responsibility. Data will be used only for legitimate University business. Information is not to be distributed beyond a users' office without authorization by the appropriate administrator or supervisor. Distribution beyond the University requires permission of the corresponding data custodians(s). Sensitive information which resides on desktop or portable machines should be encrypted or password protected to prevent distribution by unauthorized persons.

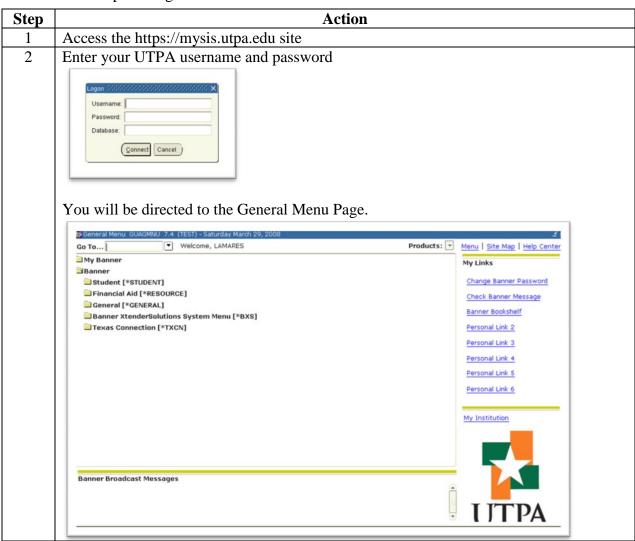
Users must also protect all UTPA data from unauthorized use, disclosure, alteration, or destruction. Users are responsible for the security, privacy and management of data within their control. Users are responsible for all transactions occurring under their SIS account. **Users are not to loan or share their account with anyone.** If it is found that a user is loaning or sharing the access codes, or has inappropriately updated or accessed information stored on the Student Information System, the user is subject to disciplinary action including revocation of SIS privileges and/or termination.



Lesson: How to Log in

Procedure

Follow these steps to Log into Banner



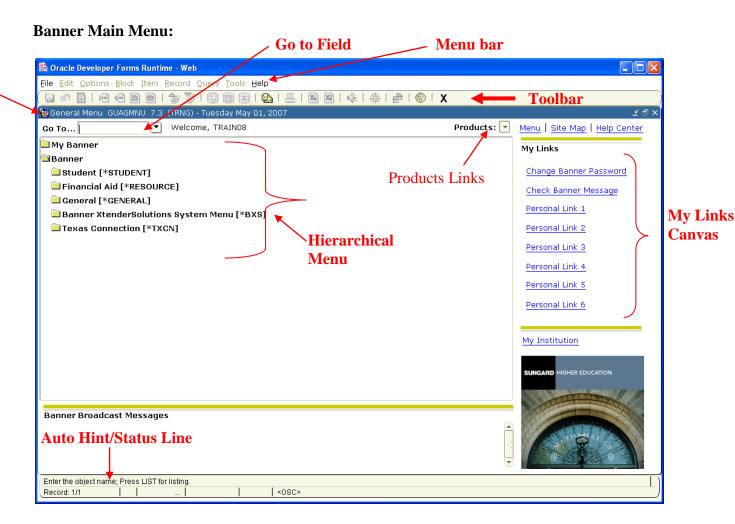


Title

Bar

Section B: Banner Forms

Lesson: Banner Main Menu



The Main Menu provides an overview of the menus, forms, jobs, and QuickFlows. You use the main menu to navigate through Banner.



Lesson: Banner Main Menu (Continued)

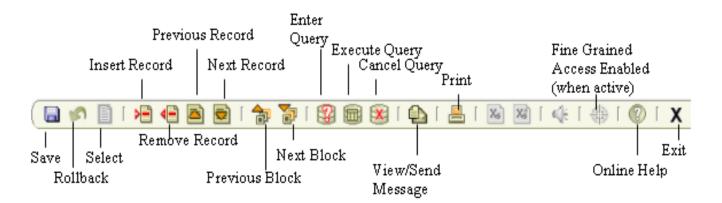
Part description:

The following chart details the different areas of the main menu.

Menu Part	Description
Menu bar	Offers a variety of options for navigating within Banner. However, from the
	main menu, the options are limited
Toolbar	Set of icons that represent shortcuts for performing common functions from
	the main menu.
Title bar	May display the form's descriptive name, the 7 character ID name, the
	software version number and the database name.
Go to Field	Access a form if you know the 7 character code of the form you wish to
	access.
Products Links	Access contents of various Banner products directly.
Hierarchical menu	Access forms through the main menu hierarchical tree structure.
Auto Hint/Status	Describes the field where the cursor is located.
Line	Displays error and processing messages.
	Explains the purpose of the field, what can be done next, or how to access
	another window or form.
Links Canvas	The Change Banner Password link goes to the Oracle Password Change
	Form (GUAPSWD), where you can change your password.
	The Check Banner message link takes you the Banner Message Form
	(GUAMESG), where you can view your messages. A green check mark
	appears next to the link when you initially log in and have pending
	messages, or whenever a new message arrives. The pop-up alert for new
	messages is no longer displayed.
	Personal links enable you to create up to 6 links to favorite URLs or often-
	used Banner objects.



Lesson: Toolbar Icons



Function	lcon	Key Stroke	Function	lcon	Key Stroke
Save		F10	Next Block	6	Ctrl Pg Qn
Rollback	5	Shift F7	Enter Query	$oldsymbol{v}$	F7
Select		Shift F3	Execute Query		F8
Insert Record	} ≣	F6	Cancel Query	X	Ctrl Q
Remove Record	4曹	Shift F6	Print		Shift F8
Previous Record	叁	Up Arrow or Page Up	Online Help	?	
Next Record	$\overline{\mathbf{z}}$	Down Arrow or Page Down	Exit	Х	Ctrl Q Alt F4
Previous Block		Ctrl Pg Up	Search	•	F9

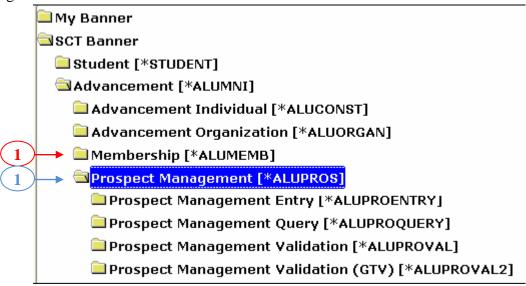


_esson: Hierarchical Menu

Introduction

When accessing Forms from the Main Menu they are displayed as a <u>hierarchy</u>. You can expand and collapse content by clicking on the folders.

Screen image



1	Closed Folder	Select the closed folder to expand and view items contained under it.
2	Open Folder	Select the open folder sign to collapse the menu into the original item.



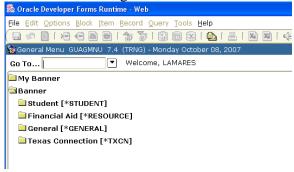
Lesson: Accessing Forms

The most common ways to access forms are:

- 1. Hierarchical menu
- 2. Go To field
- 3. Options Menu
- 4. List of forms accessed during current Banner Session stored in the File Menu.
- 5. Site map

• Hierarchical menu

Access forms using the Hierarchical Tree menu on General Menu form:



• Go To field

Forms can be accessed via the **Go To** field, if you know the seven-character code you wish to access. You can also use the up and down arrow keys in the **Go To** field to access forms you have previously opened during your current Banner session.



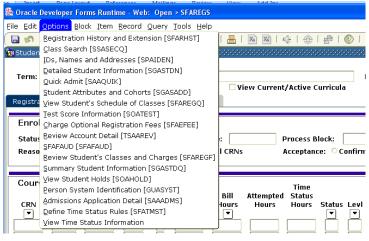




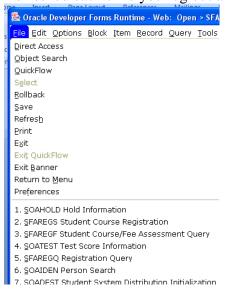
Lesson: Accessing Forms (Continued)

Options Menu

Most Banner forms list related forms which can be accessed using the Options Menu.



• List of forms accessed during <u>current</u> Banner Session stored in the File Menu. Banner retains a list of forms accessed in the File Menu. You may quickly access these forms by clicking on the File menu and choosing the form from the list. This list is refreshed each time you log out and log back into Banner.

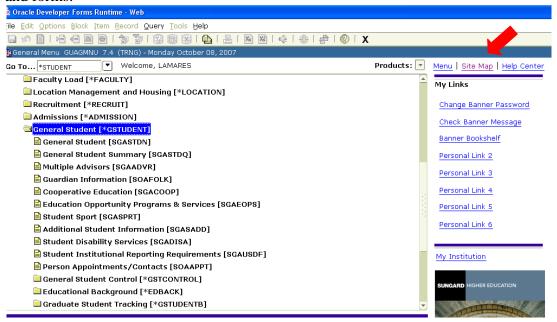


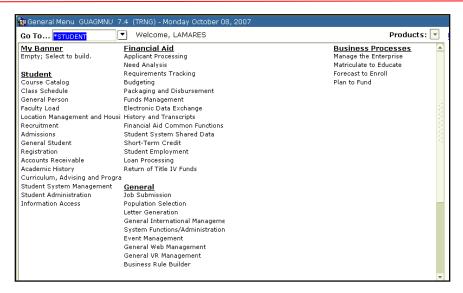


Lesson: Accessing Forms (Continued)

• Site Map

The site map is accessible by selecting the Site Map from the Main Menu. It will list top-level menus and one level below them. No fields are listed, just links to various menus and forms.







Lesson: Blocks

All Banner forms are made up of three components: Blocks, Fields, and Records.

Blocks:

A block is a section of a form or window that contains related information. If a form or window contains more than one block, each block (except the key block) may be enclosed in a beveled box.

Types of Blocks

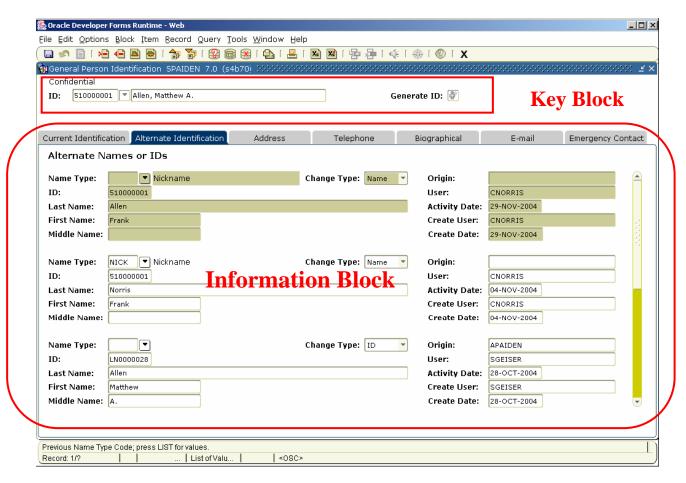
There are two types of blocks; a Key Block and an Information Block.

Part of Form	Description
Key Block	Where you typically start on a form.
	Most forms have a Key Block.
	A unique code is entered such as an ID number, term code or document
	number.
	Lets Banner know what piece of information you want to retrieve.
	The rest of the information on the form will refer to the information that
	you enter on the Key Block.
Information Block	Section that contains related information to what was entered in the Key
	Block.
	A line may separate each Information Block on the form.



Lesson: Blocks (Continued)

Screen Image



Navigating blocks

To naviate in between blocks or tabs, use the **Next Block** or **Previous Block** functions. There are icons located on the toolbar in a form.

Next Block (or Ctrl-Page Down)

Previous Block (or Ctrl-Page Up)







Lesson: Fields

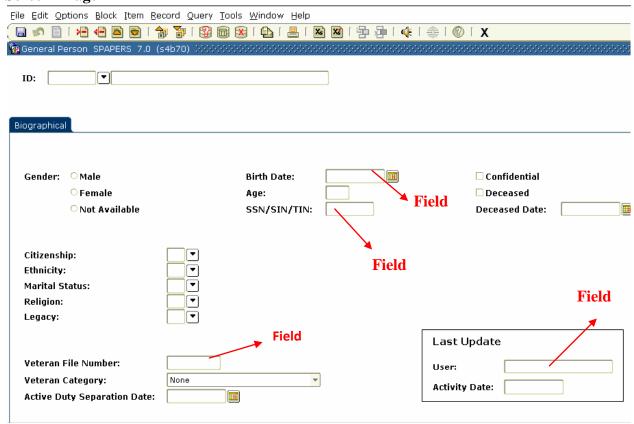
Fields

Fields are labeled space with a block. You can Enter, Query, Change and/or Display specific information within a field.



There is usually more than one field on a form:

Screen Image





Lesson: Records

Records

A record is a group of fields that make up a logical unit. There may be more than one record in a block.

<u>Example:</u> A person record is made up of several fields: ID, Last name, First name, Middle name, Birth date, Change indicator, Type.

Screen Image

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Туре
A00020654	Allen	Bancroft				
A00020655	Allen	Elise		03-MAR-1983		
311115555	Allen	Frank		29-JUN-1977	N	NICK
311116666	Allen	Frank		27-APR-1962	N	NICK
5100000C1	Allen	Frank		11-JUL-1939	N	NICK
A00020656	Allen	Harold		10-OCT-1985		
5100000C3	Allen	Kathleen	Evans	17-JAN-1991		
A00000061	Allen	Marissa	В	07-DEC-1982	Ī	
510000000	Allen	Mary		10-JUL-1951	N	
444555555	Allen	Matthew	Α.	11-JUL-1939	I	

Record Counter

The record counter displays number of records viewed and the number of total records.

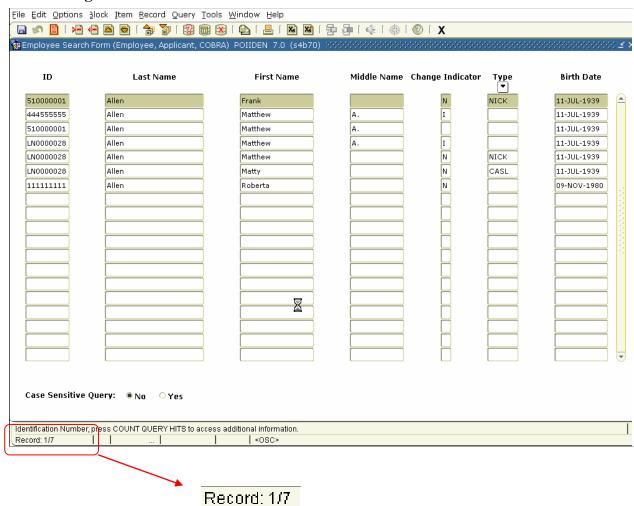
Note: A question mark (?) is the status line signifies that there are more records, but you haven't gotten to the last one, so the computer doesn't know how many there are yet.

Record: 8/?



Lesson: Records (Continued)

Screen Image

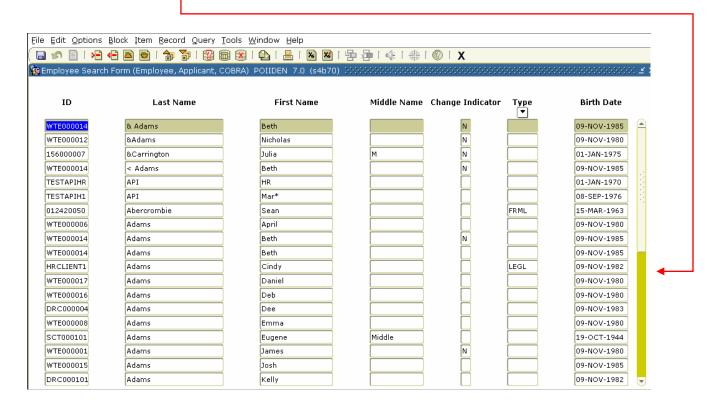




Lesson: Records (Continued)

Viewing Records

Some forms have a **scroll bar** to view existing records.



Navigating records: You can navigate to different records in 3 ways.

1. Use the Next Record or Previous Record functions located on the toolbar in a form.







3. Use the keys on the keyboard to navigate through records.

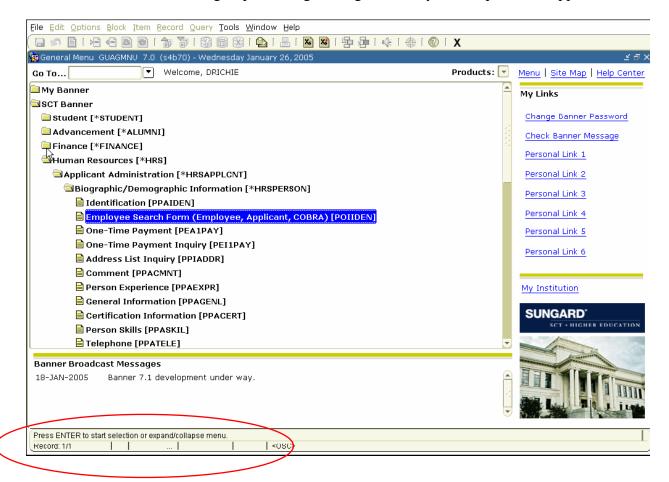
Function	Command
Next Record	Down-arrow
Previous Record	Up-Arrow



Lesson: Auto Hint

Introduction

The Auto Hint/Status Line appears at the bottom of the screen. It describes the place where the cursor is located. Error messages, processing messages, and keyboard equivalents appear here.





Lesson: Wild Cards

Searching for items in a database:

A wildcard is a special character that represents one or more other characters. Use wildcard symbols % and _ in the search criteria.

- % (percent sign) represents any number of characters
- _ (underscore) represents one occurrence of a character

Note: *ma* is used as an example. The wildcard symbols can be used with any combination of latter in any order.

To get these results	Enter these criteria
All entries that CONTAIN ma	% <u>ma</u> %
All entries that BEGIN with <i>ma</i>	<i>ma</i> %
All entries that END with <i>ma</i>	% <u>ma</u>
All entries that have <i>m</i> as a second	_ <mark>m</mark> %
character	



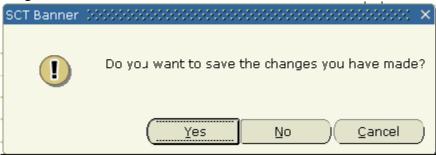
Lesson: Dialog and Alert Boxes

Pop-up boxes are windows that appear on your screen for a specific purpose. All popup boxes require that you take action before continuing on the form.

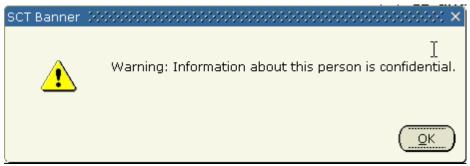
There are two types of Pop-up boxes.

- Dialog Box
- Alert Box

A <u>dialog box</u> appears when you must chose from two or more responses. The following is an example of a dialog box.



An <u>alert box</u> notifies you of a condition that may impact data. The following is an example of an alert box.





Lesson: My Banner

<u>My Banner</u> appears at the top of the Main Menu. It allows quick access to forms, jobs, menus, and QuickFlows that are most important in your daily work.

Screen image



Setting up My Banner

The following forms are used to create, change or copy My Banner

GUAPMNU- Personal Menu Maintenance: Create and change your personal menu.

GUTPMNU-Personal Menu Maintenance Menu and Copy: Copy your personal menu to or from another user.

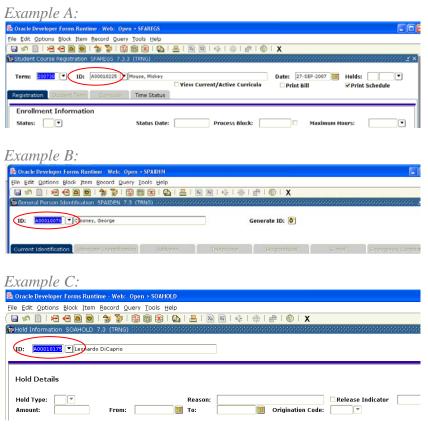


Lesson: Finding a Student in Banner

Purpose: To assist staff members in locating a student in Banner in an efficient and timely manner.

A student record can be obtained with almost any form used in the Office of the Registrar. There are 3 ways to obtain a student record:

1. Enter the Banner ID in the **ID** field and press **Enter** or **Tab** in the form you are working on.



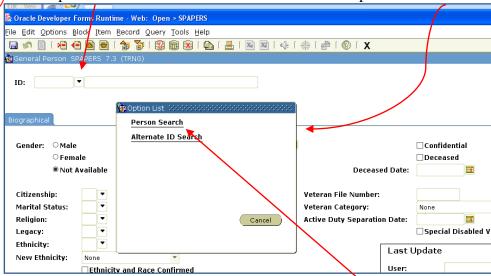
Note: Remember to insert the appropriate term code if applicable. Do not use social security numbers in the ID field.



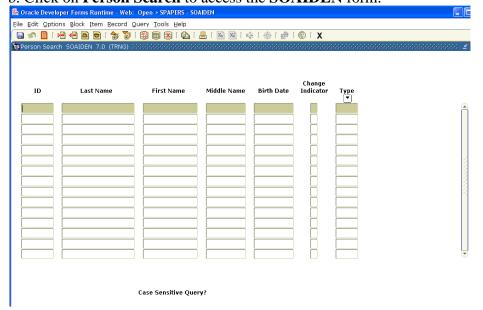
Lesson: Finding a Student in Banner (Continued)

⋖ Jump to TOC

2a. Use the pull-down menu in the **ID** field to access the Option List box.



b. Click on **Person Search** to access the **SOAIDEN** form.

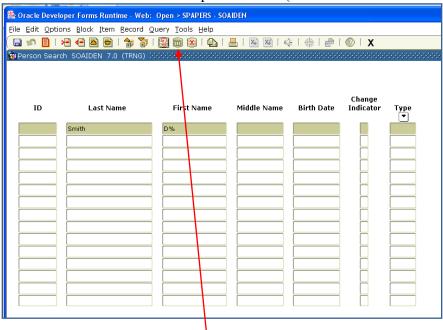




Lesson: Finding a Student in Banner (Continued)

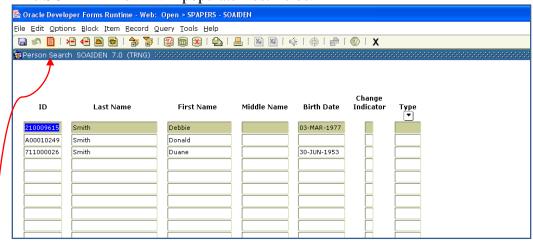
⋖ Jump to TOC

c. Enter all available student information in the **SOAIDEN** fields. Remember to use % for incomplete names. (See Wild Cards lessen in Section B)



d. Perform an Execute function.

The SOAIDEN form will populate most fields:



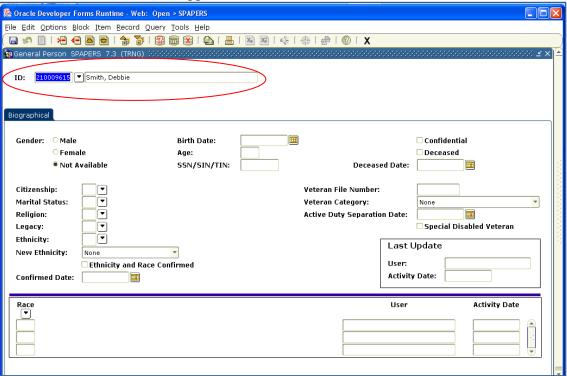
e. Place cursor on student ID and pick the student using the **Select** icon.



Lesson: Finding a Student in Banner (Continued)

⋖ Jump to TOC

f. Student Banner ID and name will appear on form.





Lesson: Finding a Student in Banner (Continued)

■ Jump to TOC

3.a. Enter a name in the **Name** field on a form and Tab. You can use the wildcard (%) options



Result: ID and Name Extended Search box will appear

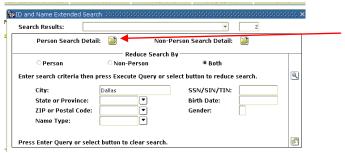


b. Enter fields available to reduce search.

Note:

- Enter SSN numbers with no hyphens: 111223333
- Enter birth dates in following format:

 Day-month-Year for example: 01-JAN-1980
- C Select the **Person Search Detail Icon.**



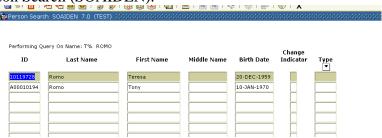


Lesson: Finding a Student in Banner

(Continued)

Jump to TOC

d. The Person Search (SOAIDEN).



e. Select the student desired using the Select icon.

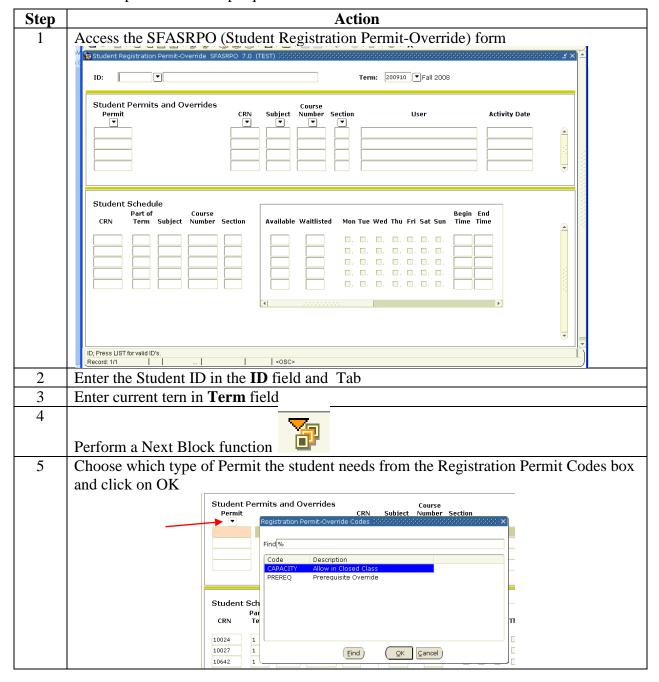


Lesson: Overriding a Prerequisite and/or Capacity

■ Jump to TOC

Procedure

Follow these steps to override a perquisite for a student

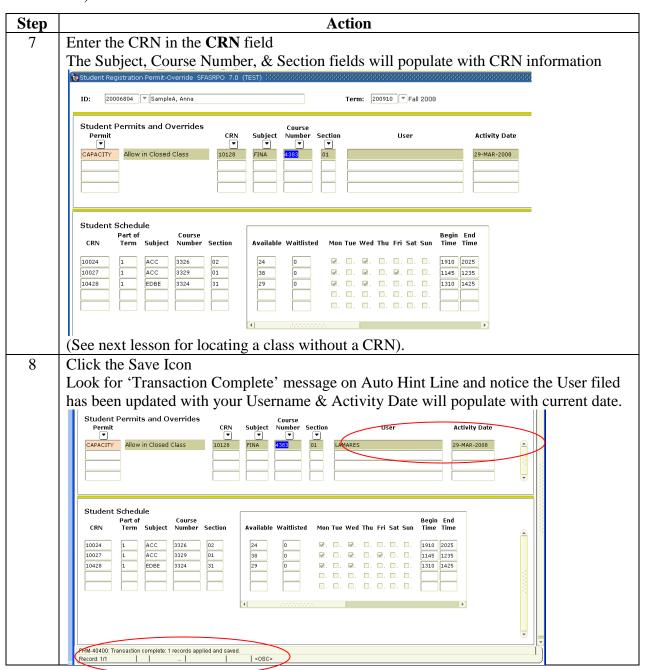




Lesson: Overriding a Prerequisite and/or Capacity (Continued)

Jump to TOC

Procedure, continued





Lesson: Overriding a Prerequisite and/or

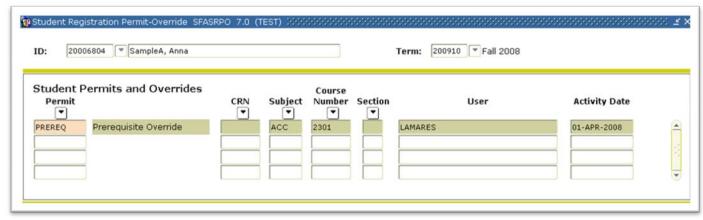
Capacity (Continued)

Jump to TOC

Note:

To enter a prerequisite override for a **Subject and Course**, enter the information on the Subject and Course fields and save.

This will allow a student to enter into any section of the subject and course number you have selected.



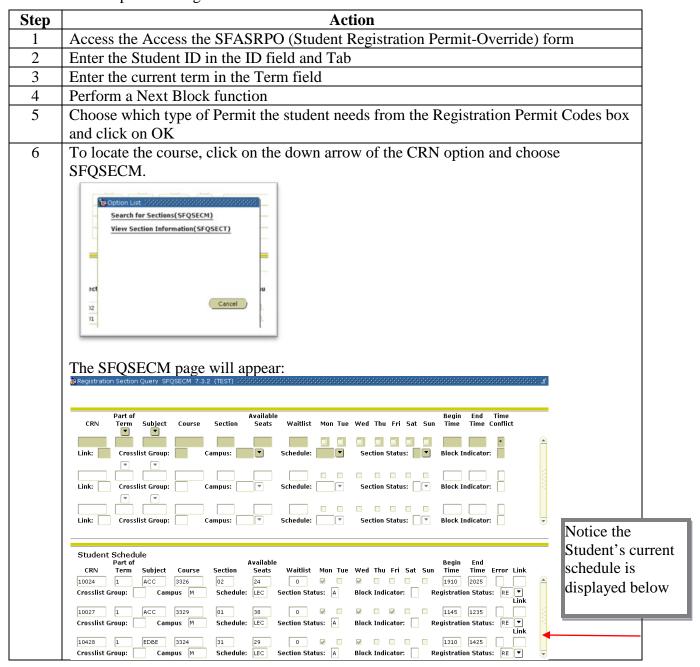


Lesson: Locating a Course Without a CRN

Jump to TO

Procedure

Follow these steps to finding a course without a CRN

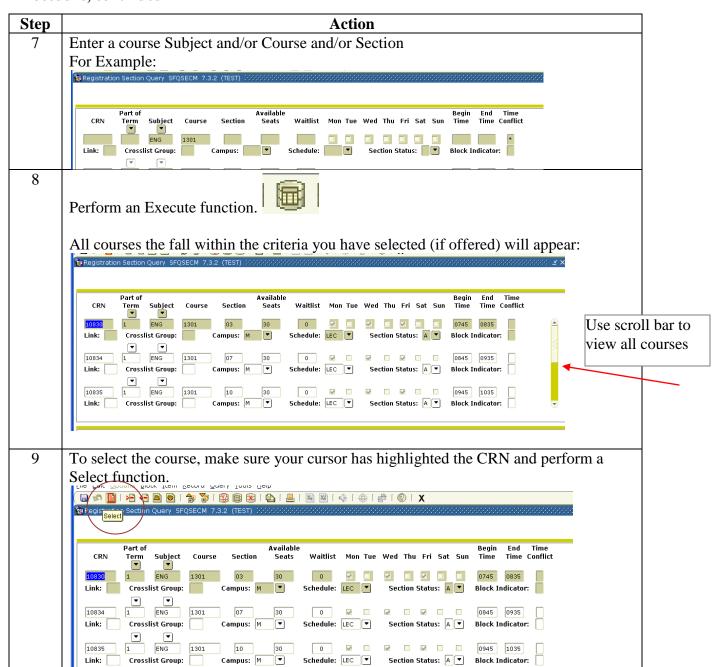




Lesson: Locating a Course Without a CRN (Continued)

Jump to TOC

Procedure, continued

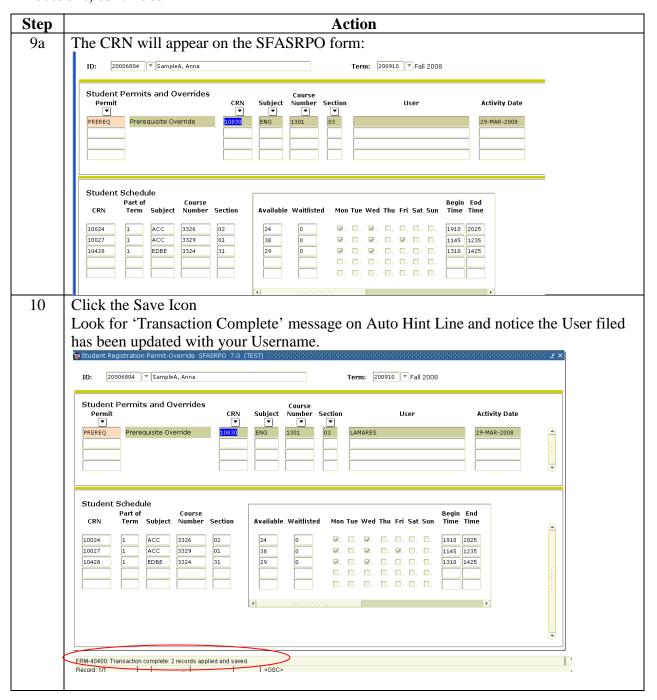




Lesson: Locating a Course Without a CRN (Continued)

Jump to TOC

Procedure, continued



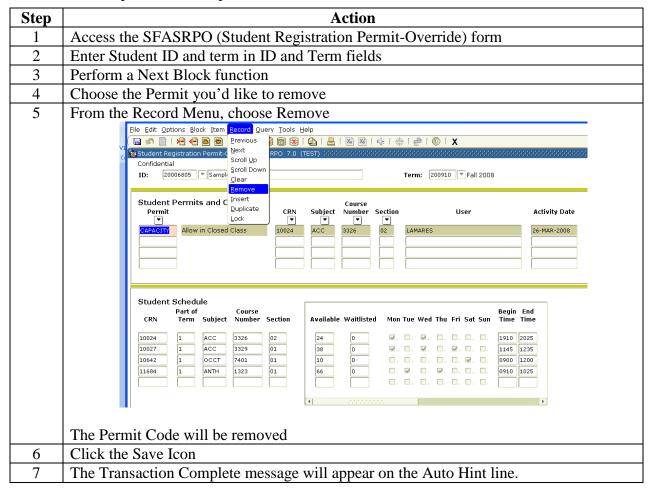


Lesson: Removing an Permit Override

⋖ Jump to TOC

Procedure

Follow these steps to remove a permit override



^{*}This will not remove a student from a course if they have already registered.



Section D: Contact Information

Lesson: Helpful Contacts

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