Academic History/Advising Training Manual

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Banner Student Quick Reference Card

Function	Keyboard Shortcut
Cancel Query	Ctrl + Q
Clear Block	Shift + F5
Clear Form	F5
Clear Record	Shift + F4
Delete Record	Shift + F6
Duplicate Record	F4
Execute Query	F8
Exit	Ctrl + Q
Export	Shift + F1
Help	Ctrl + Shift + L
Insert Record	F6
List of Values (LOV)	F9
Open Menu	Ctrl + M
Open Related Menu	Alt + Shift + R
Open Tools Menu	Alt + Shift + T
Next Block	Alt + Page Down
Next Field	Tab
Next Record	Down Arrow
Previous Block	Alt + Page Up
Previous Field	Shift + Tab
Previous Record	Up Arrow
Print	Ctrl + P
Recently Open Items	Ctrl + Y
Rollback/Clear Form	F5
Save (Commit)	F10
Select	Alt + S

Important Information

ITS Help Desk 75500

help@email.uncc.edu

Term Codes	
Spring	YYYY10
Summer I	YYYY50
Summer II	YYYY70
Fall	YYYY80

Passwords: You have signed a Confidentiality Agreement, which prohibits you from sharing your password or authorizing someone else to use it.

Student Records: You have signed a Confidentiality Agreement, which requires that you will use your authorized access to Records System information only in the performance of the responsibilities of your position as a University employee. Any other access is prohibited. *You are not authorized to access your own student record in Internet Native Banner.*

Student Information		Student Registration	
Form	**Purpose**	**Form**	**Purpose**
SOAIDEN	Searching for a Student	SFAREGQ	Class Schedule
SPAPERS	Biographical Information	SFASTCA	Registration Audit Trail
SPAIDEN	Address	SHACRSE	Course Summary
SPATELE	Telephone Information	SHATERM	Term Course History
GOAEMAL	E-mail Information	SHASUBJ	Subject History
SPAEMRG	Emergency Contact	SFASLST	Class List for a Section
SGASTDN	General Student Information	SSASECQ	Searching for a section
SGASTDQ	Summary of Student Information	SFASLST	Viewing a Class List for a Section
SGAADVR	Assigned Advisor	TSICSRV	Account Summary
SOAHOLD	View Student Holds	SPACMNT	Comments

| Records		Advising	
Form	**Purpose**	**Form**	**Purpose**
SPAIDEN	Address	SFASRPO	Registration Overrides
SGASTDN	General Student Information	SGASTDN	Academic Standing
SOAHOLD	View Student Holds	SHACRSE	Academic History
SGAADVR	Assigned Advisor	SOAPCOL	Prior Institution
SOAIDEN	Searching for a Student	SHATRNS	Transfer Course Info.
SPAEMRG	Emergency Contact	SOATEST	Test Score Information

Searching for a Student

A person search may be performed using any form that has the ID field in the Key Block, such as **SPAIDEN**, **SPAPERS**, **SGASTDN**, and **SGAADVR**. The **ellipses** next to the ID field, will take you to an additional form, which allows you to enter information to perform a search. A search can be performed using a partial name or UNC Charlotte ID.
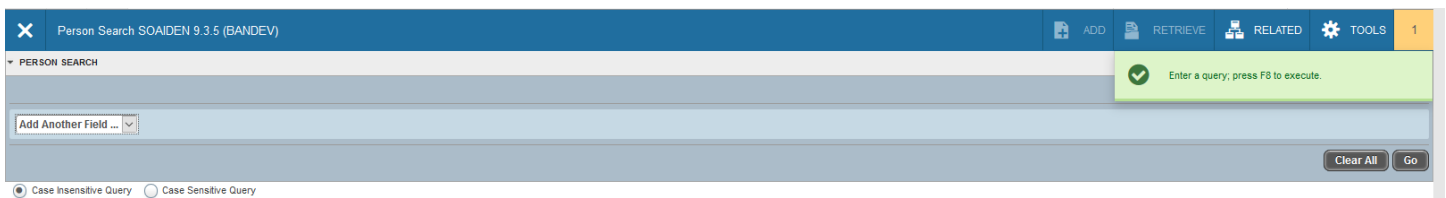
To initiate a search:

1. Click the **ellipses** next to the ID field to access the Person Search Form.

2. Click **Person Search** from the Options list.
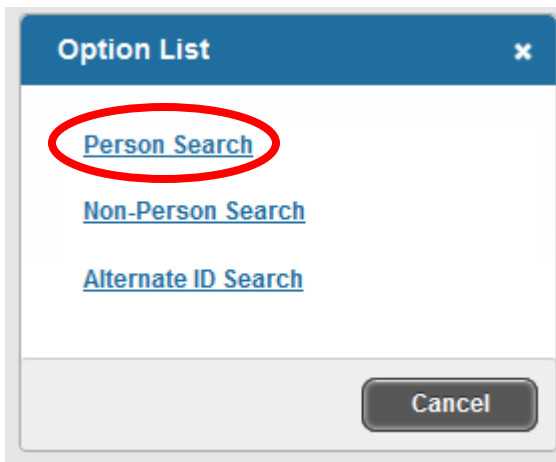
3. This will open the Person Search Filter (**SOAIDEN**).

Searching for a Student

Fields available for search are: ID, Last Name, First Name, Middle Name, Change Indicator and Name Type. The search comparison operator can be: Contains, Like, Starts With, Ends With, Equals and Not Equal. Wildcards can be included in the search.

Wildcards:

The wildcard **"%"** can represent any number of characters in the selected position.
- Querying "sm%h" would return Smith, Smooth, and Smertsworth, but not Smythe.
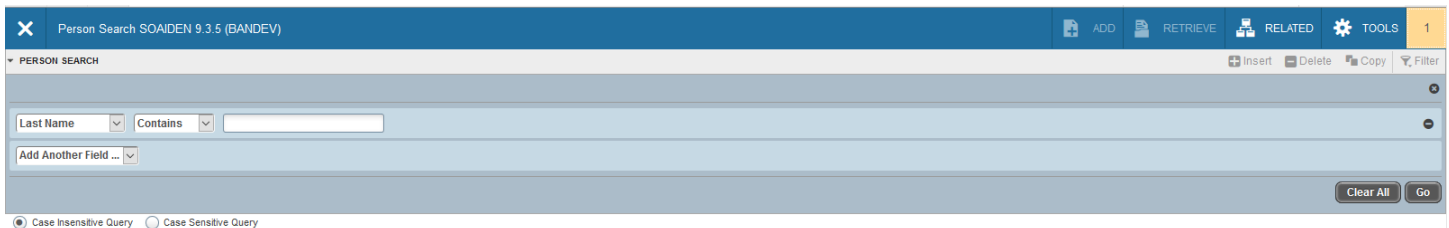
The wildcard **"_"** (underscore) represents a *single* character in the selected position.
- Querying "sm_th" would return Smith, but not Smooth.

To search using a last name:

1. Select the **Last Name** field on the Person Search Filter (**SOAIDEN**), enter the last name of the student.
2. Execute the query by clicking the **Go** (or press **F8**).
3. Double-click on the ID number of the student for whom you are searching.
4. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

To search using a partial last name:

1. Select the **Last Name** field on the Person Search Filter (**SOAIDEN**), enter the partial last name of the student.
2. You can use the wildcard **"%"** to represent the unknown characters, however, depending on the comparison operator used wildcards may not be needed.
   - Querying "Cov%" will search for all people with last names that start with "Cov".
   - Querying "Cov" with the Starts With operator will produce the same results.
3. Execute the query by clicking the **Go** (or press **F8**).
4. Double-click on the ID number of the student for whom you are searching.
5. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

Searching for a Student

To search using a partial UNC Charlotte ID:

1. Select the **ID** field on the Person Search Filter (**SOAIDEN**), enter the partial UNC Charlotte ID.

2. You can use the wildcard **"%"** to represent the unknown characters, however, depending on the comparison operator used wildcards may not be needed.

   - Use "80021%" to search for all UNC Charlotte IDs that start with "80021".

   - Use "80021" and the Start With operator will produce the same results.

3. Execute the query by clicking the **Go** (or press **F8**).

4. Double-click on the ID number of the student for whom you are searching.

5. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

Course Summary

1. Access the Course Summary page (**SHACRSE**) from the Welcome page.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
   - If you do not have the ID of the student, click the **Ellipses** to perform a query (see pages 5-6 for additional instructions on searching).
3. In the **Term** field, enter the term you wish to view.
   - For a list of all courses, leave the **Term** field blank.
4. Click **Go** (or **Alt + Page Down**) to display a course summary for the student.

   - Use **page controls** to move to each address record (or **Page Down** and **Page Up**).
   - In the **Grading Mode** field, the following codes may appear:

     S – Standard

     P – Pass/ No Credit

     A – Audit
   - To view detailed information for a specific course, click the **Detail** icon to the left of the course.
   - To return to the **SHACRSE** page, click **X** (or **Ctrl + Q**).

5. To view another student, click **Start Over** (or **F5**) and repeat steps 2-4.
6. To return to the **Welcome** page, click **X** (or **Ctrl + Q**).

To query specific information:

1. Perform steps 1 through 4.
2. Click **Filter**.
3. Select Fields to query and enter selection criteria. (Term, CRN, Subject, etc)
4. Click **Go** (or **F8**).

Term Sequence Course History

1. Access the Term Sequence Course History page (**SHATERM**) from the Welcome page.

2. In the **ID** field, enter the UNC Charlotte ID of the student.
   - If you do not have the ID of the student, click the **Ellipses** to perform a query (see pages 5-6 for additional instructions).

3. In the **Course Level Codes by Person** field, enter the level of the courses you want to view.

4. In the **Start Term** field, enter the term you wish to view.
   - To view summary information for all terms, leave the **Term** field blank.

5. Click **Go** (or **Alt + Page Down**) to display **Current Standing** for the student.

6. Click the **Term GPA and Course Detail Information** tab (or **Alt + Page Down**) to view GPA and course detail information.
   - Both Institution and Transfer credit are displayed on this form.
   - Institution credit is listed first, followed by transfer credit.
   - Use **page controls** (or **Page Down and Page Up)** to view additional Term GPA information.

Term Sequence Course History

7. Click the **Down Arrow** (or **Alt + Page Down**) to navigate to the **Course Detail** section.
   - Use **page controls** (or **Page Down and Page Up)** to view additional course detail information.
8. Click the **Current Standing** tab (or **Alt + Page Down**) to return to the **SHATERM** page.
9. To view another student, click **Start Over** (or **F5**) and repeat steps 2 through 8
10. To return to the **Welcome** page, click **X** (or **Ctrl + Q**).

Viewing Transfer Credit

1. Access the Transfer Course Information page (**SHATRNS**) from the Welcome page.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
   - If you do not have the ID of the student, click the **Ellipses** to perform a query (see pages 5-6 for additional instructions).
3. In the **Transfer Institution Number** field, enter the transfer institution number.
   - Use the **Ellipses** to search for institutions.
   - If no institution is listed, the transfer information has not been entered.
4. In the **Attendance Period Number** field, enter the attendance period number.
   - Use the **Ellipses** to search for attendance number.
   - If no attendance period is listed, the transfer information has not been entered.
5. Click **Go** (or **Alt + Page Down**).
   - The transfer institution information for the student will be listed.
6. To view specific transfer credit information, click **Go** (or **Alt + Page Down**).
   - This form will display the course information from the transfer institution, the UNC Charlotte equivalent course, and any course attributes assigned to that course.
7. To view credit hour and GPA data for the transfer courses, click **Go** (or **Alt + Page Down**).
8. To view another student, click **Start Over** (or **F5**) and repeat steps 2-7.
9. To return to the Welcome page, click the **Exit** icon (or **Ctrl Q**).

Viewing Prior Institutions

1. Access the Prior College page (**SOAPCOL**) from the Welcome page.

2. In the **ID** field, enter the UNC Charlotte ID of the student.
    - If you do not have the ID of the student, click the **Ellipses** to perform a query (see pages 5-6 for additional instructions).

3. Click **Go** (or **Alt + Page Down**).
    - Prior college information for the student will be displayed.
    - With the cursor in the prior college field, use the down arrow key to view additional prior colleges.
    - If the student received a degree from the prior institution, the degree information will be displayed at the bottom portion of the form.

4. To view another student, click **Start Over** (or **F5**) and repeat steps 2-3.

5. To return to the Welcome page, click the **Exit** icon (or **Ctrl Q**).

Update Registration Override

Student Registration Permit-Override SFASRPO 9.3 (BANDEV)   ADD   RETRIEVE   RELATED   TOOLS

ID: [ ] ...   Niner, Norm P.   Term: [ ] ...   Go

Get Started: Fill out the fields above and press Go.

Student Registration Permit-Override SFASRPO 9.3 (BANDEV)   ADD   RETRIEVE   RELATED   TOOLS   1

ID: Niner, Norm P.   Term: 201780 Fall 2017   Start Over

STUDENT PERMITS AND OVERRIDES   Insert   Delete   Copy   Filter

Permit *	Permit Description	CRN	Subject	Course Number	Section
[ ] ...					

Record 1 of 1

STUDENT SCHEDULE   Insert   Delete   Copy   Filter

CRN	Part of Term	Subject	Course Number	Section	Available	Waitlisted	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Begin Time	End Time	Error	Link	Crosslist Group	Campus	Schedule Type	Section Status	Block Indicator	Registration Status
11584	1	CEGR	4185	091	5	0	✓	✓	✓	✓	✓	✓	✓	1730	2015			CE	M	LC	A		RW
11624	1	CEGR	3225	001	10	0	✓	✓	✓	✓	✓	✓	✓	1100	1215				M	LC	A		RW
11679	1	ENGR	3295	C01	-3	0	✓	✓	✓	✓	✓	✓	✓	1100	1215			31	M	LC	A		RW
11679	1	ENGR	3295	C01	-3	0	✓	✓	✓	✓	✓	✓	✓	1400	1645			31	M	LC	A		RW
16003	1	CEGR	3231	091	17	0	✓	✓	✓	✓	✓	✓	✓	1730	2015				M	LC	A		RW

Record 1 of 8

NOTE: For a blank permit/override field, use the down arrow key or click the Insert (or press **F6**).

1. Access the Registration Permit Override page (**SFASRPO**) from the Welcome page.

2. In the **ID** field, enter the UNC Charlotte ID of the student.
   - If you do not have the ID of the student, click the **Ellipses** to perform a query (see pages 5-6 for additional instructions).

3. In the **Term** field, enter the term you wish to view.

4. Click **Go** (or **Alt + Page Down**).
   - Registration permit override information for the student will be displayed.

5. In the **Permit** field, enter the override type you are issuing to the student.
   - Click the **Ellipses** beside the permit field to see a list of override types.
     - AUTH – Overrides all restrictions except closed section or level restriction *(AUTH is strongly suggested in order to prevent over enrollment)*
     - PERMIT – Overrides all restrictions except time conflicts or level restriction
     - DUP – Overrides duplicate sections (topics courses)
     - TIME – Overrides time conflicts
     - REPEAT – Overrides repeated course error

6. In the **CRN** field, enter the CRN of the section to override.
   - Click the Ellipses to find the CRN of the section.
   - The date of the override and user will be displayed at the bottom of the page.

7. Click **Save** (or **F10**).

8. To enter another override, click **Start Over** (or **F5**) and repeat steps 2-7.

9. To return to the **Welcome** page, click **X** (or **Ctrl + Q**).

Update Advising Holds

1. Access the Hold Information page (**SOAHOLD**) from the Welcome page.

2. In the **ID** field, enter the UNC Charlotte ID of the student.
    - If you do not have the ID of the student, click the **Ellipses** to perform a query (see pages 5-6 for additional instructions).

3. Click **Go** (or **Alt + Page Down**).
    - Hold information for the student will be displayed.

    - Use the **Page Controls** (or **Page Down**) to view additional holds.

4. Select the Advising hold (Hold Type of AD) you want to release.

5. In the **To** field, enter **today's** date.

6. Click **Save** (or **F10**).

7. To view another student, click **Start Over** (or **F5**) and repeat steps 2-6.

8. To return to the Welcome page, click **X** (or **Ctrl Q**).

Update Comments

1. Access the Person Comment page (**SPACMNT**) from the Welcome page.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
   - If you do not know the ID of the student, click the **Ellipses** to perform a query (see pages 5-6 for additional instructions on searching).
3. Click **Go** (or **Alt + Page Down**).
   - The comments pertaining to the student will be displayed.
   - Use **Page Controls** (or **Page Down**) to view additional comments.
4. Click **Insert** (or **F6**).
5. In the **Comment Type** field, enter the comment type (double-click in the **Comment Type** field for a list of values).
6. Place the cursor in the **Comments** field and type the comment.
   - Please include your name at the end of your comment, to ensure accountability.
7. Click **Save** (or **F10**).
8. To view another student, click **Start Over** (or **F5**) and repeat steps 2 and 3.
9. To return to the **Welcome** page, click **X** (or **Ctrl + Q**).

To query a specific comment type:

1. Perform steps 2 and 3.
2. Click the **Ellipses** beside the Comment Type field.
3. Double click the Comment Type you want view.

Update Advisor Information

1. Access the Multiple Advisors page (**SGAADVR**) from the Welcome page.

2. In the **ID** field, enter the UNC Charlotte ID of the student.
   - If you do not have the ID of the student, click the **Ellipses** to find the student (see pages 5-6 for additional instructions).

3. In the **Term** field, enter the term code for the term the advisor change is effective.

4. Click **Go** (or **Alt + Page Down**).

5. Use Insert to add an Advisor or Delete to remove an Advisor.

6. Make sure the advisor type is selected for any new advisors added.

7. One advisor must have the Primary Indicator box checked. (*This is Banner functionality and does not actually indicate a primary advisor.*)

8. Click **Save** (or **F10**).

9. To view another student, click **Start Over** (or **F5**) and repeat steps 2-8.

10. To return to the Welcome page, click **X** (or **Ctrl Q**).

Viewing Class List Information

1. Access the Class Roster page (**SFASLST**) from the Welcome page.

2. In the **Term** field, enter the term code.

3. Enter the **CRN** (Course Reference Number) of the section in the **CRN** field.
   a. If you do not know the **CRN** of the section, click the **Ellipses** and choose **Section Query** from the pop-up box.

   b. Enter section search criteria (term, subject, course number, section number, etc.).

   c. Click **Go** (or **F8**) to search for sections that match your criteria.

   d. Select the section you want by double-clicking on the CRN field, and the CRN will be entered on the **SFASLST** form.

4. Click **Go** (or **Alt + Page Down**) to display the class list for that section.

   - Use **Page Controls** (or **Page Down**) to view additional information.

   - In the **Status** field the following codes may appear (the **first** letter denotes):
     o **R** - Registered
     o **D** - Dropped
     o **W** - Withdrawn

   - This form also displays midterm and final grades (if any have been entered).

5. To return to the **Welcome** page, click **X** (or **Ctrl + Q**).

Viewing Graduation Status Information

1. Access the Degree Summary page (**SHADGMQ**) from the Welcome page.

2. In the **ID** field, enter the UNC Charlotte ID of the student.

   - If you do not have the ID of the student, click the **Ellipses** to find the student (see pages 5-6 for additional instructions).

3. Make sure the **Term** field is blank in order to view all degree information.

4. Click **Go** (or **Alt + Page Down**)**.**

5. The Outcome Status field will indicate the student's degree status. Below are what each status indicate:

   - AW – Awarded Degree

   - AA – Applied for Graduation/Attending Commencement Ceremony

   - DG – Denied for Graduation

   - PD – Pending Decision for Graduation

6. The student's curriculum information (majors, minors, concentrations, etc.) is listed under the Curricula Summary and Field of Study Summary sections.

7. To view another student, click **Start Over** (or **F5**) and repeat steps 2-4.

8. To return to the **Welcome** page, click **X** (or **Ctrl + Q**).

Viewing Academic Standing

1. Access the General Student page (**SGASTDN**) from the Welcome page.

2. In the **ID** field, enter the UNC Charlotte ID of the student.

   - If you do not have the ID of the student, click the **Ellipses** to find the student (see pages 5-6 for additional instructions).

3. In the **Term** field, enter the term you want to view.

4. Click **Go** (or **Alt + Page Down**)**.**

   - The student's General Student records will be listed in the Information block.

5. Select **Academic and Graduation Status, Dual Degree** tab.

   - The student's academic status will be displayed.

6. To return to **SGASTDN**, click the **Learner** tab.

7. To view another student or Term, click **Start Over** (or **F5**) and repeat steps 2-6.

8. To return to the **Welcome** page, click **X** (or **Ctrl + Q**).