Banner for Academic Departments
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The Identification form contains biographical and demographical information for students associated with the University.

To view data on this form, enter the following information in the Key Block:

- In the **ID** field, enter the 8-digit ID number or tab to the next field and enter the person’s Name (in last name, first name order)
  - If there is only one match on the ID or name you entered, both fields in the Key Block will be filled in
  - If there are multiple matches on the Name you entered (there usually will not be multiple matches on an ID number), then the Extended Search window will open. Click on the down arrow next to Search Results, then click on the Name you are looking for. This will fill in the Key Block with the ID number and Name
  - **Perform a Next Block function to view Current Identification block**

There are several blocks on this form. Each block is designated by a tab at the top of the form. To view a specific block, do one of the following:

- Click on the tab containing the block name
- Perform a Next Block function
- Press the F2 key on your keyboard to view a list of blocks, then select the block to view

**SPAIDEN Blocks**

- **Current Identification** – contains the student’s name, full legal name and preferred first name
- **Alternate Identification** – contains any previous names or IDs used by the student
- **Address** – contains the student’s current and inactive addresses. The addresses are grouped together by active address, then inactive addresses. Within each group (active and inactive),
addresses are in alphabetical order by Address Type (for example, CA for Campus address, MS for MailStop address, etc.).

- **Telephone** – contains the student’s telephone numbers, both those associated with an address and any additional phone numbers (for example, cell phone, pager, etc)
- **Biographical** – contains biographical information such as gender, date of birth, social security number, etc *(note: information on this block is viewable only by users with certain access privileges, so you may not be able to view information on this block)*
- **E-mail** – contains the student’s e-mail address
- **Emergency Contact** – contains the student’s emergency contact information, if we have this on file

**Records**
Some blocks contain more than one record. For example, on the Address Information block there could be several different addresses for a student. On blocks that contain more than one record, you can use the scroll bar, Record menu or Record icons to scroll through the various records.

**Options**
For each block, there are several different choices listed under the Options menu. The choices under Options could bring you to another block of the form or to entirely different form. For example, when you are in the Address Information block, Telephone Numbers is listed under Options – when you click on Telephone Numbers, you are brought to the SPATELE Telephone Form.
SGASTDN – General Student Form

The General Student form contains current and historical information about a student. This information includes a student’s status, level, type and major as well as academic status and graduation status.

To view data on this form, enter the following information in the Key Block:

- In the ID field, enter the 8-digit ID number or tab to the next field and enter the person’s Name (in last name, first name order)
  - If there is only one match on the ID or name you entered, both fields in the Key Block will be filled in
  - If there are multiple matches on the Name you entered (there usually will not be multiple matches on an ID number), then the Extended Search window will open. Click on the down arrow next to Search Results, then click on the Name you are looking for. This will fill in the Key Block with the ID number and Name
- To view information for all terms, leave the Term field blank. To view information for specific term, either enter the Term code or click on the Search button (the down arrow) next to Term to select a term
- Perform a Next Block function to view the Learner block

There are several blocks on this form. Each block is designated by a tab at the top of the form. To view a specific block, do one of the following:

- Click on the tab containing the block name
- Perform a Next Block function
- Press the F2 key on your keyboard to view a list of blocks, then select the block to view

SGASTDN Blocks

- Learner – contains general student information such as status and type
- **Curricula Summary Primary** – contains information about the student’s primary major and degree
- **Curricula** – contains detailed information about the student’s current and previous majors and degrees
- **Activities** – contains student activity information
- **Veteran** – contains veteran information
- **Comments** – contains comments about the student’s records
- **Academic and Graduation Status, Dual Degree** – contains the student’s academic standing, anticipated graduation date and any dual degree information
- **Miscellaneous** – contains additional information about the student that may be tracked in Banner

**Records**

Some blocks contain more than one record. For example, on the Learner there could be several different general student records. On blocks that contain more than one record, you can use the scroll bar, Record menu or Record icons to scroll through the various records.

**Options**

For each block, there are several different choices listed under the Options menu. The choices under Options could bring you to another block of the form or to entirely different form. For example, when you are in the first block (student information), Academic Status is listed under Options – when you click on Academic Status, you are brought to the Academic and Graduation Status, Dual Degree block.
**SAFREGO – Registration Query Form**

The Registration Query form lists all courses a student is registered for (student schedule) and all information related to the course (i.e. subject, course number, days and times).

To view data on this form, enter the following information in the Key Block:

- In the **Term** field, either enter the Term code or click on the Search button (the down arrow) next to Term to select a term
- Leave the Registration From and To Date fields blank
- In the **ID** field, enter the 8-digit ID number or tab to the next field and enter the person’s Name (in last name, first name order)
  - If there is only one match on the ID or name you entered, both fields in the Key Block will be filled in
  - If there are multiple matches on the Name you entered (there usually will not be multiple matches on an ID number), then the Extended Search window will open. Click on the down arrow next to Search Results, then click on the Name you are looking for. This will fill in the Key Block with the ID number and Name
- **Perform a Next Block function to view the Schedule information**

You may need to use the scroll bar to view all of the courses the student is registered for.
The Multiple Advisors form is used to assign advisors to a student for the effective term during which they are registered.

To view data on this form, enter the following information in the Key Block:

- In the **ID** field, enter the 8-digit ID number or tab to the next field and enter the person’s Name (in last name, first name order)
  - If there is only one match on the ID or name you entered, both fields in the Key Block will be filled in
  - If there are multiple matches on the Name you entered (there usually will not be multiple matches on an ID number), then the Extended Search window will open. Click on the down arrow next to Search Results, then click on the Name you are looking for. This will fill in the Key Block with the ID number and Name

- In the **Term** field, enter the **advising** Term code or click on the Search button (the down arrow) next to the Term field to select the **advising** term (i.e. the current term is Fall 2005, but we are doing advising for Spring 2006, so you want to enter the code for Spring 2006)

- **Perform a Next Block function to view the existing Advisor information.**
**SPAAPIN – Alternate Personal Identification Number form**

The Alternate Personal Identification Number Form is used to store a student’s Alternate PIN, which is needed for registration.

To find an Alternate PIN:

- Access the SPAAPIN form
- In the **Term** field, enter the **advising** Term code or click on the Search button (the down arrow) next to the Term field to select the **advising** term (i.e. the current term is Fall 2005, but we are doing advising for Spring 2006, so you want to enter the code for Spring 2006)
- In the **ID** field, enter the 8-digit ID number or tab to the next field and enter the person’s Name (in last name, first name order)
  - If there is only one match on the ID or name you entered, both fields in the Key Block will be filled in
  - If there are multiple matches on the Name you entered (there usually will not be multiple matches on an ID number), then the Extended Search window will open. Click on the down arrow next to Search Results, then click on the Name you are looking for. This will fill in the Key Block with the ID number and Name
- **Perform a Next Block function to view the student’s Alternate PIN.**
The Student Registration Permit-Override form is used to enter and track registration overrides for a student. After entering and saving a registration override on this form, you should direct the student to go to CentralPipeline and register for the course. The use of this form to override registration also eliminates the need to complete the paper-based registration override form.

To enter a registration override:

- Access the SFASRPO form
- In the **Term** field, enter the **advising** Term code or click on the Search button (the down arrow) next to the Term field to select the **advising** term (i.e. the current term is Fall 2005, but we are doing advising for Spring 2006, so you want to enter the code for Spring 2006)
- In the **ID** field, enter the 8-digit ID number or tab to the next field and enter the person’s Name (in **last name, first name** order)
  - If there is only one match on the ID or name you entered, both fields in the Key Block will be filled in
  - If there are multiple matches on the Name you entered (there usually will not be multiple matches on an ID number), then the Extended Search window will open. Click on the down arrow next to Search Results, then click on the Name you are looking for. This will fill in the Key Block with the ID number and Name
- **Perform a Next Block function to access the Student Permits/Overrides section of the form.**
Entering a Registration Override

- Click on the Search button (the down arrow) under Permit to open the List-of-Values (LOV).
- From the List-of-Values (LOV) pop-up box, double-click the appropriate override code:
  - CAPACITY – Used to override registration if the course capacity limit has been reached.
  - SPEC/GR – Used to override registration for a Graduate student for any of the following reasons: Degree, Major or Prerequisite
  - SPEC/UG – Used to override registration for an Undergraduate student for any of the following reasons: Class, Degree, Major, Prerequisite
  - TIME – Used to override registration if there is a time conflict with another course on the student’s schedule. Both instructors must be aware of the situation and have given their approval.

*Note: Only the four codes listed above are used to override registration – please do not use any of the other codes in the list.

- In the CRN field, enter the Course Reference Number (CRN) for the course you are overriding. The Subject and Course fields will fill in automatically. If you do know the CRN, refer to Searching for a CRN on Page 5.

Alternate procedures for overriding a prerequisite: When overriding a prerequisite, you can leave the CRN field blank and enter only the Subject and Course fields – this will allow the student to register for any open section (CRN) for that course. To use this alternate procedure:
  - Enter SPEC/UG or SPEC/GR in the Permit field
  - Leave the CRN field blank
  - Enter Subject in the Subject field (i.e. MATH)
  - Enter the COURSE NUMBER in the Crse field (i.e. 115 to override a MATH 115 prerequisite)

- If you are overriding a single course for more than one reason, go to the next blank line under the Permit column and follow the above steps to enter the next reason, using the same CRN. If you are overriding multiple courses, go to the next blank line under the Permit column and follow the above steps to enter the override information for the next course (CRN). If you need to enter more than 3 overrides, click on the Record menu, then Insert to add additional override lines.

- After entering the registration override information, perform a Save function. The student can now go to CentralPipeline and register for the course(s). The use of this form also eliminates the need to complete the paper override form for the Registrar’s office because all of the override information, along with who entered it, will be stored in Banner. It is imperative that individuals enter overrides only for those areas for which they are responsible.

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Example of a Completed Student Permits/Overrides Entry:

<table>
<thead>
<tr>
<th>Student Permits and Overrides</th>
<th>Permit</th>
<th>CRN</th>
<th>Subject</th>
<th>Course Number</th>
<th>Section</th>
<th>User</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAPACITY Course Capacity</td>
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Searching for CRN
To search for a CRN from the SFASPRO form:

- While your cursor is in the CRN field, click on the Search button (the down arrow) under CRN
- At the Option List pop-up screen, click on Search for Sections (SFQSECM)

On the SFQSECM form (Registration Query Form), enter your search criteria:

- In the Subject field, either enter the Subject code or click on the Search button (the down arrow) under Subject to select a subject
  - To view all courses for that Subject, perform an Execute Query function (F8 is the shortcut key to execute a query)
- To view a specific course or section number, enter the information in the Course field and/or Section field, then perform an Execute Query function (F8 is the shortcut key to execute a query). If you do not know the entire Course or Section number, you can use a wildcard (the % symbol) to search on partial numbers. For example, you can enter 5% in the Course field to find all course numbers that start with the number 5, then perform an Execute Query function (F8 is the shortcut key to execute a query).

When you locate the class you are searching for, double-click the CRN to return to the SFASRPO form and the CRN, Subject and Course fields will fill in automatically.
The Student Course Registration form is used to register students for classes and print schedules.

To view data on this form, enter the following information in the Key Block:

- In the **Term** field, either enter the Term code or click on the Search button (the down arrow) next to Term to select a term.
- In the **ID** field, enter the 8-digit ID number or tab to the next field and enter the person’s Name (in last name, first name order)
  - If there is only one match on the ID or name you entered, both fields in the Key Block will be filled in.
  - If there are multiple matches on the Name you entered (there usually will not be multiple matches on an ID number), then the Extended Search window will open. Click on the down arrow next to Search Results, then click on the Name you are looking for. This will fill in the Key Block with the ID number and Name.
- **Perform a Next Block function TWICE to access the Course Information block.** If you are connected to a Banner print queue and just want to print the schedule, perform a Save function THREE times.
Adding a Course
- Click in a blank CRN field and enter the 5-digit CRN (Course Reference Number), then press the Tab key
- **Perform a Save function:**
  - If the course is successfully added to the schedule, perform another Save function. If you are connected to a Banner print queue and want to print the schedule, perform another Save function.
  - If there is a registration error, a Message box will appear. Depending on the situation, you may need to enter an override for the course or drop the course and add another.

Dropping a Course
- Click in the Status field for the course you are dropping from the schedule and enter the code DD.
- **Perform a Save function TWICE.** If you are connected to a Banner print queue and want to print the schedule, perform another Save function.
**SHATERM – Term Sequence Course History Form**

The Term Sequence Course History form is used to view a student’s transcript and GPA information on a term-by-term basis.

To view data on this form, enter the following information in the Key Block:

- In the **ID** field, enter the 8-digit ID number or tab to the next field and enter the person’s Name (in last name, first name order)
  - If there is only one match on the ID or name you entered, both fields in the Key Block will be filled in
  - If there are multiple matches on the Name you entered (there usually will not be multiple matches on an ID number), then the Extended Search window will open. Click on the down arrow next to Search Results, then click on the Name you are looking for. This will fill in the Key Block with the ID number and Name
- In the **Level** field, enter UG for Undergraduate or GR for Graduate
- To view information for all terms, leave the **Start Term** field blank. To view information for a specific term, either enter the Term code or click on the Search button (the down arrow) next to Start Term to select a term
- Perform a Next Block function to the Current Standing block

There is one additional block on this form. To view the block, perform another Next Block function.

**SHATERM Blocks**

- **Current Standing** – contains current academic standing and GPA information
- **Term GPA and Course Detail** - contains GPA information on term-by-term basis as well course grades for each course the student was enrolled in during the displayed term.

**Records**

Some blocks contain more than one record. For example, on the Term GPA and Course Detail block there are records for each term. On blocks that contain more than one record, you can use the scroll bar, Record menu or Record icons to scroll through the various records.
General Course Information

SSASECT – Schedule Form

The Schedule form lists individual course information such as subject, course number, course name, instructor and more.

To view data on this form, enter the following information in the Key Block:

- In the **Term** field, either enter the Term code or d or click on the Search button (the down arrow) next to Term to select a term
- In the **Course Ref. Number** field, either enter the Course Reference Number or double-click the Course Ref. Number field and query for the number on the SSASECQ Section Schedule Query form (see page 15 for instructions on using this form).
- Perform a Next Block function to the Section Details block.

There are several blocks on this form. To view additional blocks, perform a Next Block function

**SSASECT Blocks**

- **Section Details** – contains course information such as subject, part of term, credits, etc.
- **Meeting Times** – contains course start and end time(s)
- **Instructor** – contains instructor information

**Options**

For each block, there are several different choices listed under the Options menu. The choices under Options could bring you to another block of the form or to entirely different form. For example, when you are in the first block (Section Information), Section Enrollment Information is listed under Options – when you click on Section Enrollment Information, you are brought to a block with information on maximum, actual and remaining seats in the course.
SSASECQ – Schedule Section Query Form

The Schedule Section Query form is a query form used to display course information such as enrollment (maximum enrollment, actual number enrolled, number of seats remaining) and course name for all courses offered in any given term.

To perform a query on this form, enter the following information in the first line:

- In the **Term** field, either enter the Term code or click on the Search button (the down arrow) under Term to select a term
- In the **Subject** field, either enter the Subject code or click on the Search button (the down arrow) under Subject select a subject
  - To view all courses for that Term and Subject, perform an Execute Query function (F8 is the shortcut key to execute a query)
  - To view a specific course or section number, enter the information in the **Course** field and/or **Section** field, then perform an Execute Query function (F8 is the shortcut key to execute a query). If you do not know the entire Course or Section number, you can use a wildcard (the % symbol) to search on partial numbers. For example, you can enter 5% in the Course field to find all course numbers that start with the number 5, then perform an Execute Query function (F8 is the shortcut key to execute a query).
- To perform another query, perform an Enter Query function by clicking on the Query menu, then Enter
The Class Roster form is used to view a list of students enrolled in a course. From this form, you can also access detailed information about the course or detailed information about an individual student.

To view data on this form, enter the following information in the Key Block:

- In the Term field, either enter the Term code or click on the Search button (the down arrow) next to Term to select a term.
- In the CRN field, either enter the Course Reference Number or click on the Search button (the down arrow) next to the CRN field, then click on Section Query and query for the number on the SSASECQ Section Schedule Query form (see page 15 for instructions on using this form).
- Perform a Next Block function to the Roster.

**Options**

For each block, there are several different choices listed under the Options menu. The choices under Options could bring you to another block of the form or to entirely different form. For example, when click on Course Section Detail under Options, you are brought to the SSASECT form.

To view detailed student information, use your arrow keys on the keyboard to highlight the student you want to view, then click on IDs, Names and Addresses or Detailed Student Information under Options. For either Option, you will be brought to another form where you may need to perform a Next Block function to view the detailed information. Use the Exit icon to close the current form and return to the Class Roster form.
Departmental Budgets

FGIBAVL – Budget Availability Status Form

The Budget Availability Status Form provides a summarized view by budgeted pooled accounts of a department’s budget, expenditures, commitments, and available balances.

To view data on this form, enter the following information:

- In the Chart field, enter 1
- In the Fiscal Year field, enter the 2-digit fiscal year code (for example, the code for fiscal year 2004 – 2005 is 05)
- In the Index field, enter your Index then press the Tab key on your keyboard. The Fund, Organization and Program Fields will automatically be populated - do not change the fields. Note: If you do not know your Index, click on the Search button (the down arrow) next to the Index field for a list of Indexes.
- In the Account Field, enter 600000 to view all pools. The only pools you are responsible for are:
  - 612000 – Discretionary Personnel Services (P.S.)
  - 612010 – Pool Lectures – Teaching – Academic Area only
  - 700000 - Other Expenses (O.E.)
- Perform a Next Block function to view details.
**FGIBDSR – Executive Summary Form**

The Executive Summary form provides a **summarized** view by ALL accounts of a department’s budget, expenditures, commitments, and available balances. This form can be used to navigate to a more **detailed** view of the amounts and documents related to each individual account.

To view data on this form, enter the following information:

- In the **Chart** field, enter 1
- In the **Fiscal Year** field, enter the 2-digit fiscal year code (for example, the code for fiscal year 2004 – 2005 is 05)
- In the **Index** field, enter your Index then press the Tab key on your keyboard. The Fund, Organization and Program Fields will automatically be populated - do not change the fields. **Note:** If you do not know your Index, click on the Search button (the down arrow) next to the Index field for a list of Indexes.
- To view all accounts, leave the **Account** field blank. To view Other Expenses (O.E.) only, in the **Acct Type** field, enter 70 (this will give you the O.E. available balance).
- **Perform a Next Block function to view details.**

**Detailed Information for Specific Transactions**

The Type field lists a Rule Code that describes the type of transaction. Please see the Index for our most commonly used rule codes and their descriptions.

To view more detailed information for a specific account:

1. Click once in the Acct field for that account
2. Click on the Options menu, then **Transaction Detail Information**. This will list all of the transactions associated with that account.

To view more detailed information for specific transaction:

1. Click once in the Acct field for that transaction
2. Click on the Options menu, then **Query Document**
3. Perform a Next Block function to view Header information (creation date, amount, etc)
4. To view a detailed description, click on the Options menu, then **Commodity/Accounting Information**
**FGIOENC – Organizational Encumbrance List Form**

The Organizational Encumbrance List form lists all the open encumbrances for a specific department. This form can be used to navigate to a detailed view of each individual open encumbrance.

To view data on this form, enter the following information:

- **In the Chart field,** enter **1**
- **In the Fiscal Year field,** enter the 2-digit fiscal year code (for example, the code for fiscal year 2004 – 2005 is 05)
- **In the Index field,** enter your Index then press the Tab key on your keyboard. The Fund and Organization fields will automatically be populated - do not change the fields. *Note: If you do not know your Index, click on the Search button (the down arrow) next to the Index field for a list of Indexes.*
- **Perform a Next Block function to view details.**

**Detailed Information for a Specific Encumbrance**

To view more detailed information regarding a specific encumbrance:

1. click once in the Encumbrance field for that encumbrance
2. Click on the Options menu, then **Query Detail Encumbrance Info**