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Banner Student Quick Reference Card

**Important Information**

**ITS Help Desk**  75500

help@email.uncc.edu

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<td>Summer II</td>
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</table>

**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.**

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<td>Clear Form</td>
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<td>Clear Record</td>
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<tr>
<td>Duplicate Record</td>
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<td>Help</td>
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<td>List of Values (LOV)</td>
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<td>Address</td>
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</table>
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 SGAADVIR. 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).
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

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).
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).
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.
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).
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).
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).
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).