General Student Training Manual

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By: Office of the Registrar
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**Important Information**

To Access Banner: banner.uncc.edu

IT Service Desk
x 75500
help@uncc.edu
help.uncc.edu

Your signed Confidentiality Agreement requires that you:
- Do not share your password or authorize someone else to use it.
- Use your Banner access only in the performance of the responsibilities of your position as a University employee. **You are not authorized to access your own student record in Internet Native Banner.**
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.
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.
Viewing General Person Information

Address

1. Access the General Person Identification page (SPAIDEN) from the Welcome page.

2. In the ID field, enter the UNC Charlotte ID of the student.
   - If you don’t know the ID of the student, click the Ellipses to find the student (see pages 5-6 for additional instructions).

3. Click Go (or Alt + Page Down).

4. Select the Address tab (or Alt + Page Down 2 times).
   - The address information will be displayed.
   - Use page controls to move to additional information (or Page Down and Page Up).

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).
1. Access the General Person Identification page (**SPAIDEN**) from the Welcome page.

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

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

4. Select the **Telephone** tab (or **Alt + Page Down** 3 times).
   - The telephone information will be displayed.
   - Use **page controls** to move to additional information (or **Page Down** and **Page Up**).

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

7. To return to the Welcome page, click X (or **Ctrl + Q**).
Viewing General Person Information

Biographical

1. Access the General Person Identification page (SPAIDEN) from the Welcome page.

2. In the ID field, enter the UNC Charlotte ID of the student.
   - If you don’t know the ID of the student, click the Ellipses to find the student (see pages 5-6 for additional instructions).

3. Click Go (or Alt + Page Down).

4. Select the Biographical tab (or Alt + Page Down 4 times).
   - The biographical information will be displayed.

5. 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).

Please Note:

If the student has a directory restriction on their record, the word Confidential will be at the top of every form with the ID field in the key block. A directory restriction prohibits you from sharing any student information with other individuals or offices. If a student is requesting information, they must show identification in order to receive any information.
Viewing General Person Information

E-mail

1. Access the General Person Identification page (SPAIDEN) from the Welcome page.

2. In the ID field, enter the UNC Charlotte ID of the student.
   - If you don’t know the ID of the student, click the Ellipses to find the student (see pages 5-6 for additional instructions).

3. Click Go (or Alt + Page Down).

4. Select the E-mail tab (or Alt + Page Down 5 times).
   - The e-mail information will be displayed.
   - Use page controls to move to additional information (or Page Down and Page Up).

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

9. To return to the Welcome page, click X (or Ctrl + Q).
Viewing General Person Information

1. Access the General Person Identification page (SPAIDEN) from the Welcome page.

2. In the ID field, enter the UNC Charlotte ID of the student.
   - If you don’t know the ID of the student, click the Ellipses to find the student (see pages 5-6 for additional instructions).

3. Click Go (or Alt + Page Down).

4. Select the Emergency Contact tab (or Alt + Page Down 6 times).
   - The emergency contact information will be displayed.
   - Use page controls to move to additional information (or Page Down and Page Up).

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).
Viewing General Student Information

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.
   - If no term is entered in the Term field, all of the general student records will be displayed back to the earliest record on file.

4. Click Go (or Alt + Page Down).
   - The student’s general student records will be listed in the information block.
   - Use page controls to move to additional information (or Page Down and Page Up).

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).
Viewing Student Class Schedule

1. Access the Registration Query page (SFAREGQ) from the Welcome page.
2. In the Term field, enter the term you want to view.
3. 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 find the student (see pages 5-6 for additional instructions).
   - You do not need to enter any information in the Registration Date Range fields.
4. Click Go (or Alt + Page Down).
   - The student’s class schedule will be displayed.
   - Use the scroll bar at the bottom of the form for additional information.
   - Use page controls to move to additional information (or Page Down and Page Up).

   - In the Registration Status field, the following codes may appear (the first letter denotes):
     - R – Registered
     - D – Dropped
     - W – Withdrawn
5. To view another student or term, click Start Over (or F5) and repeat steps 2-4.
6. To return to the Welcome page, click X (or Ctrl + Q).
Viewing 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 you want to view.

4. Click Go (or Alt + Page Down).
   - The student’s advisor’s UNC Charlotte ID, name, and advisor type will be listed in the information block.
   - Use page controls to move to additional information (or Page Down and Page Up).

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).
Viewing 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 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).
4. The student’s holds will be displayed.
   - The “From” date determines the date the hold is effective.
   - The “To” date determines when the hold is no longer effective.
   - Use page controls to move to additional information (or Page Down and Page Up).
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 a specific hold type:*
1. Perform steps 1 through 3.
2. Click Filter (or F7).
3. Select Hold Type and enter selection criteria.
4. Click Go (or F8).
Viewing 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** to move to additional information (or **Page Down** and **Page Up**).
4. To view another student, click **Start Over** (or **F5**) and repeat steps 2-3.
5. To return to the Welcome page, click **X** (or **Ctrl + Q**).

**To query a specific comment type:**
1. Perform steps 1 through 3.
2. Click **Filter** (or **F7**).
3. Select Comment Type and enter selection criteria.
4. Click **Go** (or **F8**).
Viewing Registration Overrides

1. Access the Student 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.
   - Double click in the permit field to see a list of override types.
     a. AUTH – Overrides all restrictions except closed section or level restriction *(AUTH is strongly suggested in order to prevent over enrollment)*
     b. PERMIT – Overrides all restrictions except time conflicts or level restriction
     c. DUP – Overrides duplicate sections (topics courses)
     d. TIME – Overrides time conflicts
   - The user ID of the person issuing the override will be listed in the Activity User field at the bottom of the page.

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).
Viewing Registration Audit Trail

1. Access the Student Course Registration Audit page (**SFASTCA**) 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. In the **Term** field, enter the term you want to view.

4. Click **Go** (or **Alt + Page Down**).
   - The student’s audit trail will be listed in the Information block.
   - In the **Course Status** field the following codes may appear (the **first** letter denotes):
     - **R** - Registered
     - **D** - Dropped
     - **W** - Withdrawn

5. The Activity User field at the bottom of the page displays the username of the person who processed the registration.

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

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

**Please Note:**

Each registration attempt will have either a **TEMP** or a **BASE** code listed in the **Source** field.

- **TEMP** – a temporary file in which registration is held while the system is checking restrictions, pre-requisites, and co-requisites.
- **BASE** – the registration file in which information is stored after all restriction, pre-requisite, and co-requisite checking is complete.

To query specific information:

1. Perform steps 1 through 4.
2. Click **Filter** (or **F7**).
3. Select Fields to query and enter selection criteria. (Term, CRN, Subject, etc)
4. Click **Go** (or **F8**).
Viewing Account Summary

1. Access the Customer Service Inquiry page (TSICSRV) from the Welcome page.
   - The first time you access TSICSRV (after logging in), the TOADEST form will appear; you do not need to enter anything on this form.
   - Click X (or Ctrl + Q).

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).

3. Click Go (or Alt + Page Down).
   - The student’s account summary will be listed. Any questions or issues with the account information should be referred to the Bursar’s Office.
   - Use page controls to move to additional information (or Page Down and Page Up).

4. To view another student, click Start Over (or F5) and repeat steps 2-3.
5. To return to the Welcome page, click X (or Ctrl + Q).
Viewing Test Scores

1. Access the Test Score Information page (SOATEST) 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).
   - Test scores for the student will be displayed.
   - The Test Code field will display the test code.
   - The Test Score field will display the test score.
   - The Test Date field will display the date the student took the test.
   - Use page controls to view additional test information (or Page Down and Page Up).
4. To view another student, click Start Over (or F5) and repeat steps 2-3.
5. To return to the Welcome page, click X (or Ctrl + Q).