

Banner Student Self-Service Training Workbook

*May 2006
Release 7.3*



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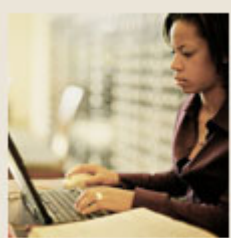
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Section C: Day-to-Day Operations

Lesson: Working with Term Selection

◀ Jump to TOC

Procedure

Follow these steps to select a term.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the <u>Student and Financial Aid</u> tab. From there, click the Registration link. <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p> Personal Information Student and Financial Aid </p> <p> Search <input type="text"/> <input type="button" value="Go"/> </p> <hr/> <h3>Student and Financial Aid</h3> <hr style="border: 2px solid yellow;"/> <ul style="list-style-type: none"> Admissions Apply for Admission or Review Existing Applications Registration Check your registration status, class schedule and add or drop classes Student Records View your holds, grades and transcripts Financial Aid Apply for Financial Aid, review status and loans Student Account View your account summaries, statement/payment history and tax information </div>
3	From the Registration menu, click the Select Term link.
4	On the Term Selection page, select your term.
5	Click the Submit Term button. This term will be used for all term-related pages you select in Student Self-Service unless you return to this page later in your session and select another term.



Section C: Day-to-Day Operations

Lesson: Working with Registration, Add/Drop, and Withdrawal

◀ [Jump to TOC](#)

Introduction

Students can check their registration status. The **Registration Status** page shows them information about items, which affect their ability to register, including

- time ticket assignments
- holds
- academic standing
- student status
- allowable permits and overrides
- current level, college, major, degree, and campus
- number of credit hours that are already earned.



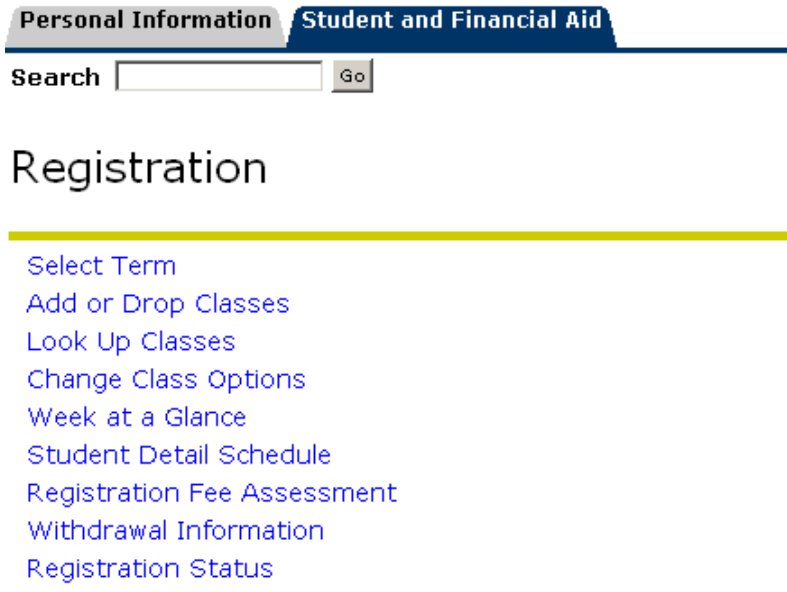
Section C: Day-to-Day Operations

Lesson: Working with Registration, Add/Drop, and Withdrawal (Continued)

◀ Jump to TOC

Procedure

Follow these steps to check registration status.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	<p>Open the Student Services & Financial Aid menu, open the Registration menu.</p> 
3	<p>Click the Registration Status link. (You may be prompted to select a term).</p> <p>On the Registration Status page, the student can see information, which affects his or her ability to register for classes in this term.</p>




Section C: Day-to-Day Operations

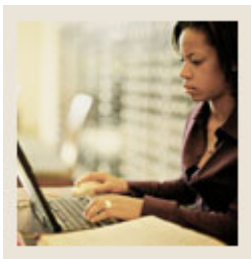
Lesson: Working with Registration, Add/Drop, and Withdrawal (Continued)

◀ Jump to TOC

Procedure

Follow these steps to look up a class to add.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services & Financial Aid menu. From there, click the Registration link.
3	Select Look-up Classes from the Registration menu.
4	On the Select Term or Date Range page, select your term.
5	Click the Submit button.
6	<p>On the Look-Up Classes page, select any combination of values.</p> <div style="border: 1px solid black; padding: 10px;"> <h3 style="margin-top: 0;">Look Up Classes</h3> <hr style="border: 2px solid yellow;"/> <p> Use the selection options to search the class schedule. You may choose any combination of values. You must select at least one Subject. Select Class Search when your selection is complete.</p> <p>Subject: Architecture Art Biology</p> <p>Course Number: <input type="text"/></p> <p>Title: <input type="text"/></p> <p>Schedule Type: All Independent Study Internship</p> <p>Instructional Method: All Non-traditional Traditional</p> <p>Credit Range: <input type="text"/> hours to <input type="text"/> hours</p> <p>Campus: All Annandale Blacksburg</p> <p>Course Level: All Continuing Education Credit</p> <p>Part of Term: All Non-date based classes only First Half Term</p> </div>
7	Click the Class Search button.



Section C: Day-to-Day Operations

Lesson: Working with Registration, Add/Drop, and Withdrawal (Continued)

◀ Jump to TOC

Procedure

Follow these steps to add a class from the look-up classes search results in the previous exercise.

Step	Action
1	Click a checkbox on the left side of the search results list to select a class.
2	Click the Register button. This opens the Add or Drop Classes page.
3	The class is added to the student's schedule. You can see it in the Current Schedule listing. Look at the Status column. Do you see that this class appears as <i>**Web Registered**</i> ?

Procedure

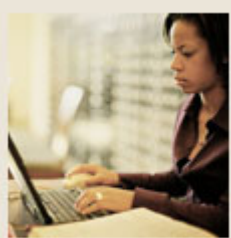
Follow these steps to drop a class from the add/drop page.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	From the Registration menu, open the Add or Drop Classes page. (You may be prompted to select a term).
3	Look at the classes in the Current Schedule section.
4	From the pull-down list to the left of the class you added in the previous exercise, select the drop code. (This is the code you created and Web-enabled previously).
5	Click the Submit Changes button. <u>Result:</u> The page is redisplayed and the class you dropped is removed from the Current Schedule section.

Procedure

Follow these steps to change class options.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services & Financial Aid menu, then open the Registration menu.
3	Click the Change Class Options link. (You may be prompted to select a term).
4	On the Change Class Options page, you will see a pull-down list next to any item that a student can change. To change an option, open a list and select a new value.
5	Click the Submit Changes button.



Section C: Day-to-Day Operations

Lesson: Working with Student Schedules

◀ Jump to TOC

Procedure

Follow these steps to view **Week at a Glance**.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services & Financial Aid menu. From there, click the Registration link.
3	From the Registration menu, click the Week at a Glance link.
4	If you are prompted for a term, select your term from the list, then click the Submit Term button.
5	On the Week at a Glance page, look at the student's schedule. <ul style="list-style-type: none">• If the data range for a class does not include today's date, if meeting dates have not been assigned to a class, or if a class has a time conflict with another class the student is enrolled in, then it is not included in the calendar view.• Classes that a student is enrolled in but that are not shown in the calendar view are listed beneath the calendar.• Schedules for terms (or parts of terms) that do not include today's date have a link that appears towards the bottom of the page.
6	To see detailed information about a particular class, click the link for that class, either in the calendar view or in the list beneath the calendar view.
7	To see a calendar view for a term that does not include today's date, click the link for that term (if one exists).

Procedure

Students can also see a detailed look at their schedules. Follow these steps to view student detail schedule.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	From the Registration menu, click the Student Detail Schedule link.
3	If you are prompted for a term, select your term from the list, then click the Submit Term button.
4	The Student Detail Schedule page shows information about each class the student is currently enrolled in, including campus, level, grading mode, days, time, location, schedule type, date range, and instructor(s).



Section C: Day-to-Day Operations

Lesson: Working with Student Schedules (Continued)

◀ Jump to TOC

Procedure

Follow these steps to view withdrawal and Title IV information.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Log in as the student you withdrew in the set-up exercise.
3	Open the Student Services & Financial Aid menu, then open the Registration menu.
4	Click the Withdrawal Information link to review withdrawal information.
5	Click the Amount of Title IV Aid Disbursed or Amount of Title IV Aid Eligible to be Disbursed links to review Title IV information.



Section C: Day-to-Day Operations

Lesson: Working with Student Records

◀ Jump to TOC

Procedure

Follow these steps to view holds.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services and Financial Aid, then the Student Records menu.
3	Click the View Holds link.
4	Look at the information that is displayed.

Procedure

Follow these steps to view midterm grades.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services and Financial Aid, then the Student Records menu.
3	Click the Midterm Grades link. <u>Note:</u> You may be prompted to select a term.
4	Look at the grades that are displayed. <u>Note:</u> If a grade hold is currently in effect for the student, the message “ <i>Your grades are not available due to holds on your record</i> ” will display instead of the Select Term pull-down list, and no grade display will be available to the student.

Procedure

Follow these steps to view final grades.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services and Financial Aid, then the Student Records menu.
3	Click the Final Grades link.
4	Select a term.
5	Click the Display Grades button.
6	Look at the grades that are displayed. <u>Note:</u> If a grade hold is currently in effect for the student, the message “ <i>Your grades are not available due to holds on your record</i> ” will display instead of the Select Term pull-down list, and no grade display will be available to the student.



Section C: Day-to-Day Operations

Lesson: Working with Student Records (Continued)

◀ Jump to TOC

Procedure

Follow these steps to view detail from gradable components in the Electronic Gradebook.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services and Financial Aid, then the Student Records menu.
3	Click the Grade Detail link.
4	On the Select Section page, select a CRN.
5	Look at the grade detail that is displayed. This page shows detail about gradable components for the class as well as the marks the student has received for the gradable components.

Procedure

Follow these steps to view a transcript.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services and Financial Aid, then the Student Records menu.
3	Click the Academic Transcript link.
4	On the Display Transcript - Select Level and Type page, select a level and a transcript type.
5	Click the Submit button. This displays an unofficial transcript.

Procedure

Follow these steps to view account information.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services and Financial Aid, then the Student Records menu.
3	Click the Account Summary by Term link. (You may be prompted for a term).
4	View the student's account information for the current term.
5	Click the Return to menu button at the top of the page.
6	Click the Account Summary link.
7	View the student's account information.



Section C: Day-to-Day Operations

Lesson: Working with Student Records (Continued)

◀ Jump to TOC

Procedure

Follow these steps to view tax information.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services and Financial Aid, then the Student Records menu.
3	Click the Select Tax Year link.
4	On the Select Tax Year page, enter a tax year.
5	Click the Submit button.
6	View the student's tax information. <u>Note:</u> Students can update information on this page.
7	Click the Student Services & Financial Aid link from the menu at the top of the page.
8	Open the Student Records menu, then click the Tax Notification link.
9	View the student's tax notification information.

Procedure

Follow these steps to view a degree evaluation.

Note: The evaluations that faculty see in WebCAPP are *not* official evaluations.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Go to the Student Services & Financial Aid menu and open the Student Records menu.
3	Click the Degree Evaluation link. <u>Result:</u> The Degree Evaluation page is displayed. It has links that allow you to view the current evaluation, a previous evaluation, or to generate a new one. You can also generate a What If Analysis . <u>Note:</u> If an evaluation has never been generated for this student in this curriculum, the program name is not underlined. The student can view evaluations for other curricula, if any exist, by using the View Previous Evaluations link; this is covered later in this lesson.



Section C: Day-to-Day Operations

Lesson: Working with Student Records (Continued)

◀ Jump to TOC

Procedure

Follow these steps to generate a new evaluation.

Step	Action
1	On the Degree Evaluation page, click the Generate New Evaluation link at the bottom of the page.
2	On the Generate New Evaluation page, select the following: <ul style="list-style-type: none">• program• degree• major• term
3	Click the Generate Request button.

Procedure

Follow these steps to view a previous degree evaluation.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	On the Degree Evaluation page, click the View Previous Evaluations link at the bottom of the page.
3	On the View Degree Evaluations page, select a program from the Select Program list. (If "Not applicable" is displayed, open the list to see all programs for the student).
4	Click the View Request button.
5	At this point, the system works the way it works for viewing a current evaluation. The Degree Evaluation Display Options page is displayed, and you can choose the type of evaluation you want to view following the steps you just practiced.
6	On the Degree Evaluation Display Options page, select the View General Requirements radio button. It might take several moments for the page to be displayed because the system must run a process to calculate the data.
7	Click the Select Desired View button. The General Requirements page shows a summary of the degree evaluation. For example, it shows that the classes the student has taken toward requirements, including credit hours, grades, and course reference numbers (CRNs).



Section C: Day-to-Day Operations

Lesson: Working with Student Records (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
8	<p>Repeat steps 1-5, but this time select the View Detail Requirements radio button.</p> <p>The Detail Requirements page shows the details of the degree evaluation. For example, it shows all the classes that the student needs to take to meet the program requirements and whether the requirement has been met.</p> <p><u>Note:</u> You can generate a printer-friendly version of these views. To do this, select the Click for printer friendly version check box on the Degree Evaluation Display Options page before you click the Select Desired View button.</p>



Section C: Day-to-Day Operations

Lesson: Working with Personal Information

◀ Jump to TOC

Introduction

Students have access to the Personal Information Menu. Pages in this menu are actually part of the Self-Service for General product, and so users of all Banner Self-Service products automatically have access to these pages.

From this menu, students can

- change their pins
- change their login verification question
- view and update their current address, telephone, and e-mail information
- view their Directory Profile
- view and update their emergency contact information
- update their marital status
- respond to surveys
- find information regarding institutional policies on updating name information
- find information on how to modify their U.S. Social Security information.

Display of addresses, telephone numbers, and e-mail addresses

You control which addresses, by their associated address type, will appear in Self-Service for Students. To do this, you need to create rules on the Address Role Privileges Form (GOAADRL).

When students submit changes to their addresses via Self-Service for Students, the changes are immediately entered in the Banner database. In addition, they are stored in a review form. You can use this review form, the Address Review and Verification Form (GOAADRR) to ensure that the updated information conforms to your institutions data entry guidelines.

Students can see only e-mail addresses that have been Web-enabled on GOAEMAL in Self-Service for Students.

Changing PINs

When a student changes his or her PIN, the updated PIN information (and the audit trail of changes) is stored on the Third Party Audit Form (GOATPAD).



Section C: Day-to-Day Operations

Lesson: Working with Personal Information (Continued)

◀ [Jump to TOC](#)

Directory Profile

You can establish rules defining what information is displayed for students in their directory profile. Students can then specify what information they wish to have displayed in their profile when the Campus Directory is generated.

You establish Directory Profile rules on the Directory Options Rule Form (GOADIRO). When students make changes to their online Directory Profile, those changes are entered in to the Web User Directory Profile Form (GOADPRF).

Emergency contact information

Students can see and update their emergency contact information that is stored on the Emergency Contact Form (SPAEMRG).

Changes to name and U.S. Social Security information

Students cannot change their name or their U.S. Social Security Number information using Self-Service for Students. They can access pages on which your institution can provide directions or information on how they might do this.

Respond to surveys

You can create surveys in Banner that you can then distribute to students. When you create your surveys, you can specify that everyone with a particular Web user role will receive the survey or you can create and use a population selection to determine who will receive the survey.

As students respond to the survey, you can view the results in Banner.



Section C: Day-to-Day Operations

Lesson: Working with Personal Information (Continued)

◀ Jump to TOC

Procedure

Follow these steps to change a PIN.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Personal Information menu.
3	Click the Change PIN link.
4	In the corresponding fields, enter the current PIN and a new PIN.
5	Click the Change PIN button.

Procedure

Follow these steps to change a login verification question.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Personal Information menu.
3	Click the Change Security Question link. The old question and answer is displayed.
4	In the corresponding fields, enter the new question and answer.
5	Click the Submit button.



Section C: Day-to-Day Operations

Lesson: Working with Personal Information (Continued)

◀ Jump to TOC

Procedure

Follow these steps to view and update current address, telephone, and e-mail information.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	<p>Open the Personal Information menu.</p> <p>Personal Information</p> <hr/> <p> Answer a Survey Change Security Question View Addresses and Phones Summit: Update Addresses and Phones View E-mail Addresses Update E-mail Addresses Directory Profile View Emergency Contacts Update Emergency Contacts Update Marital Status Name Change Information Social Security Number Change Information Change your PIN </p> <p><small>Need to update your PIN? Change it here.</small></p>
3	Click the View Addresses and Phones link.
4	On the View Addresses and Phones page, review the current information.
5	Click the Update Addresses and Phones link at the bottom of the page.
6	<p>To update an existing address, click the Current link that is displayed next to it.</p> <p>If "Current" does not have a link, then that address has an address type that is designated as display-only the Address Role Privileges Form (GOAADRL).</p>
7	In the corresponding fields, enter the new address and telephone number information.
8	<p>Click the Save button.</p> <p><u>Note:</u> The changes are automatically entered into Banner.</p>
9	Click the Personal Information link at the top of the page.



Section C: Day-to-Day Operations

Lesson: Working with Personal Information (Continued)

◀ Jump to TOC

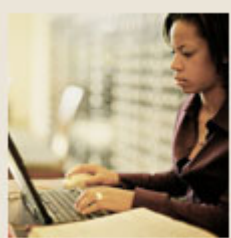
Procedure, continued

Step	Action
10	On the Personal Information menu, click the View E-mail Address Information link.
11	On the View E-mail Addresses page, review the current information.
12	Click the Update E-mail Addresses link at the bottom of the page.
13	From this point, you can update e-mail addresses in a manner similar to that for updating regular addresses.

Procedure

Follow these steps to view and update a directory profile.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Personal Information menu.
3	Click the Directory Profile link.
4	On the Directory Profile page, review the current information.
5	To include an item in the Campus Directory, select the Display in Directory check box.
6	Click the Submit Changes button.



Section C: Day-to-Day Operations

Lesson: Working with Personal Information (Continued)

◀ Jump to TOC

Procedure

Follow these steps to view, update, and review emergency contact information.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Personal Information menu.
3	Click the View Emergency Contacts link.
4	On the View Emergency Contacts page, review the current information.
5	Click the Update Emergency Contacts link at the bottom of the page.
6	On the Select Contact page, click the name of an existing contact or the New Contact link.
7	On the Up Emergency Contacts page, enter updated information in the appropriate fields.
8	Click the Submit Changes button.
9	In Banner, go to the Emergency Contact Form (SPAEMRG).
10	In the ID field, enter the student's Banner ID.
11	Perform a Next Block function.
12	Review the emergency contact information.

Procedure

Follow these steps to update and review marital status information.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Personal Information menu.
3	Click the Update Marital Status link.
4	On the Update Marital Status page, select a new marital status.
5	Click the Update Marital Status button.
6	In Banner, go to the General Person Form (SPAPERS).
7	Review the value in the Marital field.



Section C: Day-to-Day Operations

Lesson: Working with the Account Detail for Term Page

◀ Jump to TOC

Introduction

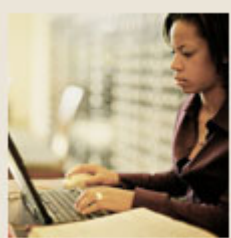
The Account Detail for Term page (bwskoacc.P_ViewAcctTerm) displays detailed account information for the selected term on one page, which makes it easy for a student to review their account detail and see at a glance how much money they owe the institution.

When assessments are enabled on SOATERM and SLATERM, and a student who has not been assessed or who has charges pending accesses the page, fee assessment will run automatically. This applies to tuition and fees, as well as housing (including room, meals, and phone). Other information may also display, such as memoed and authorized financial aid, other Accounts Receivable memos (contracts, exemptions, deposits), and installments as enabled via TSATERM. New assessments and installment plan assignments are saved to the database, but calculated memo transactions are not retained.

The values that display on this page depend on the choices made on TSATERM for memos and authorized financial aid, and on TSACTRL for installment plan information.

Your institution can choose to display a **Pay Now** button on the page, which lets students access the payment gateway and enter credit card information to make a payment on their account.

Note: Display of detail codes in the Account Summary and the Account Detail Self-Service pages can be suppressed by setting the External Code to N(o) on GTVSDAX for internal code *WEBDETCODE* in group *WEBACCTSUM*.



Section C: Day-to-Day Operations

Lesson: Working with the Account Detail for Term Page (Continued)

◀ [Jump to TOC](#)

Account Detail for Term – sections

The Account Detail for Term page contains these sections:

- Account Detail
- Authorized Financial Aid
- Memos
- Installment Plan

You can also link to the Statement and Payment History page from the Account Detail for Term page.

Account Detail

This section displays charge and payment transactions for the selected term on the student's account. Each individual transaction can be displayed or the transactions can be summarized by detail code. The institution may also choose to display totals for Account Balance Only or both Account Balance and Current Due, which excludes future-dated transactions.

Authorized Financial Aid

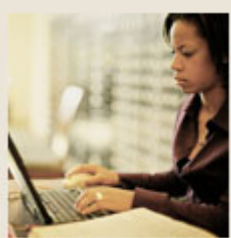
This section displays the financial aid that is authorized, but not yet disbursed to the student's account. The Authorized Financial Aid Balance reduces the Account Balance and Current Due. In this section, the institution may choose to display No Calculated totals, Adjusted Account Balance, or both Adjusted Balance and Current Due.

Memos

This section displays pending transactions not yet posted to the student's account. Expected charges increase the Account Balance and Current Due, while expected payments reduce the Account Balance and Current Due. In this section, the institution may choose to display No Calculated totals, Adjusted Account Balance, or both Adjusted Balance and Current Due. This section includes financial aid memos, third party contract credits, exemptions, deposits eligible for release, and other Accounts Receivable memos.

Installment Plan

This section displays the amounts and dates that installment plan payments becomes due if the student chooses to pay by installment.



Section C: Day-to-Day Operations

Lesson: Working with the Account Detail for Term Page (Continued)

◀ Jump to TOC

Procedure

Follow these steps to view information on the Account Detail for Term page.

Step	Action
1	Log onto Self-Service for Students by clicking on Enter Secure Area .
2	Open the Student Services and Financial Aid, then the Student Records menu.
3	Click the Account Detail for Term link. <u>Result:</u> The Select Term page is displayed.
4	Choose a term from the pull-down list and click the Submit button.
5	Review the sections of the web page: <ul style="list-style-type: none">• Account Detail• Authorized Financial Aid• Memos• Installments Plans <u>Note:</u> Info text may display within each section.



Release Date

◀ [Jump to TOC](#)

This workbook was last updated on 5/31/2006.