

Banner Student Information System

Setting up a User Account

University employees are entitled to have access to Self Service Banner (SSB) for purposes of carrying out their job responsibilities. A limited number of University employees will be given access to Internet Native Banner (INB).

Before access to Banner may be granted, a prospective user must: (1) complete a Banner Training/Access Form, found at www.usu.edu/registrar/faculty; and (2) attend a corresponding Banner training session. The form must be signed by the employee's supervisor and the person who provided the training.

Banner Training Sessions for Advisors

The Office of University Advising (UA) offers two different workshops for prospective Banner users: (1) AD 101 is Self Service Banner (SSB) Training for Advisors. This workshop is open to nearly any University employee who desires to attend. (2) AD 102 is Internet Native Banner (INB) Training for Advisors. Attendance at this workshop should be by invitation only.

Advisor-Level Access in Banner

At Utah State University, Self Service Banner (SSB) has been set up in such a way that employees classified as an "Advisor" will have access to the records of all students. Faculty who are not classified as an "Advisor" will only have access to view records of students who are enrolled in their classes.

In order to grant "Advisor" access in SSB, the Registrar's Office is forwarding all Banner Training/Access Forms to the Office of University Advising (UA) for Stephanie Hamblin to initial. "Advisor" access is being approved for all academic advisors (professional and faculty), deans, department heads, and other administrators. In addition, many staff assistants within academic departments are also being approved to receive "Advisor" access.

Banner Account Information

University employees who have questions or concerns about their access in Banner should contact Carl Ellsworth or Shane Livingston in the Registrar's Office at 797-7095.

Self Service Banner (SSB)/Access

Starting Self Service Banner (SSB)/Access

Go to <http://www.usu.edu/myusu> using any web browser.

Login to Access. This link will allow you to access student information. You must enter your USER ID and PIN. All students and University employees will be assigned a unique USER ID.

The USER ID will be used in Banner to look up an individual's record. The USER ID is nine characters long, similar to a social security number. However, the USER ID always begins with a capital A, followed by eight numbers. This is being more commonly referred to as an A-number.

When a person first accesses Self Service Banner, the PIN is the six-digit birthdate. For example, the PIN of a person born July 15, 1963 would be 071563. For security reasons, the first time anyone uses Self Service Banner, he or she will be forced to change the PIN. Banner will then prompt the user to enter a question that may help him or her remember his or her password (*this is important).

A link has been created for students to enable them to enter their social security number and last name in order for them to find out their new Banner USER ID (A-number). Once again, their initial PIN will be their six-digit birthdate (MM/DD/YY).

When you successfully enter your USER ID and PIN, you will see the Main Menu.

If you leave SSB idle for 15 minutes or longer, you will be forced to login again before proceeding.

Class Schedule. You do not have to enter a USER ID (A-number) or PIN to see the class schedule. Selecting this option will allow you to search for individual sections of classes for a specific term.

Course Catalog. You do not have to enter a USER ID (A-number) or PIN to see the course catalog. This option will allow you to see more detailed course descriptions, as you might find in the *General Catalog*.

Self Service Banner (SSB)/Access Main Menu

Those who login correctly will go directly to the Main Menu. The Main Menu options that appear in Self Service Banner are contingent on the individual's circumstances. For example, those who work with budgets will see a *Finance* menu option. A student will see a *Student & Financial Aid* menu option.

As an advisor, two of the menu options you should see are *Personal Information* and *Faculty & Advisors*. This handbook will focus only on these two options.

Personal Information Menu Option

Everything under the *Personal Information* menu option deals with the record of the person logged in.

Change Security Question. Allows you to change the security question and answer that will be used to assist you in remembering your PIN number, should you forget it.

View Addresses and Phones. Allows you to view your own addresses and phones, as currently entered in the Banner system.

View E-mail Addresses. Allows you to view your USU e-mail address.

Change your PIN. Allows you to change your PIN at any time. Users will automatically be forced to change their PIN every six months.

Other menu options are also available.

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Faculty & Advisors Menu Option

This menu option is designed to assist faculty members and advisors in accessing student records. Clicking on this option will bring up a menu called *Faculty Services*.

Student Information Menu

Select this option to look up the records of individual students.

Term Selection. All student records are term-specific. Banner will begin by using the term Fall 2005.

ID Selection. You may look up an individual student either by USER ID (A-number) or by entering the student's first and last name. It is recommended that you enter a student's USER ID (A-number) since it is unique. Entering a name may result in many records being identified, forcing you to review several records individually until you find the one you are looking for.

Student Information. This option will show you if a student is registered for the selected term, the first term attended, residency, citizenship, student type: new or returning, class, advisor, program, admit term, admit type, catalog term, level, degree, college, campus, department, first major, and primary advisor.

Student Addresses and Phones.

Student E-mail Address.

Student Schedule. This option displays the total number of credits for which a student is registered. In addition, you will see the following information for each individual class: CRN (Course Reference Number), status, assigned instructor and e-mail link, credits, level, campus, meeting time, meeting days, meeting location, beginning and ending dates of the class, and schedule type.

Add or Drop Classes. Allows you to modify a student's registration. This option requires an advisor to enter a student's PIN.

Academic Transcript. This option will display a student's birthdate, college, major, academic standing, and a history of courses taken and grades received.

Active Registrations. This option is similar to Student Schedule, but has slightly different options. For each course for which a student is registered, you will see the CRN (Course Reference Number), status, schedule type, instructional method, campus, credits, grade mode, course level, instructor, and course URL.

Registration History. Contrary to what this menu option might imply, in most cases this option will only display the courses for which a student is currently registered. Minimal information is provided, such as the CRN (Course Reference Number), course prefix and number, course title, credits, level, status, and final grade.

Advisee Listing. This option will display information about advisees assigned to the advisor who is logged in, including each student's name, ID (A-number), and advisor type. The screen also has direct links for each advisee's student information, holds, test scores, transcript, and degree evaluation. There are also links to e-mail individual students or all students assigned to the advisor.

When e-mailing a group of students, it is recommended that advisors put their own e-mail address in the "To" entry box, and do a blind carbon copy to the list of students. This will prevent students from having inappropriate access to the other e-mail addresses in the list.

Test Scores. This option will display ACT and SAT test scores, along with a student's admission index.

View Holds. This option will display most holds that a student may have. In some circumstances, the information is confidential and will not display on the screen.

Other Menu Options under Faculty Services

Term Selection. Use a drop-down box to select the current term.

CRN Selection. Displays only the CRN (Course Reference Number) of each class for which a faculty member is assigned as the instructor.

Faculty Detail Schedule. Displays the details for all courses a faculty member is scheduled to teach. This includes dates available for registration, college, department, credits, course level, and campus. There are also links for the faculty member to add a syllabus, view a summary class list, or add office hours.

Week at a Glance. This option allows a faculty member to view his or her own schedule in a table format, by time and day.

Detail Class List. This option displays the actual enrollment for a class the faculty member is scheduled to teach. It displays the maximum enrollment, actual enrollment, and seats remaining. It also shows more detailed information about each student in the class, such as each student's ID (A-number), the date the student registered, program, level, college, department, degree, major, class, and credits.

Summary Class List. This option provides a condensed, one line per student, listing of students enrolled in a class. The listing includes each student's ID (A-number), level, and credits. It will also display a student's final grade. An icon displays at the end of each record for which an e-mail address has been identified. The faculty member may click on the icon to send e-mail to a specific student, or click on a link at the bottom of the page to send e-mail to all students in the class.

Final Grades. This option allows a faculty member to submit final grades for a class, or to go back and review grades after they have already been submitted.

Add and Drop Classes. This option works the same as listed under the *Student Information Menu*.

Look Up Classes. This option allows you to look up open classes and register a student for a class directly from this menu. This option requires an advisor to enter a student's PIN.

Active Assignments. This option displays classes for which a faculty member is currently scheduled to teach. This option does not list courses that have rolled to Academic History.

Class Schedule. This option works the same as the menu option listed when a user first enters Self Service Banner.

Course Catalog. This option works the same as the menu option listed when a user first enters Self Service Banner.

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Office Hours. Allows a faculty member to submit the office hours assigned to a specific course.

Banner Documentation. Links to the Banner Bookshelf, which contains a lot of the technical documentation associated with Banner.

Degree Evaluation. Will run a student-specific degree audit.

Section Enrollment Totals. This option is one that advisors will likely use very frequently. Unlike the Class Schedule link, you will be able to see a condensed listing of available courses, including the CRN (Course Reference Number), course prefix and number, course title, campus, credits, days, times, enrollment cap, actual enrollment, seats remaining, instructor, and location.

Student Privacy

All University employees who access Banner must abide by the FERPA laws. Information given to a third party may only include the Directory/Releasable Information. For more information, see FERPA links at: www.usu.edu/registrar/faculty

In SSB, a privacy hold does not automatically pop up. The only way to see if a student has a privacy hold is to search for it. This is accomplished by going to the Faculty & Advisors menu, selecting the Student Information Menu, and clicking on the Student Information link. This screen will indicate if a student has a privacy hold.

When a student has a privacy hold, you may **NOT** reveal any information about the student, not even the fact that a student record is present in Banner. If an individual contacts you and requests information on a student that has invoked the privacy act, it is recommended that you use a statement such as the following:

I'm sorry, I have no information on this individual.

Exiting Self Service Banner

Please do **not** exit Banner by simply closing the Banner window. You should exit Banner by following these steps.

1. Click on the word "Exit" found in the upper-right corner of most Self Service Banner screens.
2. Close your browser as you normally would.

Summary of Self Service Banner Menus

As an advisor, the following four menus are the ones you will be most likely to use.

Opening Menu. This is the first screen that appears with the top link being *Login to Access*.

Main Menu. You will see this menu after logging in. This is the menu where you click to look at your own Personal Information or to go into the *Faculty & Advisor* menu.

Faculty Services Menu. This menu is mainly used by faculty members and displays information related to the classes they are assigned to teach.

Student Information Menu. You get to this menu by clicking on the first link in the Faculty Services menu. The Student Information Menu is mainly used by advisors and displays student-specific information.

Finding Specific Information in the Student Information Menu

Academic Action (term specific) - Academic Transcript

ACT Test Scores - Test Scores

Address - Addresses and Phones

Admission Index - Test Scores

Admission Term - Student Information

Advanced Placement Credit - Academic Transcript

Advisee Listing - Advisee Listing

Advisor Assignment - Student Information

Birthdate - Academic Transcript

Campus - Student Information

Catalog Term - Student Information

Citizenship - Student Information

Class Level (term specific) - Student Information

Class Schedule (term specific) - Student Schedule

College (term specific) - Student Information

Degree in Progress (term specific) - Student Information

Degrees Awarded - Academic Transcript

Department (term specific) - Student Information

Earned Hours - Academic Transcript (Transcript Totals)

E-mail Address - Student E-mail Address

First Major - Student Information

First Term Attended - Student Information or Academic Transcript

GPA Hours (formerly Quality Hours) - Academic Transcript

Grade Point Average - Academic Transcript (Transcript Totals)

Last Term Attended - Student Information or Academic Transcript

Major (term specific) - Student Information

Minor (term specific) - Student Information

Phone - Addresses & Phones

Previous Schools Attended - Academic Transcript

Quality Points - Academic Transcript

Registration - Add & Drop Classes

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Registration Audit Trail (term specific) - Registration History (only shows classes for which a student is enrolled)

Registration Holds - View Holds

Residency Status (term specific) - Student Information

SAT Test Scores - Test Scores

Transcript - Academic Transcript

Registration Add Errors

Various messages will appear while attempting to register students for classes using SSB. The status ****Registered**** will appear when a student is successfully enrolled in a course. An unsuccessful attempt to register may result in one of the messages listed below. The following information explains what steps need to be taken when these various messages appear on the screen.

Closed Section - The student must obtain the instructor's signature on an Add/Drop Card.

Preq and Test Score-Error -The student must obtain a signature from a department representative on a Course Authorization Form.

Major Restriction - The student must be matriculated into the major that offers the course.

Honors Program - The student must qualify for the Honors Program (see page F5) and obtain authorization to take the class.

Student Support Services - The student must qualify for Student Support Services (see page F10) and obtain the instructor's signature.

Instructor's Signature - The student must obtain the instructor's signature on an Add/Drop form.

There are other error messages in addition to those listed above. A more comprehensive list will be available at a later date.

Internet Native Banner (INB)

Starting Internet Native Banner (INB)

Go to <http://banner.usu.edu> using any web browser. Windows users must accept the applet download. There is a link at the top of the page that will assist with this process.

You will see a few menu options. Under the heading *USU Banner Links*, click on the appropriate Internet Native Banner (INB) link, depending on whether you are using *Windows* or *Mac OS X* or *Linux*.

Login. Users will be prompted to enter their username and password. This information should be e-mailed to the user after completing the Banner Training/Access Form. If you do not have this information, contact Carl Ellsworth or Shane Livingston at 797-7095.

In INB, the username is typically in the format `firstname_lastname` (e.g., `john_mortensen`).

Once you login correctly, INB will actually have two windows open in your browser. Closing either window will exit you from INB.

Internet Native Banner (INB) is not as intuitive as Self Service Banner. INB requires that users be familiar with the names of specific forms, tools, and menu options.

Internet Native Banner (INB) Forms

Users access information in INB through the use of forms. Some of the forms most frequently used by advisors are listed here.

SAAADMS - Displays student information, including the admission decision, college, degree program, residency, campus, catalog term, citizenship, admit type (freshman, transfer), and student type (new, continuing, etc.).

SGASTDN - SSB users will not see any information about a student until this form has been populated in INB, which creates a General Student record. This form shows most of the same information as SAAADMS. Additionally, this form displays a student's status (active, dismissed, inactive due to graduation, excused leave of absence, inactive, suspended, withdrawn), class rank, major, minor, program, and department.

SFAREGQ - Displays information about each course for which a student is registered, including each Course Reference Number (CRN), course subject, course number, course section, dates and times, location, credits, campus, and instructor.

SFASLST - Displays all students who are registered for a specific course, including each student's A-number and name. The listing is sequenced in the order that the students registered for the class and shows the date each student registered.

SFASRPO - This form is used to authorize a student to register for a specific course. This authorization will override any prerequisites or corequisites, but will not override a full class (using this form prevents a student from standing in line).

SFASTCA - This form shows a registration audit trail for a student for the term specified, including every attempt to add or drop a course. Specific information includes each course reference number (CRN), subject, course, section, campus, level, credit hours, add date, the user who added the class, and the date and time of each registration transaction.

SGAADVR - This form is used to assign advisors to individual students. Multiple advisors may be assigned to any student. Advisor types include Athletics, Career Services, Concentration, Regional Campuses and Distance Education, Financial Aid, Graduate, International, Major, Minor, Multicultural Student Services, Peer, Student Support Services, and Thesis. Although a student may have multiple advisors, only one may be designated as the Primary advisor. The Primary advisor should ALWAYS be the Major advisor.

SHADEGR - Displays degrees awarded by Utah State University.

SHATERM - Displays first and last term attended, academic standing, earned hours, and GPA.

SHATRNS - Displays information regarding a student's transfer work, including the transfer institution, transfer degree, and transfer attendance periods. Advanced Placement (AP) credits are posted as transfer work. By using the Next Block feature on this form, the user may also view information regarding individual transfer courses including the transfer course prefix and number and the USU equivalent course information.

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SOAHOLD - This form is used to place and remove holds on a student's record. A hold is placed by entering the *Hold Type*. Double-clicking within the text box will bring up a listing of possible options. The name of the Banner user will automatically appear as the name of the person who placed the hold. Double-clicking on Orig will allow the user to select the office responsible for placing and/or clearing the hold.

To clear a hold, the user should change the "To" date to the current date. The user should also put a notation in the Reason field to indicate who cleared the hold (e.g., c/by John Mortensen).

Note: **DO NOT** check the *Rel* check box. If this box is checked, the hold may only be removed by the person who placed the hold.

SOAHSCH - Displays a student's high school information, including school name, graduation date, transcript date, class rank and size, percentile, and GPA.

SOATEST - Displays a student's admission index score, ACT scores, and SAT scores.

SPAIDEN - Using the Next Block feature, this form displays a student's alternate name (maiden name), addresses, and phone numbers.

SPAPERS - Displays a student's gender, date of birth, social security number, confidentiality, citizenship, ethnicity, marital status, religion, and veteran status.

Navigating Within Internet Native Banner

Advisors will receive information about navigating within Internet Native Banner (INB) when they attend a training session.

Looking up a specific student. Enter the A-Number (Student Identification Number). If you do not know the student's A-Number, you may click on the Search tool (looks like a magnifying glass). At that point, you should click on *Person Search*. This will bring up a screen in which you may enter a student's last name and first name. If you are not sure of the spelling, you may use the percentage (%) symbol as a wildcard. For example, if you were to look up John Mortensen, but were unsure of the spelling of the last name, you could enter *Morten%* for the last name and John for the first name. The bottom of the screen will prompt you what to do next. Press the F8 function key to execute the search. After finding the name you are seeking, double click in the ID field.

Term codes. The term code is a six-digit code. The first four digits represent the year, and the last two digits represent the semester (20=spring, 30=summer, 40=fall). The term codes for 2008-2009 are: **200840** for Fall 2008, **200920** for Spring 2009, **200930** for Summer 2009, and **200940** for Fall 2009.

Finding Student Specific Information in Internet Native Banner (INB)

The listing below indicates which form or screen contains each element.

Academic Standing - SHATERM

ACT Scores - SOATEST

Addresses - SPAIDEN

Admission Campus - SAAADMS

Admission Catalog Term - SAAADMS

Admission Citizenship - SAAADMS

Admission College - SAAADMS

Admission Decision - SAAADMS

Admission Degree Program - SAAADMS

Admission Index - SOATEST

Admission Residency - SAAADMS

Admission Student Type (new, continuing, etc.) - SAAADMS

Admit Term - SGASTDN

Admit Type (freshman, transfer) - SAAADMS, SGASTDN

Advanced Placement (AP) - SHATRNS

Advisor Assignments - SGAADV

Campus - SGASTDN

Citizenship - SPAPERS

Class List - SFASLST

Class Rank - SGASTDN

College - SGASTDN

Concentration - SGASTDN

Confidentiality - SPAPERS

Course Authorization - SFASRPO

Date of Birth - SPAPERS

Degree - SGASTDN

Degrees Awarded - SHADEGR

Department - SGASTDN

Earned Hours - SHATERM

Ethnicity - SPAPERS

First Term Attended - SHATERM

Gender - SPAPERS

Grade Point Average (GPA) - SHATERM

High School (school name, graduation date, transcript date, class rank and size, percentile, and GPA) - SOAHSCH

Holds - SOAHOLD

Last Term Attended - SHATERM

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Major - SGASTDN

Marital Status - SPAPERS

Minor - SGASTDN

Program - SGASTDN

Registration Audit Trail - SFASTCA

Residency - SGASTDN

SAT Scores - SOATEST

Social Security Number - SPAPERS

Student Schedule - SFAREGQ

Telephone Numbers - SPAIDEN

Term Status (active, dismissed, etc.) - SGASTDN

Transfer Course Articulation - SHATRNS

Transfer Coursework - SHATRNS

Veteran Status - SPAPERS