

Banner Student Training

Training 1

Terminology, Navigation and General Person Information

Training 1 will cover terminology, Banner pages navigation, and general person information. The document is divided into three sections covering the above topics. In order to attend any of the other trainings, you will need to attend this session.

Terminology: In order to navigate Banner, you need to know the definition of various fields. If you don't remember a field there is a way to look up a list of values (LOV). LOV will be covered in Navigation. The most common used terms are:

1. **UIN:** The University Identification Number is assigned to a student once an application is submitted in Banner. Most student pages will ask for UIN. Searching for a person with a common name can be challenging. There are millions of records in Banner. You need to start asking the student for their UIN.
2. **Term:** The term code is made up of 3 parts – Campus+ Year+ Start Month For instance Fall 2020 – 2 + 2020 +8 = 220208

Month: Spring =1, Summer = 5, and Fall = 8 so for the year 2020

Spring 2020 = 220201

Summer 2020 = 220205

Fall 2020 = 220208

3. **Level:** Students are tracked in Banner by Level. The code is Campus + Level Code. Some common student levels for UIC are:
 - a. Undergraduate: 2U Undergrad - Chicago
 - b. Graduate: 2G Graduate – Chicago
 - c. Graduate Online Programs – 2H
 - d. Professional: 2P Professional – Chicago
 - e. A complete list of level codes can be found on Banner form - STVLEVL
4. **College Code:** College codes are 2 character and start with “F” or “G” for UIC. For example - The college code for Engineering is “FQ”. A complete list of College codes can be found on the Banner form – STV COLL.
5. **Major Codes:** Major codes are assigned numbers that in most cases are shared by all three campuses. If the code is unique to a campus, the campus is listed in the description. A complete list of Major codes can be found on the Banner form – STVMAJR.
6. **Department Codes:** Department codes begin with a 2. For instance 2984 - Law. A complete list of Department codes can be found on the Banner form – STVDEPT.
7. **Program Codes:** Every student is admitted with a program code. Program codes are unique. The coding scheme for a program code is Campus + Special Type Code + College

Code + major/concentration +Degree+ special offering type (online only). In this example the second character is a zero since there are no contract programs, etc.

- a. **Example:** JD - 20FJ0385JD: JD Law – UIC
- b. **Special Degree Codes:** There are some special degree codes for students not in a program that ends in a degree. The codes are:
 - i. **NDEG:** Non Degree
 - ii. **NONE:** No Degree

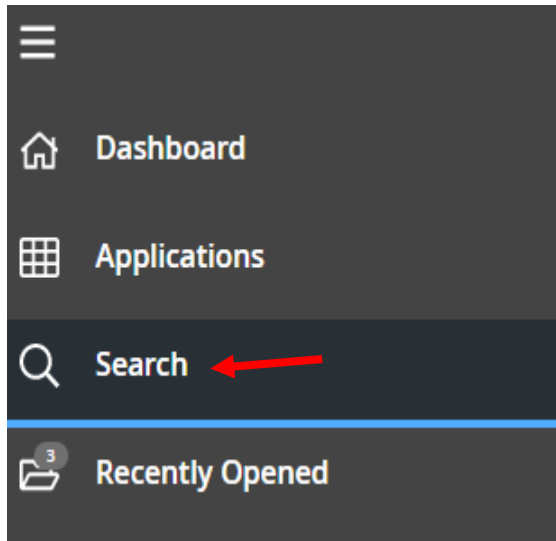
Navigation: There are different ways of navigating in Banner. This section will cover the most common Navigation Features in Banner. The features are:

1. **Search for a page:** There are several ways to search for a Banner page. When you log into the system you will land on this page:

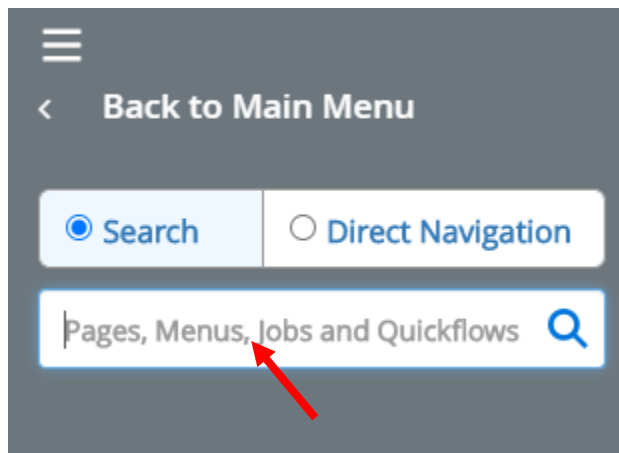


- a. You can search for a page by typing in the middle of the page. It can be the page name or words like admissions to find the page. You do not have to switch the settings to Direct Navigation. For Example: Type in Admissions or SAAADMS

b. Search for a page using the left hand menu:

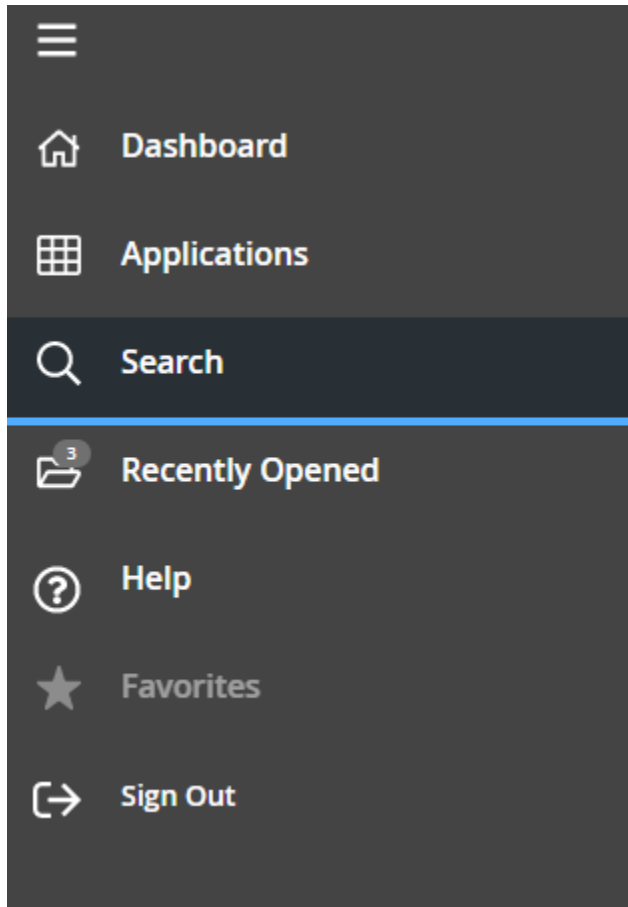


a. Click on Search:

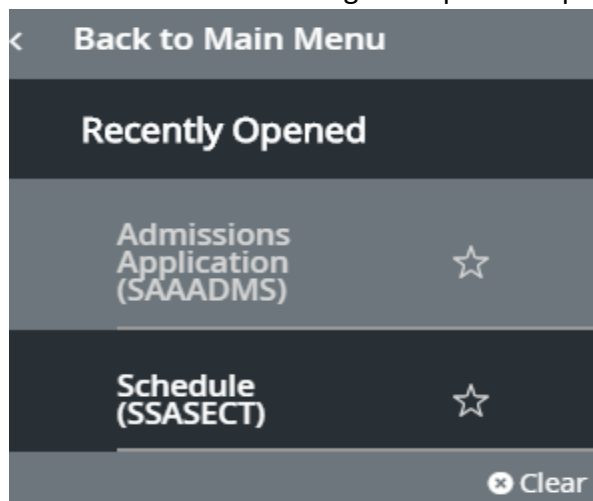


Enter in the word or page to search for. It will display a list to choose from.

2. **Side Bar Menu:** The side bar menu contains various functions that you can per page.



- a. **Dashboard:** Closes down the side bar when expanded.
- b. **Applications:** Expands out to show three options:
 - a. **Banner** – Provides a list of Pages by category. For instance Course Catalog, Class Schedule, etc.
 - b. **My Banner**- You can create your own menu of Banner pages.
 - c. **My Links** - You can add links to your web pages, etc.
- c. **Folder Icon:** You can navigate to previous pages by clicking on the folder.



- d. **Help:** The built in help for pages, keyboard shortcuts and AITS Service Desk.
 - e. **Sign Out:** Log out of the system. You will be timed out after two hours of inactivity.
3. **Navigation Hint:** Banner remembers what student you are looking at. The first time you navigate to a new page the page will populate with the current student. The next time you navigate back to the page it may display the student that you accessed the page with the first time. Please make sure you have the right student. This also applies to all key fields in a page. For instance section data is a key on some pages.
4. **Page Navigation:** There are several ways to navigate in and to additional related pages. They are:
- a. **Multiple Block/Tab Pages:** Many of the Banner pages display multiple blocks or tabs.

Course Section Information	Section Enrollment Information	Meeting Times and Instructor	Section Preferences
COURSE SECTION INFORMATION			
Subject	SOCW ... SOCIAL WORK	Campus *	200 ... Chicago
Course Number	420 ...	Status *	A ... Active
Title	Policy I: Soc Welfare Pol&Svcs	Schedule Type	LCD ... Lecture-Disc
Section *	0 ...	Instructional Method	...
Cross List	...	Integration Partner	...
CLASS TYPE			
Traditional Class			
Part of Term	1 ...	08/24/2020	12/04/2020 16
Open Learning Class			
First			
Registration Dates			
Start Dates			
Maximum Extensions	0		
CREDIT HOURS			
Credit Hours			
Credit Hours	3.000		
Credit Hours Indicator	<input checked="" type="radio"/> None <input type="radio"/> To <input type="radio"/> Or		
Billing Hours	3.000		
Billing Hours Indicator	<input checked="" type="radio"/> None <input type="radio"/> To <input type="radio"/> Or		
Contact Hours			
Contact Hours Indicator	<input checked="" type="radio"/> None <input type="radio"/> To <input type="radio"/> Or		



1. To Navigate to the next page or block within a page, click on the down arrow. You can go back to a previous block or tab by clicking the up arrow.

b. **Upper Menu Items:**



- a. **Add:** Will log you into Xtender/BDM – to add a document is you have access
- b. **Retrieve:** Will log you into Xtender/BDM to retrieve a document associated with the page if a document exists.
- c. **Related:** This is nice feature. It will display all of the related pages to the current page.

For Example SSASECT:

Q Search
Elective Attribute Pool [SSAPOOL]
Specific Section Attribute [SSASATR]
Course Section Detail [SSADETL]
Schedule Restrictions [SSARRES]
Schedule Pre-requisites [SSAPREQ]
Course Section Comments [SSATEXT]
Cross List Definitions [SSAXLST]
Schedule Exclusion Rules [SSAEXCL]
Section Calendar [SSAACCL]
Course Section Overrides [SSAOVRR]
Basic Course Information [SCACRSE]
Block Section Controls [SSABLCK]
Term Control Rules [SOATERM]
Section Syllabus Form [SSASYLB]
Open Learning Section Default Rules [SOAORUL]
Section Processing Rules [SSARULE]
Course Labor Distribution [SCACLBD]
Schedule Labor Distribution [SSACLBD]
Waitlist Automation Section Control

d. **Tools:** There is list of tools and options.

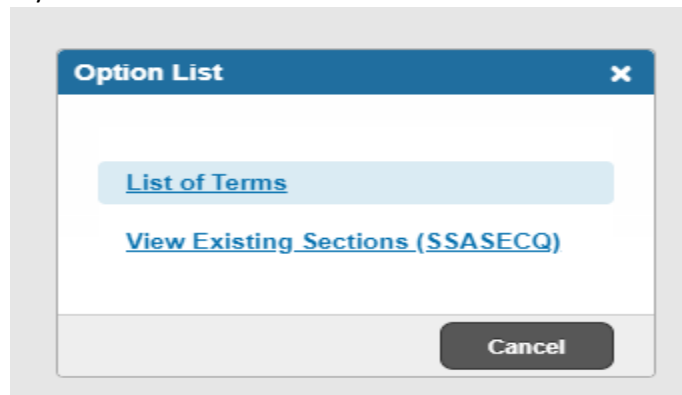
Q Search

ACTIONS	
Refresh	F5
Export	Shift+F1
Print Screenshot	Ctrl+Alt+P
Clear Record	Shift+F4
Clear Data	Shift+F5
Item Properties	
Display ID Image	
Exit Quickflow	
About Banner	
OPTIONS	
Course Section Information	
Scheduled Meeting Times	
Assigned Instructors	
Section Partition Preferences	
Section Room Attribute Preferences	
BANNER DOCUMENT MANAGEMENT	
Retrieve Documents	Alt+R
Count Matched Documents	
Add Documents	>
PAGE LAYOUT	

1. The tools are print screen, item properties etc.
 2. Options: These are specific functions that you can navigate to. In the example assigned instructors takes you to the Meeting Times and Instructor Tab.
 3. Banner Document Management (also known as BDM or Xtender): Lists all of the functions for Document Management.
 4. Page Layout: Change the layout of the page display.
 5. Page Settings: Restore the default layout.
5. **List of Values:** Many Banner pages require values to be entered as keys. You can search for the value. A SSASECT example is below:

Term: ... CRN: ...
 Subject: Course:
 Title:

- a. If you click on the three dots next to term:



1. Click on List in most cases. If you click on list of terms:

Term Code Validation (STVTERM) [X]

Criteria

Code	Description	Start Date	End Date	FinAid Yr
999999	The End of Time	01/01/2999	05/15/2999	9999
888888	Accts Receivable Generic Term	01/01/1950	05/15/2999	9999
499999	SCADETL: UIS End of Time	01/01/2999	05/15/2999	
420305	Summer 2030 - Springfield	06/01/2999	08/01/2999	2930
420301	Spring 2030 - Springfield	01/01/2999	05/01/2999	2930
420298	Fall 2029 - Springfield	09/01/2999	12/01/2999	2930
420295	Summer 2029 - Springfield	06/01/2999	08/01/2999	2829
420291	Spring 2029 - Springfield	01/01/2999	05/01/2999	2829
420288	Fall 2028 - Springfield	09/01/2999	12/01/2999	2829

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- a. It brings up the validation table. You should search with a 2% when multiple campuses are displayed. You select the term by highlighting it and clicking okay.

b. The % sign is used for wildcarding.

6. **Search Features:** In some cases when you click the three dots next to CRN, you will be presented with a search function. Using the same SSASECT example by clicking on the Search function:

The screenshot shows the 'SCHEDULE SECTION QUERY' interface. At the top, there are search filters for Term, Part of Term, Registration From, Registration To, and CRN. Below the filters is a table with columns: Term, Part of Term, Registration From, Registration To, CRN, Block Schedule, Subject, Course, Section, Section Status, Campus, Course/Section Title, Schedule Type, Instructional Method, Duration, Unit, and Lin. Below the table, there are sections for 'Enrollment' and 'Waitlist' with sub-sections for 'Maximum', 'Actual', and 'Remaining'.

- a. Entering data will bring up a list to choose from. In this case it would look like this for LAW 402 for Fall

The screenshot shows the 'SCHEDULE SECTION QUERY' interface with active filters: Term: 220208, Subject: LAW, Course: 402. The table below shows a list of search results for LAW 402 in Fall 2020. A red arrow points to the '220208' value in the 'Term' column of the first row.

Term	Part of Term	Registration From	Registration To	CRN	Block Schedule	Subject	Course	Section	Section Status	Campus	Course/Section Title	Schedule Type	Instructional Me
220208	LF			44286		LAW	402	0	C	200	LSI	LCD	
220208	LF			44354	Y	LAW	402	0	A	200	LSI	LCD	
220208	LF			44576	Y	LAW	402	0	A	200	LSI	LCD	
220208	LF			44577	Y	LAW	402	0	A	200	LSI	LCD	
220208	LF			44578	Y	LAW	402	0	A	200	LSI	LCD	
220208	LF			44579	Y	LAW	402	0	A	200	LSI	LCD	
220208	LF			44580	Y	LAW	402	0	A	200	LSI	LCD	
220208	LF			44581		LAW	402	0	A	200	LSI	LCD	
220208	LF			44582	Y	LAW	402	0	A	200	LSI	LCD	
220208	LF			44583	Y	LAW	402	0	A	200	LSI	LCD	

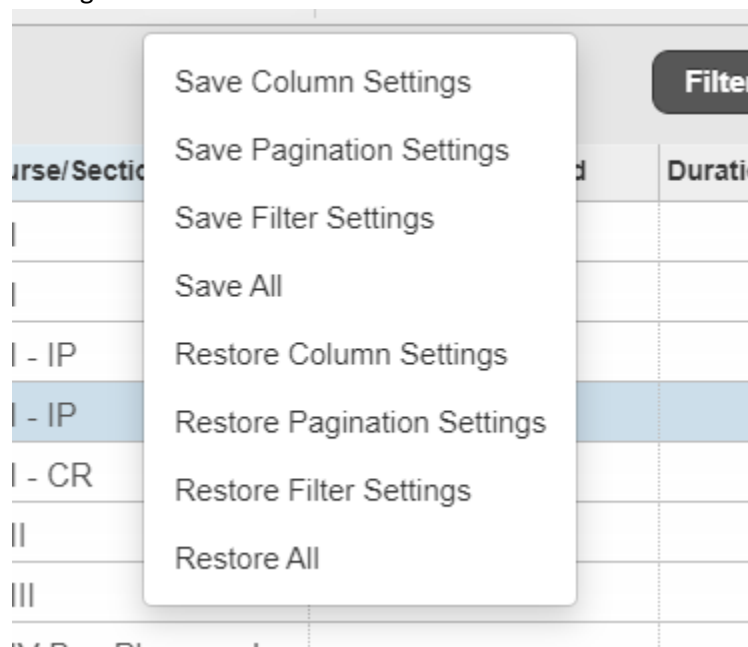
- b. Double click in the first value in column one of the row you want to select and the value will be put into the field on the page.

The screenshot shows the search results form with the following fields: Term: 220208, Subject: LAW, Title: LSI, and Course: 402. The CRN field is populated with the value 44286, which was selected from the search results. A red arrow points to the CRN field. There are also buttons for 'Create CRN' and 'Copy CRN'.

- 7. Page Settings:** The display on some Banner pages has many columns or records which require you to scroll or click to go through multiple pages. You can set by page, the order of columns and the number of records. This information can be saved. It works like an Excel Spreadsheet.

Term	Part of Term	Registration From	Registration To	CRN	Block Schedule	Subject	Course	Section	Section Status	Campus	Course/Section Title	Schedule Type
220198	1			44354		LAW	402	0	A	200	LSI	LCD
220198	1			44286		LAW	402	0	A	200	LSI	LCD
220198	1			44358		LAW	403	0	A	200	LSI - IP	LCD
220198	1			44290		LAW	403	0	A	200	LSI - IP	LCD
220198	1			44356		LAW	404	0	A	200	LSI - CR	LCD
220198	1			44360		LAW	412	0	A	200	LSII	LCD
220198	1			44363		LAW	422	0	A	200	LSIII	LCD
220198	1			44365		LAW	430	0	A	200	LSIV Bus Plann and...	LCD
220198	1			44376		LAW	436	0	A	200	LSIV Drafting RE	LCD
220198	1			44371		LAW	437	0	A	200	LSIV Drafting Gen ...	LCD

- There are ten pages of data and you need to scroll to the right to see the remaining data.
- Change the number of records per page by clicking on the down arrow and select the number per page.
- Hide columns by collapsing the column.
- Move columns by using drag and drop.
- Click on Settings to save or restore your page settings. You can also store your filter settings.

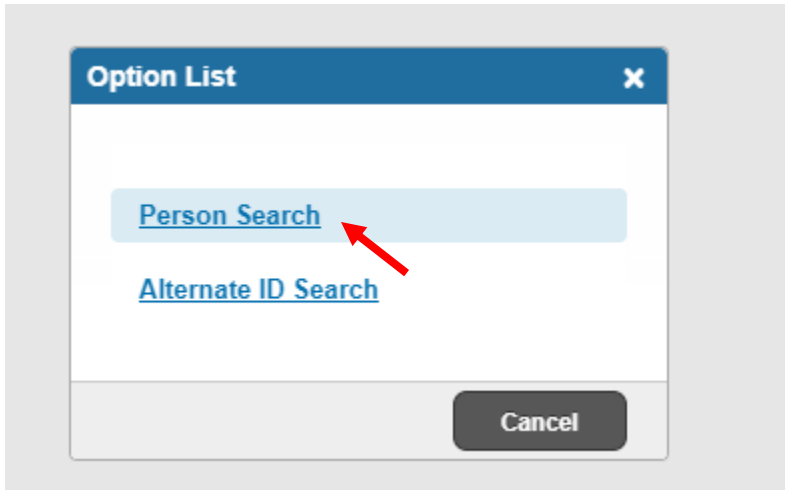


General Person Information: There are millions of records in Banner. There are two main pages to search for a person on Banner, SOAIDEN and GUIRCH. You will automatically go to the search by clicking on the three dots when asked for an ID (UIN. For example on the SPAPERS page.

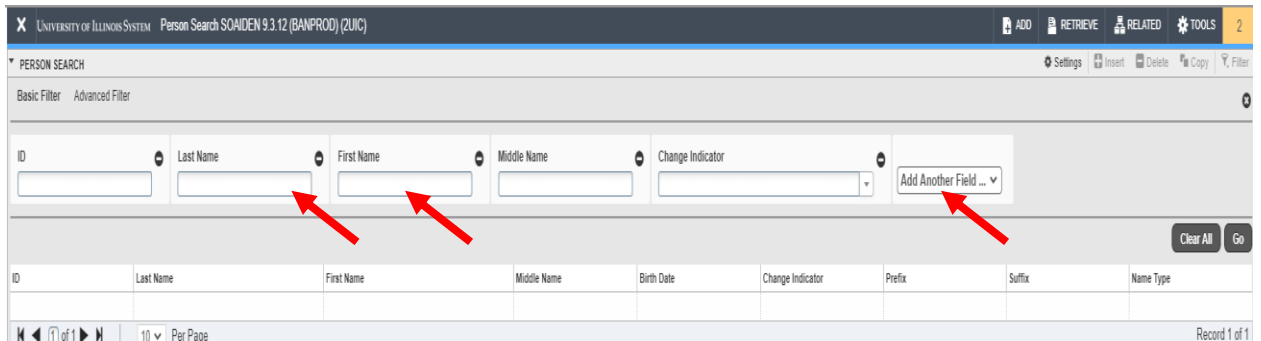


Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your

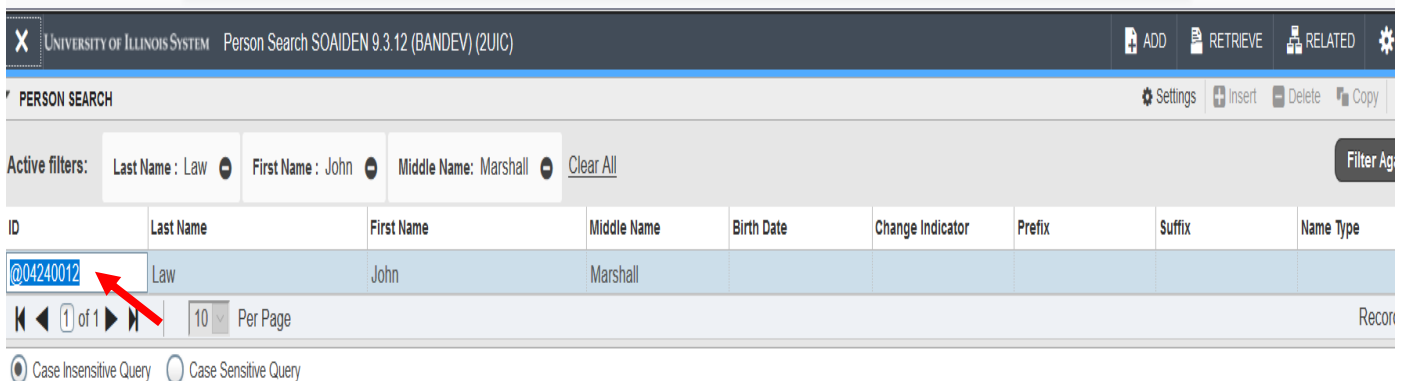
1. Click on the three dots.



2. Click on Person Search



- a. Enter in the name information or select "Add Another Field"
- b. Click Go to Search



- c. Double click on the first column of the record to select.

ID: ... Law, John M. Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

d. Click Go to go to the page.

B. GUISRCH: There is another way to search for student, especially if you have a common name. The page is GUISRCH.

UNIVERSITY OF ILLINOIS SYSTEM General Search GUISRCH 9.3.15 (BANDEV) (2UIC)
 ADD RETRIEVE RELATED TOOLS

Additional ID: E-mail: Go
 Country Code: Area Code:
 Phone Number:

Enter one search criteria (Additional Id,E-Mail,Telephone) and press Press GO to list matching records

- a. This is used if you have an additional field id, email or telephone number for the student. The most common search is email address.
- b. Enter Email Address and press Click Go.

UNIVERSITY OF ILLINOIS SYSTEM General Search GUISRCH 9.3.15 (BANDEV) (2UIC)
 ADD RETRIEVE

Additional ID: E-mail: Country Code: Area Code: Phone Number:

Enter one search criteria (Additional Id,E-Mail,Telephone) and press Press GO to list matching records

GENERAL SEARCH Settings Insert De

ID	First Name	Middle Name	Last Name	Prefix	Suffix	Birth Date	E-mail Code	E-mail Address
<input type="text" value="@04240012"/>	John	Marshall	Law				PERS	Jmarshall676@gmail.com

1 of 1 10 Per Page

c. Double Click in the first column to select the student.

ID: ... Law, John M. Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

c. Click "Go" to access the SPAPERS page.

The screenshot shows the SPAPERS interface for a person with ID @04240012, John M. Law. The page is titled "Biographical" and "GENERAL PERSON". It contains several sections for data entry and viewing:

- Gender:** Male (selected), Female, Not Available.
- SSN/SIN/TIN:** Field with checkboxes for Confidential and Deceased.
- Birth Date:** 01/01/2000, Age: 20.
- Deceased Date:** Field.
- Citizenship:** US (selected), Citizen.
- Ethnicity and Race:** Confirmed Date: 06/09/2020.
- Marital Status:** Field.
- Religion:** Field.
- Legacy:** Field.
- Veteran:** Not a Veteran (selected).
- Classification:** Field.
- Date of Discharge:** Field.
- Armed Forces Service Medal Indicator:** Field.
- Disabled Veteran:** Checked.
- New Ethnicity:** Not Hispanic or Latino (selected).
- Ethnicity and Race Confirmed:** Checked.

Below the biographical section is the "RACE DETAILS" section, showing a table with one entry: Race 5, Race Description White. The table has 1 of 1 records and 3 items per page.

d. SPAPERS is used by very few people. It is only used to view SSN. All the information on this page can be viewed in SPAIDEN. Therefore, we will look at SPAIDEN.

C. **SPAIDEN:** SPAIDEN has all of the biographical information about a person. The SPAIDEN page looks like:

The screenshot shows the SPAIDEN interface for a person with ID @04240012, John M. Law. The page is titled "General Person Identification SPAIDEN 9.3.18 UI_9124 (BANDEV) (ZUIC)". It features a navigation menu with tabs: Current Identification (selected), Alternate Identification, Address, Telephone, Biographical, E-mail, Emergency Contact, and Additional Identification. A red arrow points to the "Current Identification" tab.

The main content area is divided into sections:

- IDENTIFICATION:** ID @04240012, Name Type field.
- PERSON:** Last Name: Law, First Name: John, Middle Name: Marshall, Prefix, Suffix, Preferred First Name, Full Legal Name.
- NON-PERSON:** Name field.
- ID AND NAME SOURCE:** Last Update, Origin: GOAMTCH, Original Creation, User: MIKEK, Create Date: 06/09/2020.

1. There are several tabs on this page which we will review. The main tab shows name information. Click on Address

ID: @04240012 Law, John M.

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

ADDRESS INFORMATION Skip Address Verify Address Verified Settings

From Date: 06/09/2020	County: 031 Cook
To Date:	Nation:
Address Type: MA Mailing Address	Telephone Type: MA Mailing Address Phone
Sequence Number: 1	Area Code:
Street Line 1: 1200 W Harrison St	Phone Number:
Street Line 2:	Extension:
Street Line 3:	<input type="checkbox"/> Inactivate Address
City: Chicago	Source:
State or Province: IL Illinois	Delivery Point: 99
ZIP or Postal Code: 60607-3320	Correction Digit: 5
	Carrier Route: C040

1 of 2 Per Page

- a. Check to see if there are multiple addresses. The number is at the bottom of the page. You need to check the "From and To Date" as well as the Inactive Address Indicator.
- b. **Telephone Tab:** Displays all of the telephone numbers on file:

ID: @04240012 Law, John M.

Current Identification Alternate Identification Address **Telephone** Biographical E-mail Emergency Contact Additional Identification

TELEPHONE INFORMATION Settings

Telephone Type: CELL Cellular Phone	<input checked="" type="checkbox"/> Primary
Area Code: 815	<input type="checkbox"/> Unlisted
Phone Number: 999-9999	<input type="checkbox"/> Inactivate
Extension:	Comment:
International Access:	Address Type:
	Sequence:

1 of 1 Per Page

1. Make sure you check the Telephone Type and Inactive fields.
- c. **Biographical Tab:** This displays the same information as SPAPERS without the SSN field.

ID: @04240012 Law, John M.

Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

BIOGRAPHICAL INFORMATION Insert Delete Copy

Gender: <input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Not Available	Religion:
Birth Date: 01/01/2000	Legacy:
Age: 20	New Ethnicity: Not Hispanic or Latino
SSN/SIN/TIN:	<input checked="" type="checkbox"/> Ethnicity and Race Confirmed
<input type="checkbox"/> Confidential	Ethnicity and Race Confirmed Date: 06/09/2020
<input type="checkbox"/> Deceased	Veteran: Not a Veteran
Deceased Date:	Classification:
Citizenship: US Citizen	Date of Discharge:
Marital Status:	<input type="checkbox"/> Armed Forces Service Medal Indicator
	<input type="checkbox"/> Disabled Veteran

RACE INFORMATION Settings Insert

Race *	Description
5	White

1 of 1 Per Page

1. Make sure you check the confidential and deceased indicators.

- 2. Ethnicity and Race Confirmed:** This field when checked means the data has been certified by the student. There is a recertification process at the time of registration.

d. Email Address: Displays all of the email addresses.

ID: @04240012 Law, John M.

Current Identification	Alternate Identification	Address	Telephone	Biographical	E-mail	Emergency Contact	Additional Identification
E-MAIL INFORMATION							
E-mail Type	PERS ... Personal Email Address						
E-mail Address	Jmarshall676@gmail.com						
	<input type="checkbox"/> Preferred <input type="checkbox"/> Inactivate <input checked="" type="checkbox"/> Display on Web <input type="checkbox"/> URL						
Comment							
E-mail Type	UI ... University Assigned Email Address						
E-mail Address	jmarsh999@uic.edu						
	<input checked="" type="checkbox"/> Preferred <input type="checkbox"/> Inactivate <input checked="" type="checkbox"/> Display on Web <input type="checkbox"/> URL						
Comment							

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1. Make sure you look for the preferred email address. Once a student registers for their first term the preferred will always be the UI email type. There are many email address including billing, application emails by campus, etc.

e. Emergency Contact Information: If a student provides emergency contact information, it will be displayed on the tab.

ID: @04240012 Law, John M.

Current Identification	Alternate Identification	Address	Telephone	Biographical	E-mail	Emergency Contact	Additional Identification
EMERGENCY CONTACT INFORMATION							
Priority *	1						
Relationship	F ... Father						
Last Name *	Law						
First Name *	Jack						
Middle Name							
Address Type							
Street Line 1	333 East End Avenue						
Street Line 2							
Street Line 3							
City	Chicago						
State or Province	IL ... Illinois						
ZIP or Postal Code	60607 ...						
Nation							
Country Code							
Area Code	815						
Phone Number	999-9999						
Extension							

1 of 1 | 1 Per Page

f. Additional Identification: This is used to store additional ids. Example – Slate ID for undergrad students.

ID: @04240012 Law, John M.

Current Identification	Alternate Identification	Address	Telephone	Biographical	E-mail	Emergency Contact	Additional Identification
IDENTIFICATION							
ID Type	Description					Additional Identification	

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