THE UNIVERSITY *of* TENNESSEE UT

KNOXVILLE

Banner Holds

Training Manual

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What is BANNER?

What is Banner?

Banner is a software product (database) from SunGard Higher Education that integrates information from various student processes into one system. It will eventually replace the current Student Information System (SIS). The Banner system is divided into modules such as Accounts Receivable, Admissions, Registration, and Academic History. More than 1,600 institutions currently use Banner products.

Features/Added Functionality

- Accessible from anywhere
- Single sign-on for multiple applications
- Better access to reporting tools
- Mass entry processing
- Reliable prerequisite enforcement
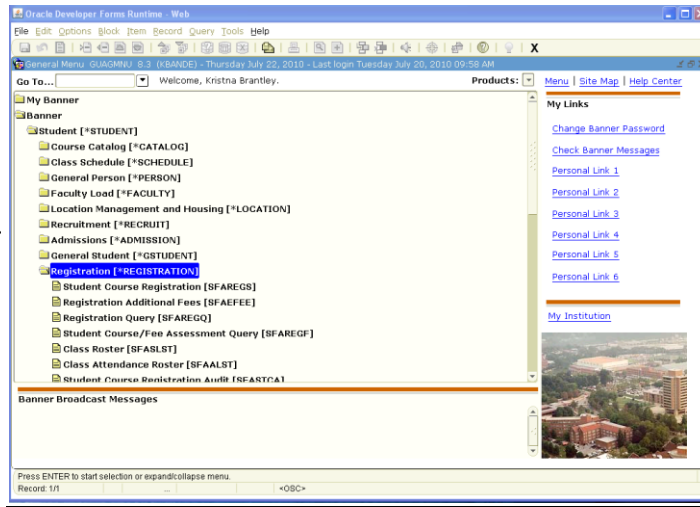- Online graduation application
- Automated withdrawal process

Banner Ports of Entry
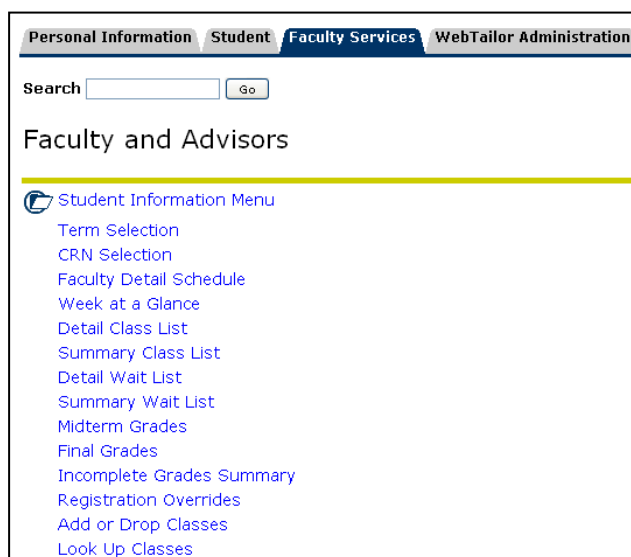
There are two ports for entry into the Banner System:

- INB (Internet Native Banner)
- SSB (Self-Service Banner).

Internet Native Banner (INB)

Internet Native Banner (INB) is the internal side of Banner used by administrative offices. It is similar in design and layout to Access
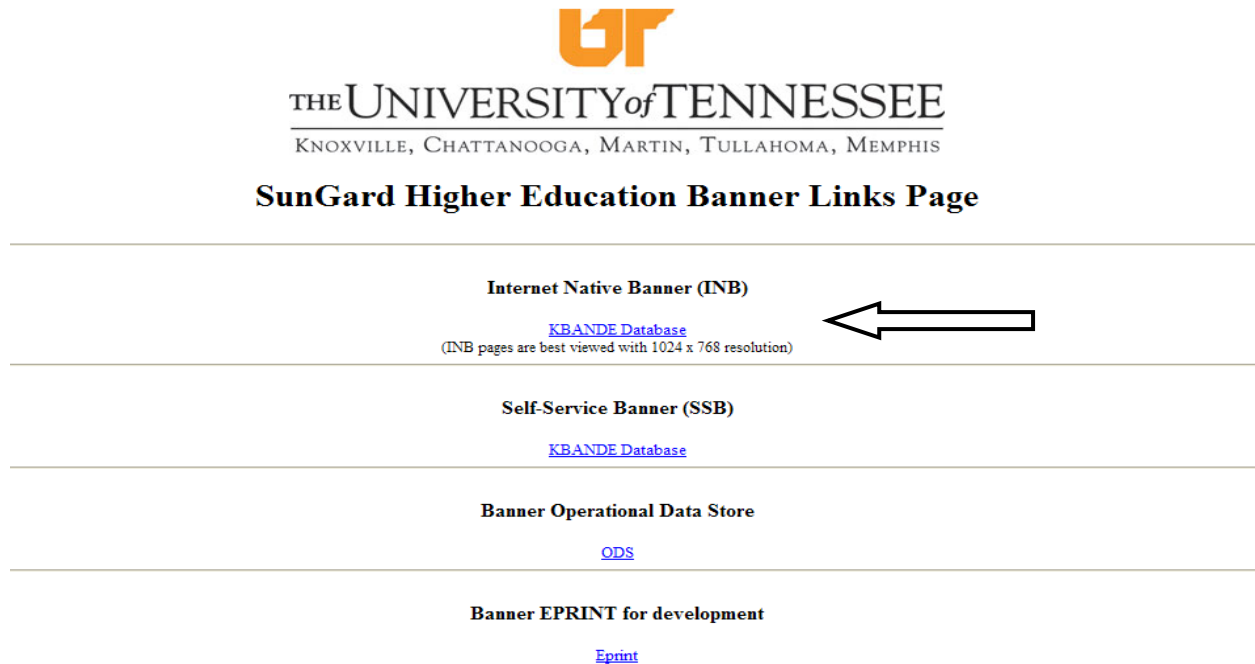

Self-Service Banner (SSB)

Self-Service Banner is a more accessible, web-based version of INB Banner used by faculty, students, and some staff. It is similar in design and layout to the UTK registration system (CPO) and the grade entry system (UT *GO*).

Logging in to Banner

Logging in to BANNER

LOG IN WITH NET ID AND PASSWORD.

1. **During training you will log in by clicking the Internet native Banner (INB) link as shown below.** (Eventually, when other components are installed the browser window will change slightly.)

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THE UNIVERSITY of TENNESSEE

KNOXVILLE, CHATTANOOGA, MARTIN, TULLAHOMA, MEMPHIS

SunGard Higher Education Banner Links Page

Internet Native Banner (INB)

KBANDE Database
(INB pages are best viewed with 1024 x 768 resolution)

Self-Service Banner (SSB)

KBANDE Database

Banner Operational Data Store

ODS

Banner EPRINT for development

Eprint

2. An additional window will open, and the Banner login box will appear.

Logon	✕
Username:	
Password:	
Database:	KBANDE
Connect	Cancel

3. **Enter your netID and password** (same one used to log into your email).

4. Click on "Connect."

5. If you have trouble logging in, contact the OIT Helpdesk (974-9900).

YOU ARE NOW IN THE BANNER SYSTEM!!!

You should now see the main menu below.
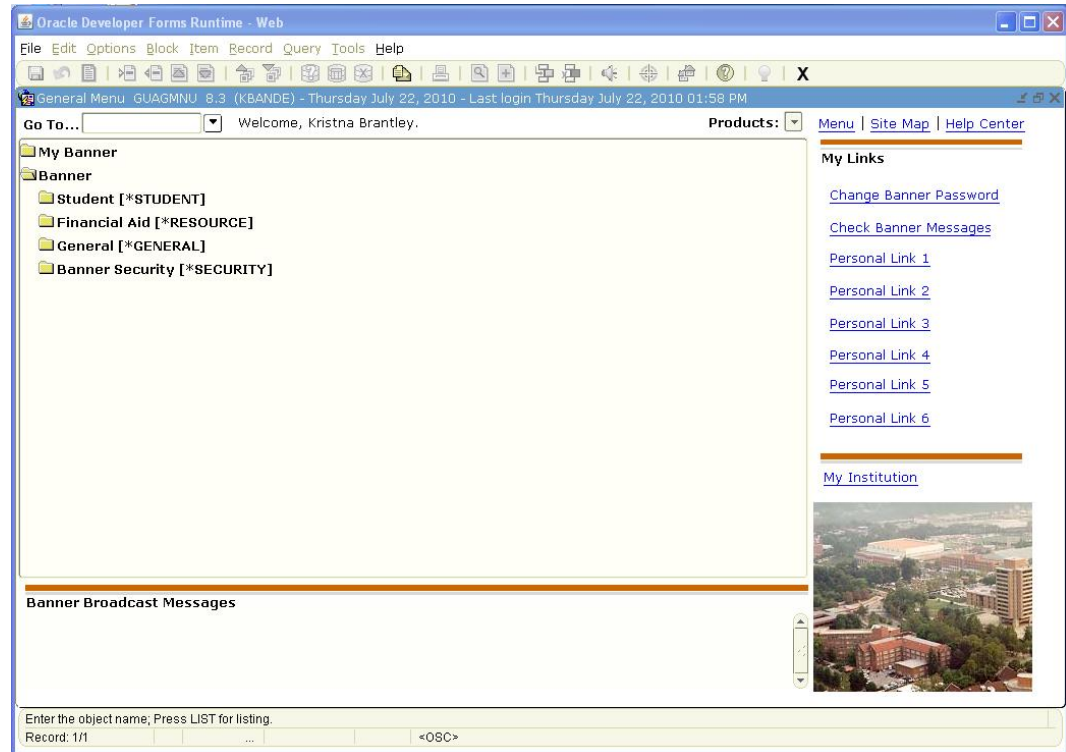
In the status bar (see below), two windows will be open: (1) "Oracle Application Server Forms Services" and (2) "Oracle Developer Forms Runtime – Web." Even though the application window looks blank, it is running an essential plug-in needed for Banner. **If either window is closed, the Banner session will be terminated.**
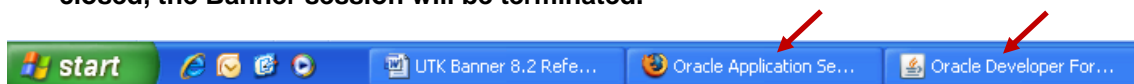
Family Education Rights & Privacy Act (FERPA)

Designed to protect the privacy of educational records; establish rights of students to inspect their records; and provide guidelines for correcting inaccurate data.

Does FERPA apply to all students?
- Yes. All students, (regardless of age), who attend or have previously attended postsecondary institutions have FERPA rights.
- 'Attending students' includes admitted students, students in residence, continuing education students, students auditing only, and distance education students. FERPA does not apply to applicants who have not been admitted to the institution.

Who is responsible for seeing that FERPA is enforced?
All members of the university community, (faculty, staff and students), who have access to student records are responsible for guarding their confidentiality.

What does FERPA guarantee students?
FERPA gives students the right to:
- inspect and review their own records;
- request amendments to their record;
- have some control over the release of personally identifiable information from their records; and
- file a complaint with the Department of Education concerning an alleged failure to comply with FERPA regulations.

How students are made aware of FERPA?
Notification at the University of Tennessee is furnished at freshmen orientation; through *Hilltopics*, Graduate and Undergraduate Catalogs; and on the FERPA and Student Privacy website: http://ferpa.utk.edu/.

What is directory information?
Directory information is student data that is not generally considered harmful if disclosed. Directory information may be disclosed UNLESS the student has invoked the FERPA right to limit disclosure. Directory information includes:

Name	Graduate or Undergraduate level
Semester (local) address	Full-time or Part-time status
Permanent address	College
NetID	Major
Email address (university-supplied)	Dates of Attendance
Telephone number	Degrees and Awards
Classification	Participation in school activities and sports
Weight and height	
Most recent previous educational institution attended	

What is not directory Information?

Social Security Number	Student ID Number
Grades	GPA (Term or Cumulative)
Student Schedule	Academic History
Academic Standing	

What is meant by "disclosure of information?"
The University is not allowed to share information, other than "Directory Information", without a student's written consent.

Can a student limit release of directory information?
Yes. Students can be excluded from directory creation or have more stringent privacy measures instituted. Students can learn more at: FERPA and Student Privacy website: http://ferpa.utk.edu/ or through Student Data Resources, 218 Student Services Building, (865) 974-2108.

How do I know if a student has asked that no information be released?
Look for the words "Privacy Requested" printed at the top of the academic history and on Banner forms accessible by departmental personnel in colleges and administrative offices.

Special note to classroom instructors:
University faculty and staff with a legitimate educational interest **do** *have the right to access information about the student's academic status and progress (for example, academic advisors or counselors in the Early Alert Program).*
DO NOT:
- Use student IDs or social security numbers in a public posting of grades
- Link the names of students with their IDs in any public manner
- Leave tests or papers for others to review (including collecting or distributing assignments in open mailboxes or other public places)
- Circulate a printed class roll listing student ID numbers or grades as an attendance roster
- Post individual student record information on a public website
- Discuss the progress/grades of any student with anyone outside of the University without written consent of the student (including parents/guardians)
- Provide anyone with lists of students enrolled in your classes for any commercial purpose
- Provide anyone with a student schedule or academic history or assist anyone other than UT employees in finding a student on campus
- Leave computers on with student information accessible

Which requests should be forwarded to the Office of the University Registrar?
- Requests for transcripts - only the Office of the University Registrar can generate an official transcript
- Certification requests - verification of enrollment for lenders, health insurance, good student car insurance discount forms
- Questions regarding the academic record of any student

Where can I find more information about FERPA?
American Assn of Collegiate Registrars & Admissions Officers: http://www.aacrao.org/compliance/ferpa/
FERPA and Student Privacy website: http://ferpa.utk.edu/.

Concerns or Questions:
      Monique Anderson, Associate Dean of Enrollment Services and University Registrar
      FERPA Compliance Officer
      209 Student Services Building
      Knoxville, TN 37996-0200

BANNER BASICS

Ways to access a form

One way to access a form is to <u>find the form in the main menu</u>:

When accessing forms from the Main Menu they are displayed as a hierarchy. You can expand and collapse content by clicking on the folders. If you do not have permission to access certain forms on a product menu then you will not see those forms.
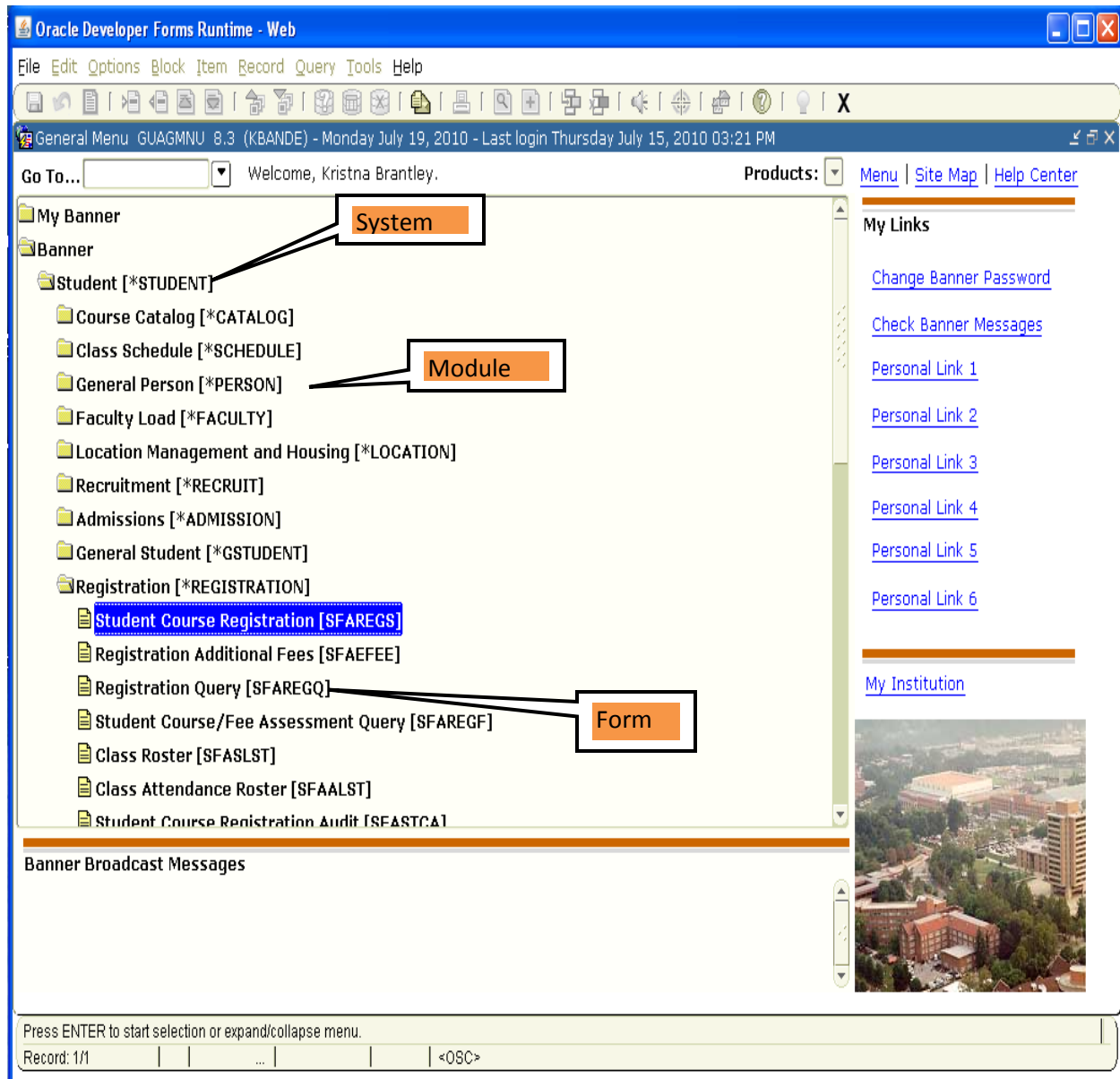
Another way to access a form is to type the name of the form in the <u>Direct Access</u> field:

In the Direct Access field you can <u>enter the 7 character name of the form</u> directly. See page 36 for more information on "What does a form name mean".
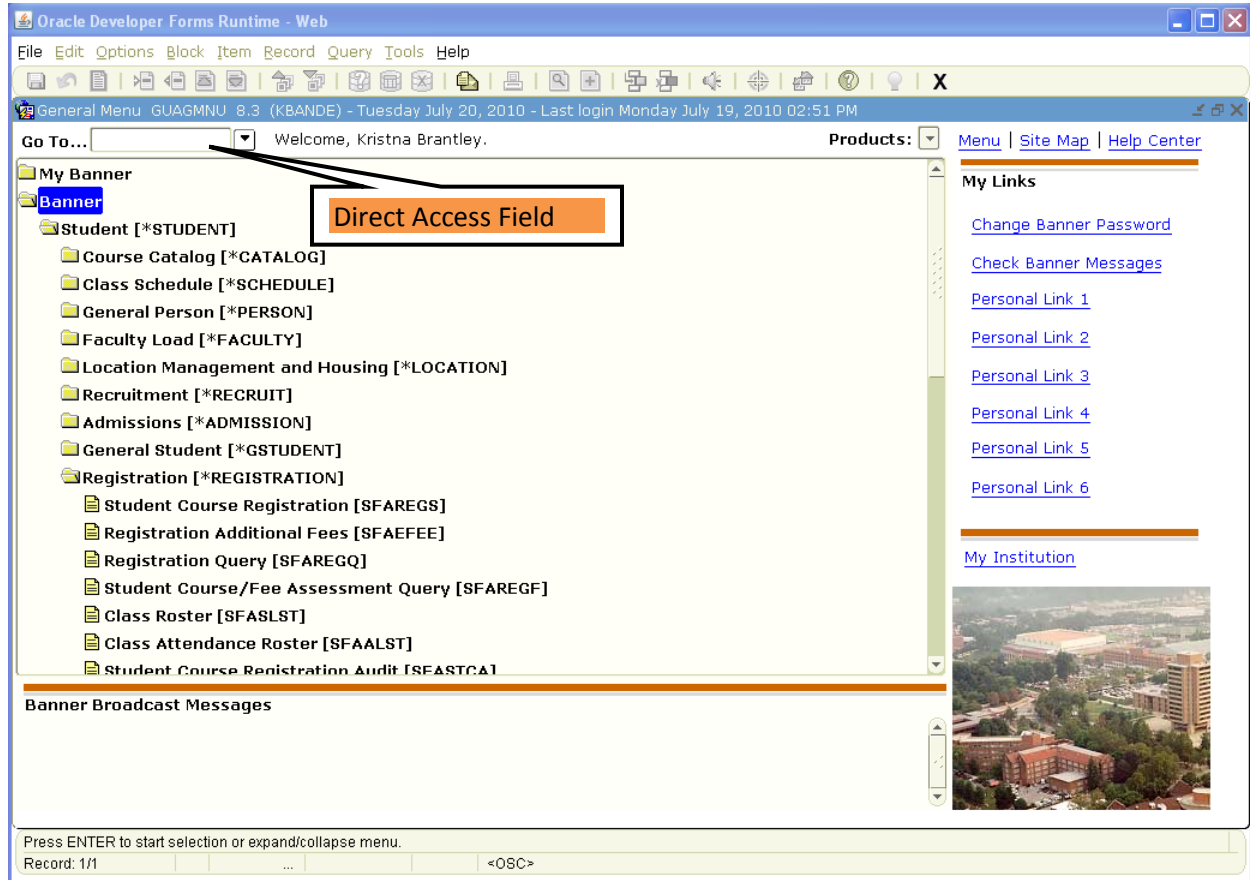
What is a form?

A form is an online document where you can enter and look up information in your database. It is comparable to a screen in SIS+.

Parts of a form

Forms are set up in blocks

To move down a block, Ctrl + Page Down or click the next block icon. To move up a block, Ctrl + Page Up or click the previous block icon.

To roll back to the Key Block, click the Rollback icon.

Tab to move from field to field within a block.

Key Block

The very top part of the form is called a **Key Block**. This is where you will enter the Banner number of the person you are looking up. All forms have a key block. Notice the rest of the form is divided into what looks like blocks. A **block** is a section of the form that contains related information.

Fields

A **field** is an area on a form where you can enter, query, change, and display specific information. Some fields in Banner allow you to type directly into the space provided to populate the data. However, many other fields only accept codes from a defined **List of Values (LOV).**

You can display the list of values for the specific field in several ways:
1. Click the **down arrow** beside the field

2. Double-click in the field itself

3. Press F9

4. Double-click on the desired value and it will be inserted into the field for you.
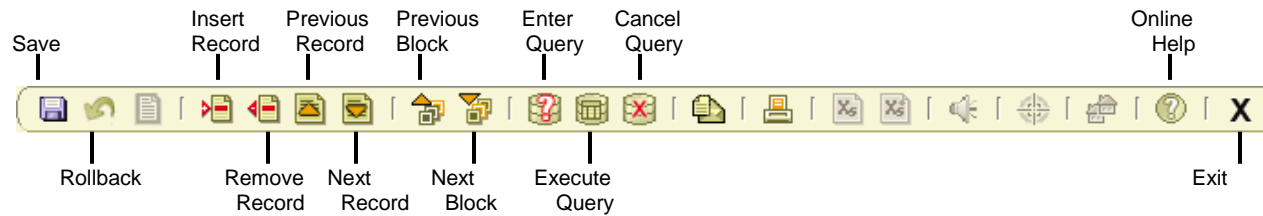
Moving from Block to Block

There are a few methods you can use to navigate from block to block within a form:

1) Select the **Next Block** or **Previous Block** icons from the Toolbar

2) Block > Next or Previous

3) CTRL + PAGE DOWN or PAGE UP

4) Click on the Tab you want to view

Auto Hint / Status Line

The **Auto Hint** line is the grey line at the bottom of the screen. This is where the system will display error, processing and help messages. If Banner doesn't respond to your commands, check this line for instructions for how to proceed. Options available at any given time on a form or hints for correcting an error will be displayed here, so this line is one of the most important bars of the Banner form. The **Status Line** is also displayed at the bottom of a form and provides information about the number of records displayed and whether all records have been displayed. Make sure you use the scroll bar to view all possible records on a page before moving on.

Quick Reference Guide to Banner Keyboard Commands

Save · Insert Record · Previous Record · Previous Block · Enter Query · Cancel Query · Online Help

Rollback · Remove Record · Next Record · Next Block · Execute Query · Exit

Function	Toolbar Icon	Menu Option	Keyboard
Next Record		Record/Next	↓
Previous Record		Record/Previous	↑
Delete Record		Record/Remove	Shift+[F6]
Insert Record		Record/Insert	[F6]
Next Block		Block/Next	Ctrl+Page Down
Previous Block		Block/Previous	Ctrl+Page Up
Enter Query		Query/Enter	[F7]
Execute Query		Query/Execute	[F8]
Cancel Query		Query/Cancel	Ctrl+Q
Rollback		File/Rollback	Shift+[F7]
Save (Commit)		File/Save	[F10]
Next Field		Item/Next	Tab
Previous Field		Item/Previous	Shift+Tab
Exit	X	File/Exit	Ctrl+Q

Icons

Save · Rollback · Select · Insert Record · Delete Record · Previous Record · Next Record · Previous Block · Next Block · Enter Query · Execute Query · Cancel Query · View/Send Messages · Print · Exit

Working with Holds in BANNER

In order to view your business profile, insert STVORIG in the go to field. This form defines the business profile associated with the hold code on STVHLDD.

Code Validation STVORIG 8.0 (KBANDE)

Code	Description	Activity Date
AD	Admissions Office	27-MAY-2010
AF	Air Force R O T C	27-MAY-2010
AG	Agriculture	27-MAY-2010
AQ	Aquatic Center	27-MAY-2010
AT	Art	27-MAY-2010
ATH	Athletic Department	06-AUG-2010
BA	Business Adm	27-MAY-2010
BANR	Banner Interface	28-JUL-2010
BN	Band Department	27-MAY-2010
BR	Bursars Office	27-MAY-2010
BS	Bookstore	27-MAY-2010
CD	Child Development Lab	27-MAY-2010
CH	Chemistry Department	27-MAY-2010
CO	Correspondence Office	27-MAY-2010
DB	Disability Services	27-MAY-2010
DEP	PERNR associated wth Dependent	17-AUG-2010
ED	Education	27-MAY-2010
EH	Educ/Human Ecology	13-AUG-2010
ES	Evening School Office	27-MAY-2010
FA	Financial Aid Office	27-MAY-2010
FR	Fraternity Affairs Office	27-MAY-2010
FS	Food Services	30-JUL-2010
GS	Graduate School	27-MAY-2010

<OSC>

File Edit Options Block Item Record Query Tools Help

Originator Code Validation STVORIG 8.0 (KBANDE)

Code	Description	Activity Date
HS	Student Health Clinic	27-MAY-2010
HU	Human Ecology	27-MAY-2010
IE	International Educ	27-MAY-2010
IRIS	IRIS	28-JUL-2010
IS	Arts & Sciences Advising	27-MAY-2010
LA	Law Admissions	27-MAY-2010
LI	Library	27-MAY-2010
LL	Law Library	27-MAY-2010
MA	Men's Athletics	27-MAY-2010
MS	Military Science	27-MAY-2010
MU	Music Department	27-MAY-2010
MWA	Athletic Department	03-AUG-2010
OR	Orientation Office	27-MAY-2010
OT	Orit Business Office	27-MAY-2010
PS	Parking Services	27-MAY-2010
RA	Readmissions Office	27-MAY-2010
RH	Residence Halls	27-MAY-2010
RO	Registars Office	27-MAY-2010
RP	Rental Properties	27-MAY-2010
SC	Student Conduct	27-MAY-2010
SL	Student Loans Office	27-MAY-2010
SP	Student Publications	27-MAY-2010
SPO	PERNR associated withSpouse	17-AUG-2010

Originator code.
Record: 46/55   <OSC>

Type in the go to field STVHLDD. This form identifies the hold type code referenced in the Academic History Module and is cross-referenced by the Hold Form (SOAHOLD) and Hold Query-Only Form.

Code	Description	Registration	Enrollment Verification	Transcript	Graduation	Grade	A/R	Application	Compliance	Voice Message
A1	Admissions-UG	✔	☐	✔	☐	✔	☐	☐	☐	
A2	Needs College Tscp 8659742	✔	☐	✔	☐	✔	☐	☐	☐	
A3	Stop File 8659742184	✔	☐	✔	☐	✔	☐	☐	☐	
A4	Needs High Sch Tscp 865974	✔	☐	✔	☐	✔	☐	☐	☐	
A5	Transient 8658742184	✔	☐	✔	☐	✔	☐	☐	☐	
A7	Cmte. on English 86597421	✔	☐	✔	☐	✔	☐	☐	☐	
A8	Owe Applic Fee 86597421	✔	☐	✔	☐	✔	☐	☐	☐	
A9	Athl Dept Camp Pay 865974	✔	☐	✔	☐	✔	☐	☐	☐	
AC	Architecture 8659743241	✔	☐	✔	☐	✔	☐	☐	☐	
AD	Admission- Intl 865974218	✔	☐	✔	☐	✔	☐	☐	☐	
AF	Air Force R.O.T.C. 8659743C	✔	☐	✔	☐	✔	☐	☐	☐	
AH	Bad Addr Mail Undlv 8659744	✔	☐	✔	☐	✔	☐	☐	☐	
AP	Art Printmaking Fee 8659743	✔	☐	✔	☐	✔	☐	☐	☐	
AQ	Art Film Processing 86597434	✔	☐	✔	☐	✔	☐	☐	☐	
AR	Accounts Receivable 865974	✔	☐	✔	☐	✔	✔	✔	✔	
AS	Stu Success Ctr Adv 865946	✔	☐	✔	☐	✔	☐	☐	☐	
AU	Arts & Sciences Adv 8659744	✔	☐	✔	☐	✔	☐	☐	☐	
B1	PEMBA 8659741771	✔	☐	✔	☐	✔	☐	☐	☐	
BA	Band Uniform 86597450	✔	☐	✔	☐	✔	☐	☐	☐	
BS	Bookstore 865974101	✔	☐	✔	☐	✔	☐	☐	☐	

<OSC>

Code	Description	Registration	Enrollment Verification	Transcript	Graduation	Grade	A/R	Application	Compliance	Voice Message
BU	College of Business 8659741	✔	☐	✔	☐	✔	☐	☐	☐	
C1	Rent-Taliwa Ct Apts 8659741	✔	☐	✔	☐	✔	☐	☐	☐	
C2	Forfeit Rnt/Tali Ct 865974187	✔	☐	✔	☐	✔	☐	☐	☐	
C3	Ret Chk Svc Chg/Tc 865974	✔	☐	✔	☐	✔	☐	☐	☐	
C4	Elec Chgs/Taliwa Ct 8659741	✔	☐	✔	☐	✔	☐	☐	☐	
C6	Maint Chgs/Taliw Ct 8659741	✔	☐	✔	☐	✔	☐	☐	☐	
CC	Collection Costs 86597444	✔	☐	✔	☐	✔	☐	☐	☐	
CD	Child Develop 86597462	✔	☐	✔	☐	✔	☐	☐	☐	
CH	Chemistry Dept 86597434	✔	☐	✔	☐	✔	☐	☐	☐	
CK	Clicker Project 865974647	✔	☐	✔	☐	✔	☐	☐	☐	
CL	Curriculum Lab 86597481	✔	☐	✔	☐	✔	☐	☐	☐	
CN	Casnr Acad Rev Advi 865974	✔	☐	✔	☐	✔	☐	☐	☐	
CO	RC-Ind Study 86597451	✔	☐	✔	☐	✔	☐	☐	☐	
CS	CSA Fees 865974449	✔	☐	✔	☐	✔	☐	☐	☐	
CY	Stu Ornt Leadsh De 8659742	✔	☐	✔	☐	✔	☐	☐	☐	
D	Student Conduct 8659743	✔	☐	✔	☐	✔	☐	☐	☐	
D1	Disciplinary 8659743171	✔	☐	✔	☐	✔	☐	☐	☐	
D2	Dismissal 8659743171	✔	☐	✔	☐	✔	☐	☐	☐	
DA	Academic Dismissal 8659742	✔	☐	✔	☐	✔	☐	☐	☐	
DB	Disability Serv 8659746087	✔	☐	☐	☐	☐	☐	☐	☐	

In order to continue to look at the description continue to either use the bar on the right hand side or you may use the next record. By using the next record icon you are going to go down one value at a time.

As of 8/6/10, STVHLDD – HOLD CODES IN BANNER WITH BUSINESS PROFILES ASSIGNED FOR FGAC: You can see that multiple hold codes can be associated a Business Profile. In the example below, holds A1-PA are assigned to the Admissions Office Business Profile. This means that staff assigned to the AD Business Profile can only add and remove holds A1 – PA.

Code	Description	Business Profile Group	Bus Profile Code		
A1	Admissions-UG	Admissions Office	AD		
A2	Needs College Tscp 8659742184	Admissions Office	AD		
A3	Stop File 8659742184	Admissions Office	AD		
A4	Needs High Sch Tscp 8659742184	Admissions Office	AD		
A5	Transient 8658742184	Admissions Office	AD		
A7	Cmte. on English 8659742184	Admissions Office	AD		
A8	Owe Applic Fee 8659742184	Admissions Office	AD		
HD	Reg Hs Deficiency 8659742101	Admissions Office	AD		
PA	Provisional Admission 8659742184	Admissions Office	AD		
CN	Casnr Acad Rev Advi 8659747303	Ag Readmissions	AG		
ME	Military Property 8659745371	Air Force	AF	Add Business Profile	
MS	Military Science 8659745371	Air Force	AF		
AU	Arts & Sciences Adv 8659744481	Arts & Sci Advising	IS		
A9	Athl Dept Camp Pay 8659744664	Athletics	ATH	I combined Men & Women (MA & WA)	
L0	Lady Vol-Basketball 8659743871	Athletics	ATH	Add Business Profile	
L4	Lady Vol-Volleyball 8659743871	Athletics	ATH		
L6	Lady Vol- Softball 8659743871	Athletics	ATH		
L7	Lady Vol - Rowing 8659743871	Athletics	ATH		
LC	Lady Vol- Track 8659743871	Athletics	ATH		

LE	Lady Vol-Weight Rm 8659743871	Athletics	ATH
LK	Lady Vol-Marketing 8659743871	Athletics	ATH
LM	Lady Vol-Media Rel 8659743871	Athletics	ATH
LN	Lady Vols - Tennis 8659743871	Athletics	ATH
LO	Lady Vols - Soccer 8659743871	Athletics	ATH
LR	Lady Vol-Train Room 8659743871	Athletics	ATH
LV	Lady Vol-Developmnt 8659743871	Athletics	ATH
LW	Lady Vol- Swimming 8659743871	Athletics	ATH
M1	Mens Ath-Football 8659741219	Athletics	ATH
M2	Mens Ath-Basketball 8659741219	Athletics	ATH
M3	Mens Ath-Baseball 8659741219	Athletics	ATH
M4	Mens Ath-Track 8659741219	Athletics	ATH
M5	Mens Ath-Golf 8659741219	Athletics	ATH
M6	Mens Ath-Tennis 8659741219	Athletics	ATH
M7	Mens Ath-Swimming 8659741219	Athletics	ATH
M8	Welfare of Athlete 8659741219	Athletics	ATH
M9	Spirit Danc For Ath 8659741219	Athletics	ATH
MV	Sports Publicity 8659741219	Athletics	ATH
BA	Band Uniform 8659745031	Band Department	BN

MU	Music Uniform Out 8659743496	Band Department	BN	
BS	Bookstore 8659741011	Bookstore	BS	
AH	Bad Addr Mail Undlv 8659744495	Bursar's Office	BR	
AR	Accounts Receivable	Bursar's Office	BR	
CD	Child Develop 8659746281	Bursar's Office	BR	(Will need detail code for charge)
CS	CSA Fees 8659744495	Bursar's Office	BR	
ES	Evening School 8659744495	Bursar's Office	BR	
FA	Emergency Loan 8659743131	Bursar's Office	BR	
FD	Knoxville Place 8659741564	Bursar's Office	BR	
KS	Knox Socwrk-Ret Chk 8659743176	Bursar's Office	BR	
LG	Legacy	Bursar's Office	BR	
NC	Non-Citizen Form 8659744495	Bursar's Office	BR	
SC	Sign Check 8659744495	Bursar's Office	BR	
SS	SS# Needed 8659744495	Bursar's Office	BR	
SW	MSSW - Bookstore 9014485625	Bursar's Office	BR	
TO	Unpaid Prior Trmchg 8659744495	Bursar's Office	BR	
UF	UTSI Student Fees 8888828874	Bursar's Office	BR	
B1	PEMBA 8659741771	Business Admin	BA	
MB	MBA Program 8659748784	Business Admin	BA	

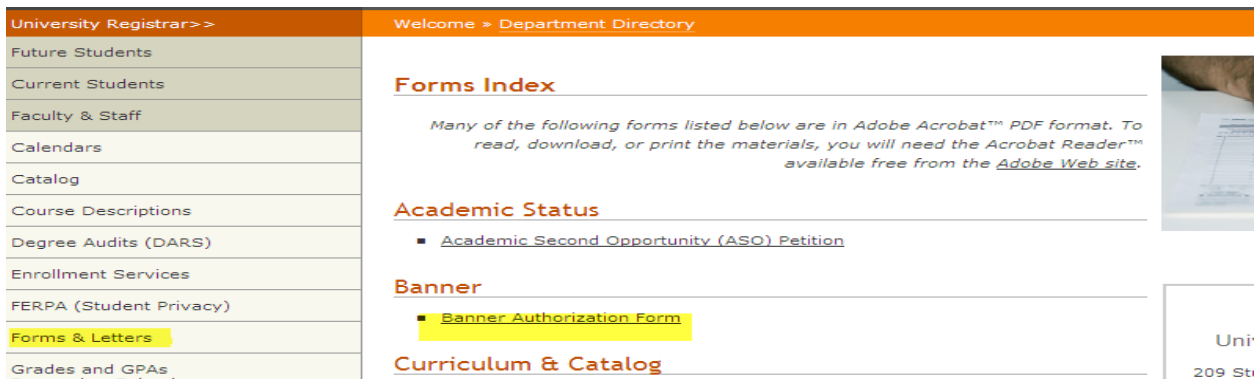|					
CH	Chemistry Dept 8659743414	Chemistry	CH	(Waiting to hear from Sharon Marshall)	
FS	Food Service 8659743430	Dining Services	FS		
DB	Disability Services 8659746087	Disability Services	DS		
ED	Ed Hth & Hs 8659748355	Educ, Health,Hum Sci	EH?	Add Business Profile	combine Education & Human Ecology
HE	Human Ecology 8659746281	Educ, Health,Hum Sci	EH?	Add Business Profile	combine Education & Human Ecology
G1	Admissions-Grad	Graduate School	GS		
G2	Grd Sch Inc Readm 8659743251	Graduate School	GS		
G3	Require Not Met 8659742475	Graduate School	GS		
G4	Grad Sch Probatin 8659742475	Graduate School	GS		
G6	Grad Sch Dismisal 8659743251	Graduate School	GS		
G7	Grad Schl Admit Probation 865974325	Graduate School	GS		
IA	Intl Admission 8659742184	Internatioanal Educ	IE		
IL	Internatl Loan 8659744453	Internatioanal Educ	IE		
LF	Law Fax Charges 8659744263	Law Admissions	LA		
L1	Law Lib Book Out 8659745906	Law Library	LL	Add Business Profile	
LL	Law Library 8659745906	Law Library	LL		
LI	Library	Library	LI		
ST	Clicker Pgm-Itc Lib 8659746470	Library	LI		
MO	Music Fee Owed 8659743496	Music Dept	MU	Add Business Profile	
OT	OIT Bus Office 8659744410	OIT Business Office	OT	Add Business Profile	

TC	Telephone Services 8659748006	OIT Business Office	OT	
V1	Vol Connect-Res Hal 8659748006	OIT Business Office	OT	
V4	Vol Connect-Ren Pro 8659748006	OIT Business Office	OT	
V7	Volvision 8659748006	OIT Business Office	OT	
CY	Stu Ornt Leadsh De 8659742435	Orientation	OR	Add Business Profile
PK	Parking	Parking Services	PS	
TR	Park Svc Ticket 8659746031	Parking Services	PS	
RA	Readmission Incompl 8659742184	Readmissions Office	RA	
RL	Released from College	Readmissions Office	RA	
DA	Academic Dismissal 8659742184	Registrar's Office	RO	
IR	Regist Indiv Req 8659742184	Registrar's Office	RO	
R1	Academic Review 1	Registrar's Office	RO	
RP	Probation	Registrar's Office	RO	
C1	Rent-Taliwa Ct Apts 8659741871	Residence Hall	RH	
C2	Forfeit Rnt/Tali Ct 8659741871	Residence Hall	RH	
C3	Ret Chk Svc Chg/Tc 8659741871	Residence Hall	RH	
C4	Elec Chgs/Taliwa Ct 8659741871	Residence Hall	RH	
C6	Maint Chgs/Taliw Ct 8659741871	Residence Hall	RH	
K1	Rent-Kingston Apts 8659741871	Residence Hall	RH	

K2	For. Rent/Kingston 8659741871	Residence Hall	RH
K3	Ret Chk Svc Chg/La 8659741871	Residence Hall	RH
K6	Maint Chgs/Kingston 8659741871	Residence Hall	RH
O1	Rent-Golf Range Apt 8659741871	Residence Hall	RH
O2	For Rent/Golf Range 8659741871	Residence Hall	RH
O3	Ret Chk Svc Chg/Ga 8659741871	Residence Hall	RH
O4	Elec Chgs/Golf Rang 8659741871	Residence Hall	RH
O6	Maint Chg/Golf Rang 8659741871	Residence Hall	RH
RH	Residence Halls 8659743411	Residence Hall	RH
S1	Rent-Sutherland Apt 8659741871	Residence Hall	RH
S2	For Rent/Sutherland 8659741871	Residence Hall	RH
S3	Ret Chk Svc Chg/Sa 8659741871	Residence Hall	RH
S4	Elec Chg/Sutherland 8659741871	Residence Hall	RH
S6	Maint Chg/Sutherlnd 8659741871	Residence Hall	RH
T1	Rent-Taliwa Ct Addt 8659741871	Residence Hall	RH
T2	For Rent/Taliwa Ct 8659741871	Residence Hall	RH
T3	Ret Chk Svc Chg/TC 8659741871	Residence Hall	RH
T4	Elec Chgs/Taliwa Ct 8659741871	Residence Hall	RH
T6	Main Chgs/Taliwa Ct 8659741871	Residence Hall	RH

Applying for Access into Banner:
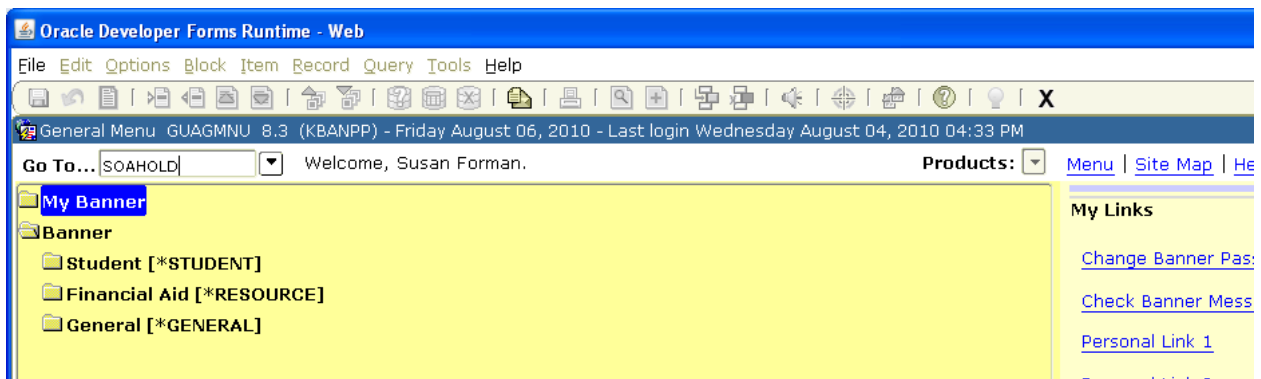
Before you can add/remove holds in Banner, you must first apply for access to Banner and the appropriate Business Profile Group. That form is forthcoming and will be available on the Registrar's Website at:

http://registrar.tennessee.edu/forms/index.shtml.

After receiving proper authorization you will log into banner. Type in the Go to field (SOAHOLD).

Or you can go through the menu path:
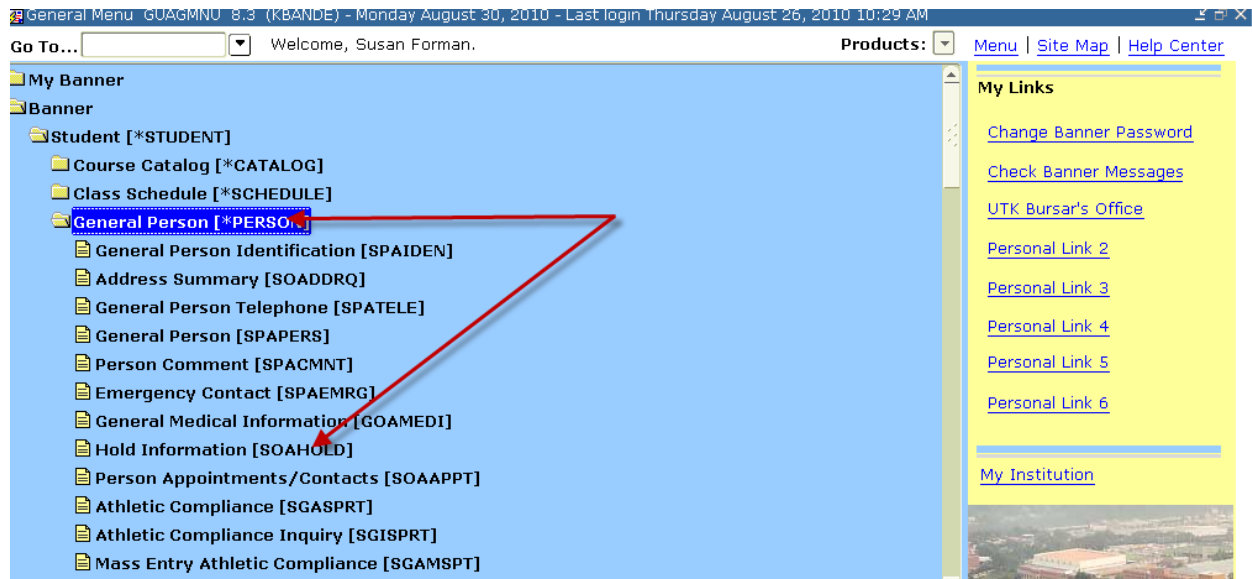
Enter the student's ID#. You can also enter the student's netid in the ID field.
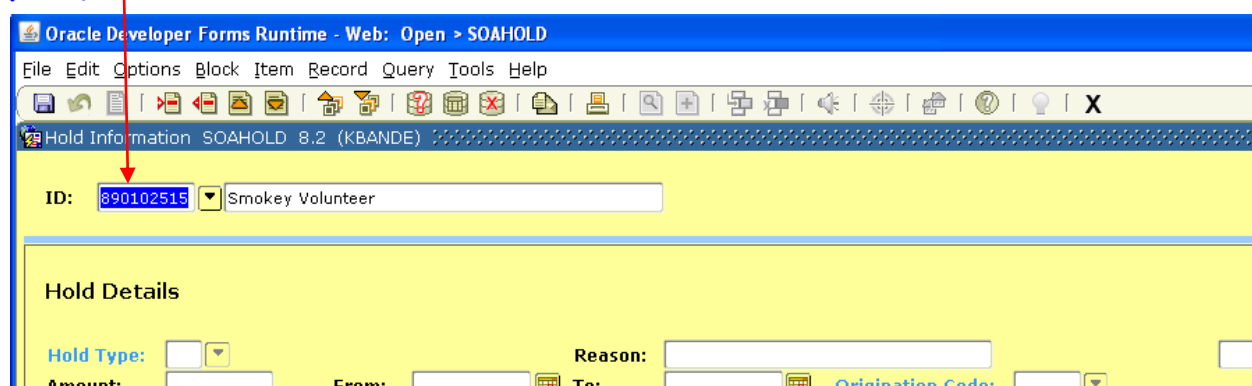
After the ID is entered, the students name will appear.

This process can be used to view, add or end-date (clear) a hold. Next perform a "Next Block" **(OR)**
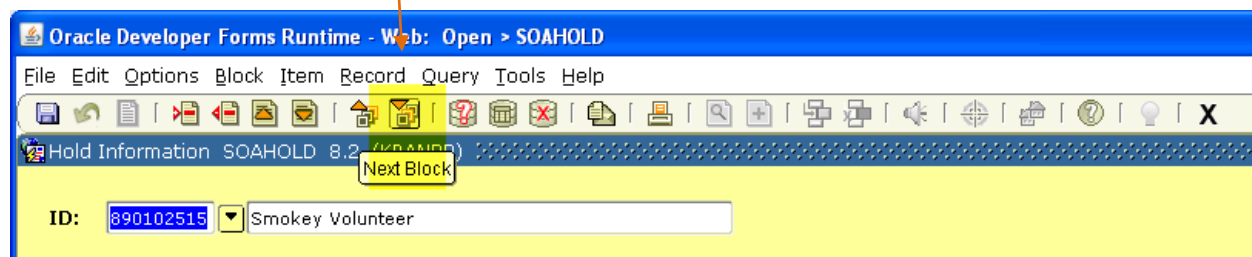
You can also do a next block by Pressing "CTRL" and the "Page Down" keys.

When you do a next block, you will be able to see any current hold that the student has. This particular hold has a Hold End Date of "31-Dec-2099" which is considered the Banner End of Time date. These will all sort to the top of the form. You can scroll down through the active and end-dated/cleared holds by using the scroll bar on the side of the form.

To enter a hold:

Enter your Hold Code as given to you by the Bursar's Office or Registrar's Office. Since Smokey Volunteer has so many holds a new record must be created. Click on the on the "Insert Record" icon or pressing "F6".

A blank line will appear in the form.

We will use a Bursar's office code for examples. I have entered "CS" which is the hold code assigned to Student Fees. Enter the hold and press Enter.

If you wish to enter a reason, you can. This is a free-form field and can be used to tie to the record in your department. If you wish to enter an amount, you may. This is an informational ONLY field and is not used for collection purposes.

The FROM: date will default in "current date" for a new hold. The TO: date will default to Banner End-of-Time, 31-Dec-2099.

The only thing you have to enter other that Hold Type code is the Origination Code. This code is the code assigned to your Business Profile. Since I am entering a hold code as an employee of the Bursar's Office, I will click on the drop-down arrow and choose Bursar's Office.

If you know the code, you can just enter the code in the box.

Once the code is selected from the table by double-clicking or entered in the box, your screen will look like this:

Important: In order for the hold to be saved you must save the entry by clicking the save icon 🖫 . This will save the hold to the student's account.

You may also save a record by pressing "F10". The way you know the student has a hold when viewing SOAHOLD is look at the "TO" date of the hold. If the date is the current date or earlier, the hold is no longer in effect.

In looking at the 2 holds above, the "BS" hold is still in effect because the "TO" date is 31-Dec-2099. The "L4" hold is cleared because the "TO" date is 8/6/10.

Holds are not removed from a student's record. The holds are end dated.

Clearing a Hold from a Student's Record:

To clear a hold or "end-date" a hold in Banner, you will go into the student's record as previously discussed. You will go to the hold code that you have been assigned and change the "TO" date to the current date.

Click on the calendar to the right of the TO date block:

Next click on the "Today" button on the Calendar.

The calendar will change to the current date:

Calendar GUACALN 8.1 (KBANDE)

AUGUST 2010

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Today   OK   Cancel
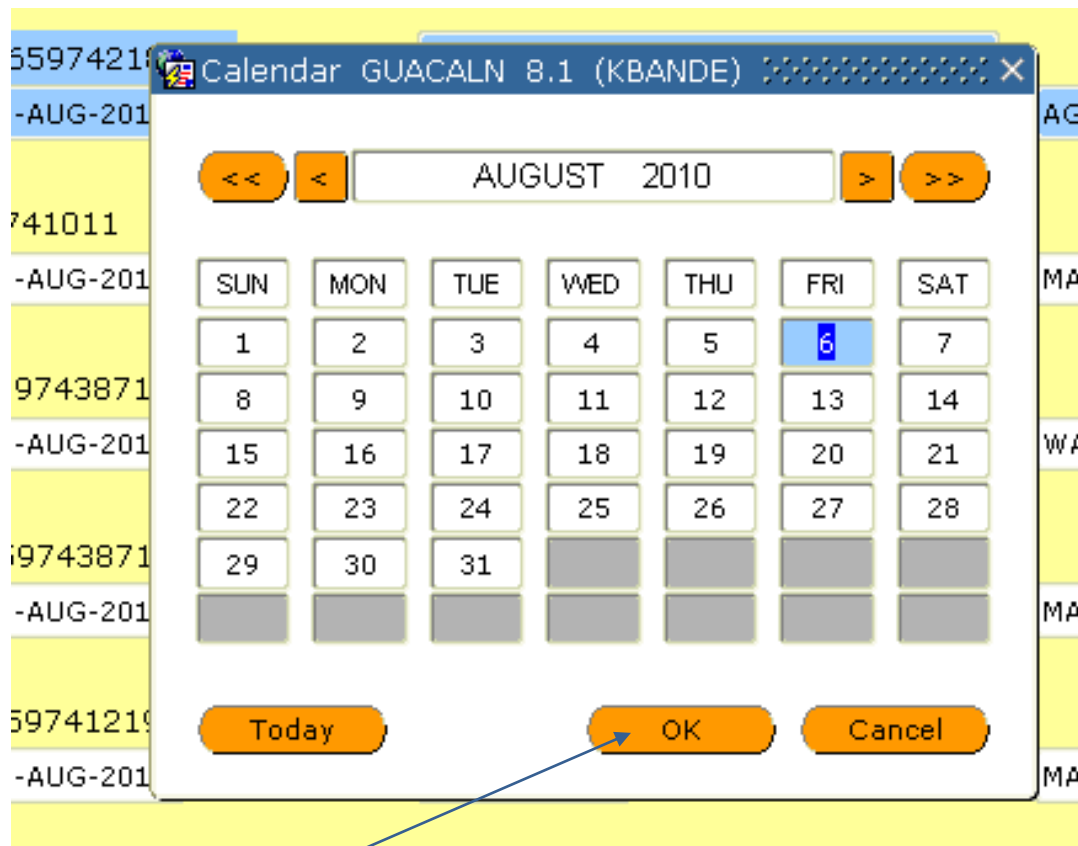
Click the "OK" button. The current date will populate the TO date block instead of the Banner End-of-Time date.

Hold Details

Hold Type: CS ▼ CSA Fees   8659744495   Reason: _____   SFORMAN

Amount: _____   From: 06-AUG-2010 🗓 To: 06-AUG-2010 🗓 Origination Code: BR ▼ Bursars Office

Now you need to save the record as previously instructed. The next person who views this record will see the "CS" code has move down in the list as shown in the next print screen.

You can exit the form by clicking on the "X" or you can "Roll Back" to the beginning of this form by clicking the "Roll Back" Button.

The red bracket shows current holds and the green bracket with the smiley face shows holds that have been cleared or end-dated.

Exiting a form

To exit the any Banner form click the X (Exit button).

To review a student's account, you may go to TSAAREV if you have the proper access. You can see if a student has active holds by looking in the hold box as highlighted below:

You may also, if you have the proper access, go to SZAAREG. Holds are indicated in the highlighted box:

Your access in Banner will be based upon your job classifications.

What does the form name mean?

Every form has an abbreviated 7 character form name. Most of the time, forms are referred to by this 7 character form name.

- Position 1 – Identifies the Banner product owning the form, report, process or table.
    - G = General
    - S = Student

- Position 2 – Identifies the application module owning the form, report, process or table. Is unique to the product identified in position 1
    - G = General
        - E = Event Management
        - J = Job Submission
        - L = Letter Generation
        - O= Overall
        - P = Purge
        - S = Security
        - T = Validation form/table
        - U = Utility
    - S = Student
        - A = Admissions
        - C = Catalog
        - E = Support Services
        - F = Registration/Fee Assessment
        - G = General Student
        - H = Grades/Academic History
        - I = Faculty Load
        - L = Location Management
        - M = CAPP
        - O= Overall
        - P = Person
        - R = Recruiting
        - S = Schedule
        - T = Validation form/table

- Position 3 – Identifies the type of form, report, process or table.
    - A = Application
    - B = Base Table
    - I – Inquire
    - P = Process
    - R – Rule Table, Repeating Table, Report or Process
    - V = Validation
    - M = Maintenance

- Position 4, 5, 6, 7 – Identifies a unique four-character code for the form, report, process or table.
    - ***IDEN = Identification
    - ***PINC = Position Incumbent
    - ***STDN = Student Relation
    - ***PERS = Person