

WS No. 1A

Banner Training Workshop

University Call Center: Using Banner for Answering Questions

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Tennessee State University

Descriptive Information

Course Title: Providing Customer Service Via. Banner

General Description and Purpose:

This workshop explains/demonstrates how the staff in the University's Call Center can assist in providing effective customer service by answering questions via the use of Banner Forms.

The purpose is to assist heavily traffic areas such as Records, Admissions, Financial Aid, and Bursar officers with telephone calls during peak periods.

Prerequisite: Access to Internet Native Banner (INB) – Inquiry to specific Banner Forms Only.

Duration of Course: 1 Hour or less

Target Audience: Designated staff from the University's Call Center

What is Banner?

Banner Student brings together administrative and academic functions to make it easier to manage data while giving students and faculty secure online access to the information they need. This is a product of SunGard Higher Education.

Logging into Internet Native Banner (INB)

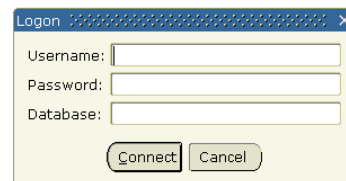
Access TSU homepage Go to: <http://orbiter.tnstate.edu:9099>

This is the Login menu: Click on Production Database [PROD]

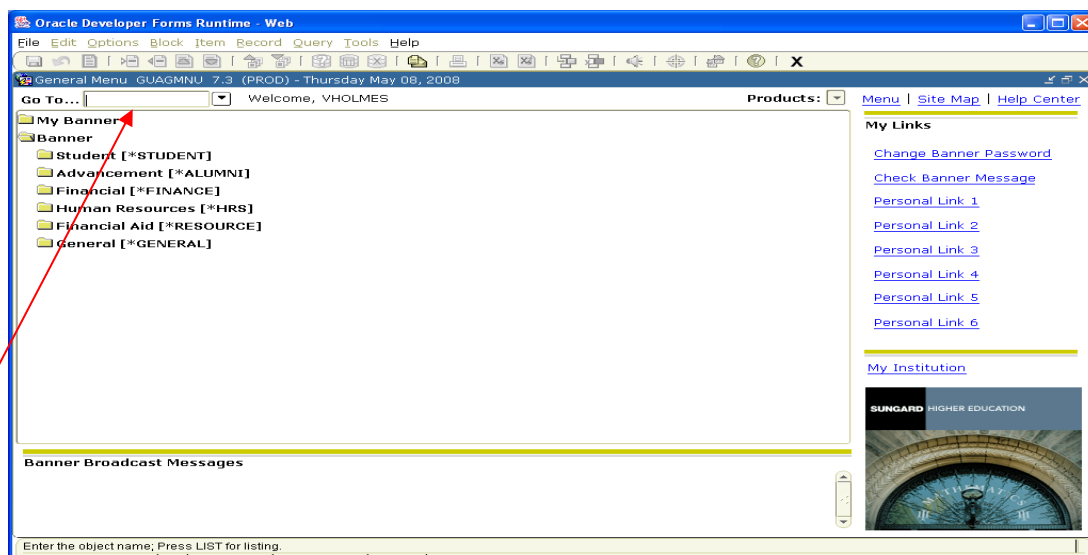


This is the logon dialog box. Enter the username and password. Click on Connect.

If this is your first time logging on, your password has been set to your T Number. Logon, change the password to something you can remember-six or more characters.



You have successfully entered BANNER LAND



Access Forms by entering your selection in the “GO TO” box and hit enter key

The Main Menu provides an overview of the menus, forms and jobs on Banner. Use the Main Menu to navigate through Banner.

Definitions of Banner Forms

SOAHOLD	Registration Holds and Clearances Form - Holds may prevent registration or graduation, or prevent the production of transcripts, enrollment verification documents, and grade mailers.
SAAACKL	Admissions Checklist Summary - The Application Checklist information is used to review and to verify receipt of items associated with an admissions application.
SZAADEF	High School Deficiencies and Developmental Studies Requirements Displays remedial and developmental courses that students are required to take based on their ACT/SAT scores.
SFAREGQ	Student Registration Form - The Registration Query Form (SFAREGQ) provides an online view of a student's schedule. The form is query-only and will display all registered courses and related information for the term.
TSAAREV	Account Detail Review Form – Is used to enter and review charge and payment information a student's account. The balance of the account and the current amount due are calculated and displayed on the last line of this form. Any changes to the account information will modify these balances.
ROARMAN	Financial Aid Record Maintenance Form - This form is used to review a student's financial aid awards.

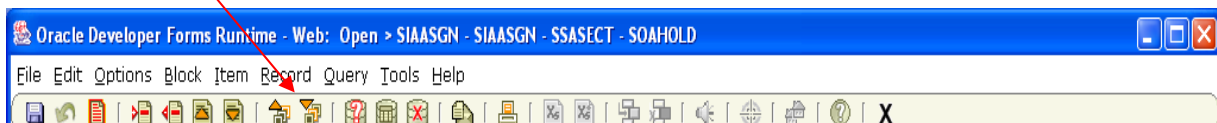
Banner Terms

Terms are defined as year/semester/code

<u>Year</u>	<u>Semester</u>	<u>Code</u>	<u>Term</u>
2008	Fall	80	200880
2009	Spring	10	200910
2009	Summer	50	200950

Accessing Information

1. Enter Form Name (see list of definitions) in the GO TO Field
2. Enter term if required
3. Enter the student's T# (T0016082) or SSN, which convert to T#, Name will appear
4. Hit next black, information will display



Inquiry to Various Forms

A. SOAHOLD

Registration Holds and Clearances Form - Holds may prevent registration or graduation, or prevent the production of transcripts, enrollment verification documents, and grade mailers.

Oracle Developer Forms Runtime - Web: Open - SIAASGN - SIAASGN - SSASECT - SOAHOLD

File Edit Options Block Item Record Query Tools Help

Hold Information SOAHOLD 7.3 (PROD)

ID: T00152822 Tamika M Word

Hold Details

Hold Type	Amount	From	To	Reason	Origination Code	Release Indicator
B1 Student has Balance		16-DEC-2008	16-DEC-2008	Student has a balance	BUSO Bursar's Office	SZAKI
D2 R/D Advisement		24-NOV-2008	15-DEC-2008			LROBARE
AR Can not register at this time		16-SEP-2008	15-DEC-2008			MDUGGER

Hold Type Code; press LIST for valid codes.

B. SAAACKL

Admissions Checklist Summary - The Application Checklist information is used to review and verify receipt of items associated with an admissions application.

Oracle Developer Forms Runtime - Web: Open - SIAASGN - SIAASGN - SSASECT - SAAACKL [Q]

File Edit Options Block Item Record Query Tools Help

ID: T00142592 Greene, Jeremy Y. Term: 200880

Application Summary

Entry Term	Decision	Status	Application Date
200880	CC Accepted	D Decision Made	05-JUN-2008

Application Number: 1 Admission Type: FR Freshman Session: Outstanding Documents: Y

Application Preference: Student Type: N Residence: 1 In State Full or Part Time:

Priority Program Level College Campus Degree Catalog Term Type: MAJOR Code: ASCI Department: ASCI

Application Checklist

Admission Request Code	Received Date	Item	Item Description	Mandatory Indicator	Print Indicator
AFEE Application Fee	27-MAY-2008	FEE PAID	25.00 check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HST1 High School Transcript				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HSTF Final High School Transcript	05-JUN-2008	430155	Bolivar Central High School	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Admission request checklist code; press LIST for valid codes.

C. SZAADEF

High School Deficiencies and Developmental Studies Requirements -

Displays remedial and developmental courses that students are required to take based on their ACT/SAT scores.

Oracle Developer Forms Runtime - Web: Open > SIAASGN - SIAASGN - SSASECT - SAAACKL [Q] - SAASUMI [Q] - SZAADEF [Q]

File Edit Options Block Item Record Query Tools Help

ID: T00142592 Greene, Jeremy Y. Update Deficiency Requirement Status
 Create A89 Delete A89
 Create DSP Delete DSP

High School Course Deficiency

Academic Deficiency Code	Description	Record Creation Source	Status	Status Date	Term	CRN	Course Subject	Course Number	Transfer Course	Comments
		M	R - Required							

Test Score Deficiency

Academic Deficiency Code	Description	Record Creation Source	Status	Status Date	Term	CRN	Course Subject	Course Number	Transfer Course	Comments
DSPM3	Intermediate Algebra	S	R - Required	17-DEC-2008						Status reset
DSPR2	Reading II	S	W - Waived	05-SEP-2008	200880	81387	DSPR	0800		Diagnostic
DSPSS	Study Skills	S	R - Required	05-JUN-2008						

Academic Deficiency Code. Press LIST for valid values.

D. SFAREGQ

Student Registration Form - The Registration Query Form (SFAREGQ)

provides an online view of a student's schedule. The form is query-only and will display all registered courses and related information for the term.

Oracle Developer Forms Runtime - Web: Open > TSAAREV - SOAHOLD - ROARMAN [Q] - SAAACKL [Q] - SZAADEF [Q] - SFAREGQ [Q]

File Edit Options Block Item Record Query Tools Help

Go To... My Institution: <http://www.sungardscet.com/> powered by SUNGARD HIGHER EDUCATION

Term: 200910 Registration From Date: Registration To Date: ID: T00152822 Word, Tamika M.

Term	CRN	Subject	Course	Section	Registration Status	CEU	Cross List	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Begin Time	End Time
200910	10298	DSPM	0700	01	RW	N									0910	1005
Part of Term:		Campus:		Start Date:		Instructional Method:										
Grading Mode:		Building:		End Date:		Instructor:										
Credit Hours:		Room:		Instructor:		Primary										
200910	10896	EDCI	1010	01	RW	N									1300	1355
Part of Term:		Campus:		Start Date:		Instructional Method:										
Grading Mode:		Building:		End Date:		Instructor:										
Credit Hours:		Room:		Instructor:		Primary										
200910	11376	DSPS	0800	02	RW	N									1050	1205
Part of Term:		Campus:		Start Date:		Instructional Method:										
Grading Mode:		Building:		End Date:		Instructor:										
Credit Hours:		Room:		Instructor:		Primary										
Co-op Education: Total Credit Hours: 13.000 Total CEU Hours: .000																

Enter the object name; Press LIST for listing.

E. TSAAREV

Account Detail Review Form – Is used to enter and review charge and payment information about a student's account. The balance of the account and the current amount due are calculated and displayed on the last line of this form. Any changes to the account information will modify these balances.

Oracle Developer Forms Runtime - Web: Open > TSAAREV - SOAHOLD - ROARMAN [Q] - SAAACKL [Q] - SZAADef [Q] - SFAREGQ [Q] - TSAAREV [Q]

File Edit Options Block Item Record Query Tools Help

ID: T00152822 Tamika M Word Credit Limit: User: JCADE Holds:

Account Details

Detail Code	Description	Term	Charge	Payment	Balance	Source Code	Effective Date
TUGM	Undergraduate Maintenance	200910	189.00		.00	R	12-JAN-2009
TUGM	Undergraduate Maintenance	200910	-189.00		.00	R	12-JAN-2009
A055	Federal Pell Grant	200910		1,991.00	-1,991.00	F	08-JAN-2009
A048	Unsub Loan Eft 1	200910		2,282.94	-1,841.44	F	08-JAN-2009
A046	Sub Loan Eft 1	200910		1,732.50	.00	F	08-JAN-2009
TUGM	Undergraduate Maintenance	200910	567.00		.00	R	15-DEC-2008
FGAC	General Access Fee	200910	22.00		.00	R	15-DEC-2008
FDBT	Debt Service	200910	9.00		.00	R	15-DEC-2008
TDSM	Developmental Studies Maintene	200910	321.00		.00	R	15-DEC-2008
FGAC	General Access Fee	200910	36.00		.00	R	15-DEC-2008
FDBT	Debt Service	200910	24.00		.00	R	15-DEC-2008
TUGM	Undergraduate Maintenance	200910	189.00		.00	R	15-DEC-2008

Query Balance	Account Balance	Amount Due	Memo Balance	Authorized Aid Balance	NSF	Receipt?
-3,832.44	-3,832.44	-3,832.44	.00	.00	0	N

Charge or payment detail code; press LIST for valid values.

Account Balance and Amount Due should be the same figure. This is the amount that the student owes.

If figures are listed in the fields above (Memo Balance, Authorized Aid Balance), refer the student to the Bursar's Office.

A minus (-) preceding the amount due/account balance denotes that the student registered/paid and will receive a refund in the amount listed.

Financial Aid Record Maintenance Form - This form is used to review a student's financial aid awards.

[illegible]

Offered	Accepted	Paid
<p>The figures listed in the Offered column are the funds that the student is eligible to receive. The total amount is listed at the bottom of the column.</p>	<p>The figures listed in the Accepted column are the funds the student has accepted. These figures may differ from those listed in the Offered column.</p> <p>If there are figures listed in the Offered column and no figures are listed in the Accepted column, the student needs logon to myTSU, click Banner Services, Financial Aid, and following instructions to accept the awards offered.</p>	<p>Once the aid has been offered and accepted, it is posted to the student's account, which is displayed on TSAAREV.</p>
<p>If no information show on this form, the aid has not been processed; thus, the student should be referred to the Financial Aid Office.</p>		