

# Advising Training Manual

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## Keyboard Shortcuts

<b>Function</b>	<b>Menu Option</b>	<b>Keystroke Option</b>
Cancel Query	Query/Cancel	Ctrl + Q
Clear or Delete Record	Record/Clear or Record/Remove	Shift + F6
Enter Query	Query/Enter	F7
Execute Query	Query/Execute	F8
Exit	File/Exit	Ctrl + Q
Insert Record	Record/Insert	F6
Next Block	Block/Next	Ctrl + Page Down
Next Field	Field/Next	Tab
Next Record	Record/Next	Down Arrow
Previous Block	Block/Previous	Ctrl + Page Up
Previous Field	Field/Previous	Shift + Tab
Previous Record	Record/Previous	Up Arrow
Rollback	File/Rollback	Shift + F7
Save	File/Save	F10
Select	File/Select	Shift + F3

## Toolbar Buttons



Save



Rollback



Select



Insert Record



Delete Record



Previous Record



Next Record



Previous Block



Next Block



Enter Query



Execute Query



Cancel Query



Online Help



Exit

# Searching for a Student

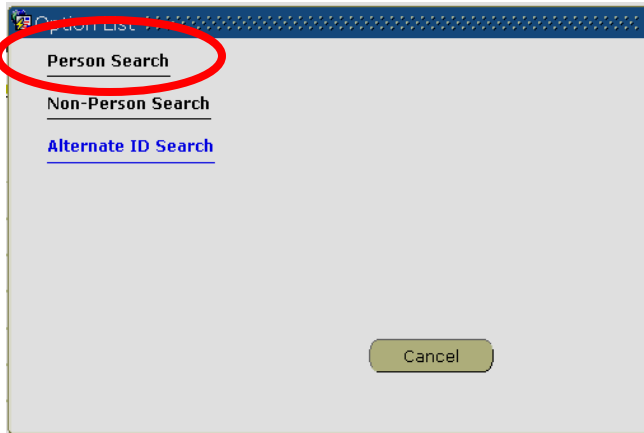
A person search may be performed using any form that has the ID field in the Key Block, such as **SPAIDEN**, **SPAPERS**, **GOAEMAL**, **SPAEMRG**, **SGASTDN**, **SGAADVR**, **SGASTDQ** and **SPATELE**. The **Search** icon (**down arrow**) next to the ID field, will take you to an additional form, which allows you to enter information to perform a search. A search can be performed using a partial name or UNC Charlotte ID.

To initiate a search:

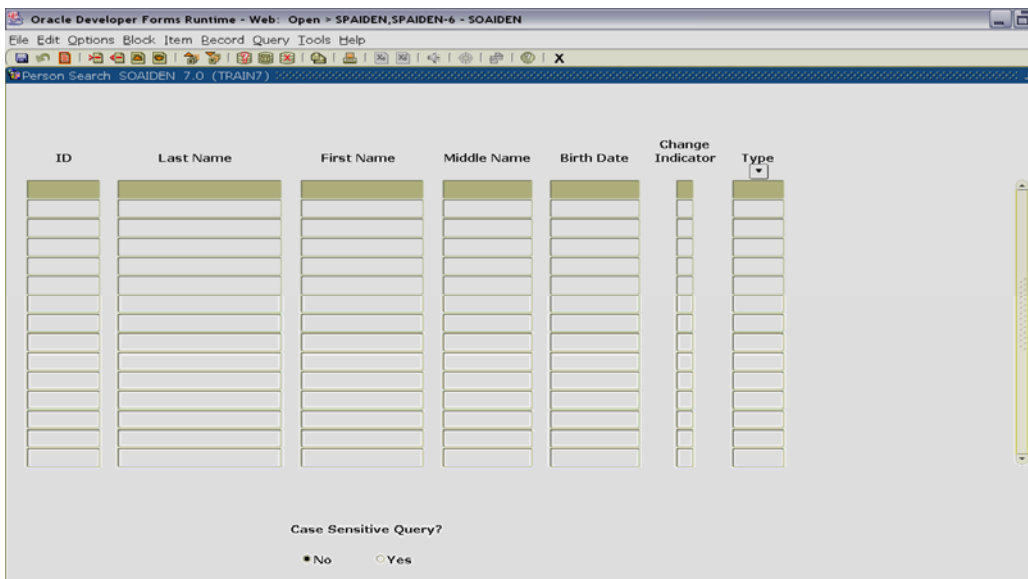
1. Click the **Search** icon (**down arrow**) next to the ID field to access the Person Search Form.



2. Click on Person Search from the Options list.



3. This will open the Person Search Form (**SOAIDEN**).



# Searching for a Student

## *Wildcards*

The wildcard “%” can represent any number of characters in the selected position.

- Querying “sm%h” would return Smith, Smooth, and Smertsworth, but not Smythe.

The wildcard “\_” (underscore) represents a *single* character in the selected position.

- Querying “sm\_th” would return Smith, but not Smooth.

## *To search using a last name:*

1. In the **Last Name** field on the Person Search Form (**SOAIDEN**), enter the last name of the student.
2. Execute the query by clicking the **Execute Query** icon (or press **F8**).
3. Double-click on the student for whom you are searching.
4. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

## *To search using a partial last name:*

1. In the **Last Name** field on the Person Search Form (**SOAIDEN**), enter the partial last name of the student.
2. You must use the wildcard “%” to represent the unknown characters.
  - “Cov%” will search for all people with last names that start with Cov.
3. Execute the query by clicking the **Execute Query** icon (or press **F8**).
4. Double-click on the student for whom you are searching.
5. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

## *To search using a partial UNC Charlotte ID:*

1. In the ID field on the Person Search Form (**SOAIDEN**), enter the partial UNC Charlotte ID.
2. You must use the wildcard “%” to represent the unknown characters.
  - Use “80021%” to search for all UNC Charlotte IDs that start with “80021.”
3. Execute the query by clicking the **Execute Query** icon (or press **F8**).
4. Double-click on the student for whom you are searching.
5. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

# Registration Overrides

The screenshot shows the SFASRPO 7.0 (BANTEST7) application window. At the top, there is a menu bar with 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. Below the menu bar is a toolbar with various icons. The main window has a title bar that reads 'Student Registration Permit-Override SFASRPO 7.0 (BANTEST7)'. Below the title bar, there are two input fields: 'ID:' and 'Term:'. The main content area is divided into two sections. The first section is titled 'Student Permits and Overrides' and contains a table with columns: Permit, CRN, Subject, Course Number, Section, User, and Activity Date. The second section is titled 'Student Schedule' and contains a table with columns: CRN, Part of Term, Subject, Course Number, Section, Available, Waitlisted, Mon, Tue, Wed, Thu, Fri, Sat, Sun, Begin Time, and End Time.

## Viewing a Registration Override

1. Access the Registration Permit Override Form (**SFASRPO**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions).
3. In the **Term** field, enter the term you wish to view.
4. Perform a **Next Block**.
  - Registration permit override information for the student will be displayed.
5. To view another student, click the Rollback icon (or **Shift-F7**) and repeat steps 2-4.
6. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

## Entering a Registration Override (repeat steps 1-4 from above).

**NOTE:** For a blank permit field, use the down arrow key or click the Insert Record icon (or press **F6**).

1. In the **Permit** field, enter the override type you are issuing to the student.
  - Double click in the permit field to see a list of override types.
    - AUTH – to override subject and course for any section.
    - AUTH code is **strongly suggested** in order to prevent over-enrollment.
2. In the **CRN** field, enter the CRN of the section to override.
  - Click the search icon to find the CRN of the section.
  - The user ID of the person issuing the override will be listed in the **User** field.
3. Click the **Save** icon (or **Shift-F10**).
4. To enter another override, click the **Rollback** icon (or **Shift-F7**) and repeat steps 1-3.
5. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

# Releasing Advising Holds

File Edit Options Block Item Record Query Tools Help

Hold Information SOAHOLD 7.3 (BANTEST7)

ID:

**Hold Details**

Hold Type:  Reason:   Release Indicator

Amount:  From:  To:  Origination Code:

Hold Type:  Reason:   Release Indicator

Amount:  From:  To:  Origination Code:

Hold Type:  Reason:   Release Indicator

Amount:  From:  To:  Origination Code:

1. Access the Hold Information Form (**SOAHOLD**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions).
3. Perform a **Next Block**.
  - Hold information for the student will be displayed.
  - Use the down arrow key or scroll bar to the right of the form to view additional holds.
4. Select the Advising hold you want to release.
5. In the **To** field, enter **today's** date.
6. Click the **Save** icon (or **F10**).
7. To view another student, click the **Rollback** icon (or **Shift F7**) and repeat steps 2-3.
8. To return to the General Menu, click the **Exit** icon (or **Ctrl Q**).

# Viewing Academic Standing

The screenshot shows a web application window titled "General Student SGASTDN 7.3 (BANTEST7)". The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. Below the toolbar, there are input fields for "ID:" (800066393) and "Covert, Robert L.", a "Student Summary" dropdown, and a "Term:" dropdown (200650). A checkbox for "View Current/Active Curricula" is also present. A tabbed interface at the bottom shows several tabs: "Learner", "Curricula", "Activities", "Veteran", "Comments", "Academic and Graduation Status, Dual Degree" (which is selected), and "Miscellaneous".

The main content area is divided into three sections:

- Academic Status:** Includes fields for "Academic Term:" (200610), "Academic Status:", "Academic Standing Override:", "Academic Status Override Term:", "Progress Evaluaton:", "Progress Evaluation Override:", "Progress Evaluation Override Term:", "Combined Academic Standing:", "Combined Academic Standing Override:", and "Combined Academic Standing Override Term:".
- Graduation Status:** Includes fields for "Expected Graduation Date:" (13-MAY-2006), "Graduation Term:" (200610), and "Graduation Year:" (2006).
- Dual Degree:** Includes fields for "Degree:", "Level:", "College:", "Department:", and "Major:".

1. Access the General Student Form (**SGASTDN**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to find the student (see pages 5-6 for additional instructions).
3. In the **Term** field, enter the term you want to view.
4. Perform a **Next Block**.
  - The student's General Student records will be listed in the Information block.
5. Select **Academic and Graduation Status, Dual Degree** tab.
  - The student's academic status will be displayed.
  - To return to **SGASTDN**, click the **Return** button.
5. To view another student or Term, click the **Rollback** icon (or **shift F7**) and repeat steps 2-4.
6. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

**Note:** To view a summary of all general student information, click the **Summary** search icon; this will bring up the form **SGASTDQ**.

# Viewing Graduation Status

The screenshot shows a software interface for viewing student graduation status. At the top, there is a menu bar with options: File, Edit, Options, Block, Item, Record, Query, Tools, Help. Below the menu bar is a toolbar with various icons. The main window title is "General Student: SGASTDN 7.3 (BANTEST7)".

At the top of the form, there are input fields for "ID:" (800066393) and "Covert, Robert L.". To the right, there is a "Student Summary" dropdown menu, a "Term:" dropdown menu (200650), and a checkbox for "View Current/Active Curricula".

Below this, there is a horizontal tab bar with the following tabs: "Learner", "Curricula", "Activities", "Veteran", "Comments", "Academic and Graduation Status, Dual Degree" (which is selected), and "Miscellaneous".

The main content area is divided into two columns:

- Academic Status:** This section contains several rows of fields. Each row has a label on the left and a field on the right. The fields are: "Academic Term:" (200610), "Academic Status:" (empty), "Academic Standing Override:" (empty with a dropdown arrow), "Academic Status Override Term:" (empty with a dropdown arrow), "Progress Evaluation:" (empty), "Progress Evaluation Override:" (empty with a dropdown arrow), "Progress Evaluation Override Term:" (empty with a dropdown arrow), "Combined Academic Standing:" (empty), "Combined Academic Standing Override:" (empty with a dropdown arrow), and "Combined Academic Standing Override Term:" (empty with a dropdown arrow).
- Graduation Status:** This section contains: "Expected Graduation Date:" (13-MAY-2006 with a calendar icon), "Graduation Term:" (200610 with a dropdown arrow), and "Graduation Year:" (2006 with a dropdown arrow).
- Dual Degree:** This section contains: "Degree:" (empty with a dropdown arrow), "Level:" (empty with a dropdown arrow), "College:" (empty with a dropdown arrow), "Department:" (empty with a dropdown arrow), and "Major:" (empty with a dropdown arrow).

1. Access the General Student Form (**SGASTDN**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to find the student (see pages 5-6 for additional instructions).
3. In the **Term** field, enter the term you want to view.
4. Perform a **Next Block**.
  - The student's General Student records will be listed in the Information block.
5. Select **Academic and Graduation Status, Dual Degree** tab.
  - The student's graduation information will be displayed.
  - To return to **SGASTDN**, click the **Return** button.
5. To view another student or Term, click the **Rollback** icon (or **shift F7**) and repeat steps 2-4.
6. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

**Note:** To view a summary of all general student information, click the **Summary** search icon; this will bring up the form **SGASTDQ**.

## Viewing a Student's Academic History

Course Maintenance SHATCKN 7.3.0.1 (BANTEST7)

ID: 800209093 Sanburg, Martha E. Term: 200580 Validation Check: Pre-Banner

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**Course Detail**

CRN: 12838 Subject: MATH Course: 0900 Math Developmental  
 Section: Campus: Repeat: (None) System:  
 Schedule Type: LC Part of Term: Comment:  
 Continuing Education Units Co-op Education: Start/End Dates: Extension:

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**Grades**

Sequence Number	Grade	Grade Mode	Hours	Change Reason	Extension Date	Grade Date	Grade Comment	User
1	B	S	1.000	XO PLUS Official Grade		12-JUL-2005		SCTCVT

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**Level**

Code: UG Undergraduate  Primary Level Indicator

### Course Summary Information

1. Access the Course Summary Form (**SHACRSE**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions).
3. Leave the **Term** field blank to view course information for all terms.
  - To view courses for a specific term, enter the term code in the **Term** field.
4. Perform a **Next Block**.
  - A summary of the student's courses and grades will be listed.
5. Click the **Select** icon on the left to view specific information for a course.
  - Course Detail and Grade information will be listed for the student.
6. From the Options menu, select *Course Instructors and Attributes*.
  - Instructor, Course Attribute and Person Attribute will be listed for the course.

# Viewing Prior Institution Information

Prior College SOAPCOL 7.3 (BANTEST7)

ID: 800066393 Covert, Robert L.

Prior College and Degree | Majors, Minors, Concentrations | Prior College Address

### Prior College

Prior College: 003827 West Virginia University Enrollment Planning Service Code:

Transcript Received Date: 30-APR-2004

Transcript Reviewed Date: 30-APR-2004

Admissions Request:

Official Transcript

### Degree Details

Degree: BSBA BS-Business Administration Degree Date: 29-DEC-2003   Primary Degree Indicator

Attended From: 01-AUG-1990  Attended To: 01-DEC-2003  Year: 2003

College:

Transfer Hours:  GPA: 2.78

Honors:  Goal:

1. Access the Prior College Form (**SOAPCOL**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions).
3. Perform a **Next Block**.
  - Prior college information for the student will be displayed.
  - With the cursor in the prior college field, use the down arrow key to view additional prior colleges.
  - If the student received a degree from the prior institution, the degree information will be displayed at the bottom portion of the form.
4. To view another student, click the **Rollback** icon (or **Shift F7**) and repeat steps 2-3.
5. To return to the General Menu, click the **Exit** icon (or **Ctrl Q**).

# Viewing Transfer Course Information

The screenshot shows a software window titled "Transfer Course Information SHATRNS 7.3 (BANTEST7)". The window contains several input fields and dropdown menus. At the top, there is a menu bar with "File Edit Options Block Item Record Query Tools Help". Below the menu bar is a toolbar with various icons. The main form area is divided into sections: "Transfer Institution" and "Transfer Attendance Period". The "Transfer Institution" section includes fields for "Institution:" (with a dropdown), "Transcript Receipt Date:" (with a date picker), and a checkbox for "Official". The "Transfer Attendance Period" section includes fields for "Attendance Period:", "Acceptance Date:" (with a date picker), "Effective Term:" (with a dropdown), "Term Type:", "Apply to Level:" (with a dropdown), "Transfer Degree:" (with a dropdown), "Attendance Begin Date:" (with a date picker), and "Attendance End Date:" (with a date picker). At the top of the form, there are fields for "ID:" (with a dropdown), "Transfer Institution Number:" (with a dropdown), and "Attendance Period Number:" (with a dropdown).

1. Access the Transfer Course Information Form (**SHATRNS**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions).
3. In the **Transfer Institution Number** field, enter the transfer institution number.
  - Use the **Search** icon to search for institutions.
  - If no institution is listed, the transfer information has not been entered.
4. In the **Attendance Period Number** field, enter the attendance period number.
  - Use the **Search** icon to search for attendance number.
  - If no attendance period is listed, the transfer information has not been entered.
5. Perform a **Next Block**.
  - The transfer institution information for the student will be listed.
6. To view specific transfer credit information, perform a **Next Block**.
  - This form will display the course information from the transfer institution, the UNC Charlotte equivalent course, and any course attributes assigned to that course.
7. To view credit hour and GPA data for the transfer courses, perform a **Next Block**.
8. To view another student, click the **Rollback** icon (or **Shift F7**) and repeat steps 2-5.
9. To return to the General Menu, click the **Exit** icon (or **Ctrl Q**).

