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Banner Student Registration Handbook

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August 2015



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Prepared by: Ellucian
4375 Fair Lakes Court
Fairfax, Virginia 22033
United States of America

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Introduction

This handbook contains information on Banner Student Registration 9.x. It includes information for the Banner Student Registration, Banner Student Overall, and Banner Student Self-Service applications. These applications provide processing for basic registration, block registration, registration planning, projected registration, and structured registration.

- The Banner Student Registration application contains the SFXXXXX administrative pages used with registration processing.
- The Banner Student Overall application contains the SOXXXXX, STVXXXX, and GUXXXXX administrative pages used with registration processing.
- The Banner Student Self-Service application contains the Self-Service pages and tabs used with registration processing.

The registration and overall information is combined throughout this handbook for ease of setup and use. For example, SOATERM has specific setup requirements for basic registration, as well as for registration planning, structured registration, and projected registration. The chapters that contain the information for each type of registration include the SOATERM page setup and the specific SFXXXXX page setup.

You can also refer to the "Quick Start Information" chapter for simplified setup steps for the delivered types of registration processing. Go to the individual processing chapters for more detailed setup and use information for a specific type of registration, such as block registration.

Self-Service page and tab information is contained in its own chapter with links and paths available from the Landing page.

An appendix explains the extensibility tools available with Banner Student Registration 9.x.

The following chapters are in this book.

- ["Quick Start Information" on page 18](#)
- ["Banner 9.x User Interface" on page 25](#)
- ["Registration Setup and Use" on page 48](#)
- ["Block Registration" on page 72](#)
- ["Registration Planning" on page 85](#)
- ["Structured Registration" on page 108](#)
- ["Projected Registration" on page 131](#)
- ["Self-Service Registration" on page 150](#)
- ["Appendix - Extensibility in Registration" on page 227](#)

Review the next section for lists of administrative and Self-Service pages used for basic registration processing, block registration, registration planning, projected registration, and structured registration. The administrative pages are summarized in the processing-specific chapters and detailed in the online help.

Administrative pages

The following Banner Student pages are used with Registration 9.x. Please refer to the *Banner Student Registration Online Help 9.x* for page and field details.

Registration pages

Important note for SFAREGS - Use the SFAREGS page in Banner 8.x for registration processing. An administrative registration display of course information exists in 9.x Student Self-Service. This registration view can be accessed and updated by users with the REGISTRAR persona, but it does not contain full processing functionality.

The following Registration pages are used with basic registration.

- Registration Additional Fees Page (SFAEFEE)
- Enrollment Status Control Page (SFAESTS)
- Registration Fees Min/Max Charge Control Page (SFAFMAX)
- Registration Minimum Maximum Hours Page (SFAMHRS)
- Registration Priority Control Page (SFARCTT)
- Student Course/Fee Assessment Query Page (SFAREGF)
- Registration Query Page (SFAREGQ)
- Registration Fee Assessment Refund by Total Rules Page (SFARFND)
- Student Registration Group Page (SFARGRP)
- Third Party Registration Time Controls Page (SFARGTC)
- Registration Error Messages Page (SFARMSG)
- Registration Permit-Overrides Control Page (SFAROVR)
- Course Registration Status Page (SFARSTS)
- Reserved Seats Waitlist Priority Management Page (SFARWLP)
- Student Registration Permit-Override Page (SFASRPO)
- Student Course Registration Audit Page (SFASTCA)
- Time Status Rules Page (SFATMST)

- Student Withdrawal Page (SFAWDRL)
- Waitlist Priority Management Page (SFAWLPR)
- Cross List Waitlist Priority Management Page (SFAXWLP)
- Student Registration Group Query Page (SFIRGRP)
- Student Withdrawal Query Page (SFIWDRL)
- Waitlist Notification Error Query Page (SFIWLNE)
- Waitlist Notification Query Page (SFIWLNT)
- Registration Section Query Page (SFQSECM)
- Registration Course Query Page (SFQSECT)

Block registration pages

The following pages are used with block registration.

- Block Registration Control Page (SFABLCK)
- Block Rule Definition Page (SFABRDF)
- Pre-Assigned Block Configuration Page (SFAPABC)
- Student Block Pre-Assignment Page (SFABLPA)
- Student Block Selection Inquiry Page (SFIBSEL)

Registration planning pages

The following Overall pages are used with registration planning.

- External API Connection Information Page (SOAREST)
- External API Information Validation Page (STVREST)

Projected registration forms

The following Banner Student 8.x forms are used with projected registration. They are delivered with Banner Student 8.7 and are detailed in the *Banner Student Online Help 8.7*.

- Projection Configuration by Program Form (SFALPRO)
- Projection Maintenance Form (SFAPROJ)

Overall pages

The following Overall pages are used with Banner Student Registration. This list includes validation pages.

- Information Text Editor Page (GUAINFO)
- Alternate Personal Identification Number Page (SPAAPIN)
- Curriculum Rules Control Page (SOACTRL)
- Hold Information Page (SOAHOLD)
- Open Learning Section Default Rules Page (SOAORUL)
- Persona Rules Page (SOAPERS)
- Student Centric Period Term Control Page (SOASCPT)
- Term Control Page (SOATERM)
- Web Display List Customization Page (SOAWDSP)
- Overall Page and Field Configuration Page (SOAWSCR)
- Waitlist Automation Term Control Page (SOAWLTC)
- Persona Validation Page (STVPERS)
- Course Registration Status Code Validation Page (STVRSTS)
- Overall Configurable Page Field Validation Page (STVWSFD)
- Overall Configurable Page Validation Page (STVWSPG)

Search pages

The following Overall pages are used as advanced filters for data searches.

- Person Search Page (SOAIDEN)
- Person Search Detail Page (SOAIDNS)
- Non-Person Search Page (SOACOMP)
- SSN/SIN Alternate ID Search Page (GUIALTI)
- General Search Page (GUISRCH) - Telephone, Email, Additional ID

These pages are accessed as Advanced Filters from the **ID** field of pages that allow a search. The search can include person, person detail, non-person, alternate ID, additional ID, telephone, and email information.

Reports and processes

The following reports and processes in Banner Student 8.x are used with registration processing. They are run through job submission.

- Student Block Pre-Assignment Process (SFPSBPA)
- Incomplete Block Registration Report (SFRIBLR)
- Student Projection Process (SFPPROJ)
- Schedule Planning Report (SFRPRES)\

Self-Service pages

Self-Service pages are used by students, faculty members, and advisors for registration processing. Here is a breakdown of the pages and tabs that can be accessed.

Introductory pages

The following Banner Self-Service pages are displayed after the user logs in, if the pages are set up to do so:

- Terms of Usage page
- Security Question and Answer page
- Update Ethnicity and Race Survey page
- Forgot PIN page

Registration pages

The following Banner Self-Service pages are available for use with registration processing.

- Registration Landing page
- Persona Selection page
- Select a Term (with Name and ID Search)
- Prepare for Registration, with associated tabs
 - Registration Status
 - Update Student Term Data

- Class Search and Registration, with associated tabs
 - Find Classes
 - Enter CRNs
 - Plans
 - Blocks
 - Projections
 - Structured
 - Schedule and Options
- Register for Classes - Administrator View
- View Registration Information, with associated tabs
 - Look up a Schedule
 - Active Registrations
 - Schedule by Centric Period
- Class Search (Browse Classes) - without login
- Course Search (Browse Course Catalog) - without login

Quick Start Information

This chapter discusses how to quickly set up and access the Banner Student 9.x registration functionality. More detailed information is available in the specific processing chapters.

Before any setup is performed, it is assumed that the technical installation of the applications has been completed, access URLs have been validated, and portal or single sign on setup has been done. Standard setup of controls on the Term Control Page (SOATERM) should also be completed, as is done for Banner Student 8.x registration.

Additional registration setup is required to use Banner Student Registration 9.x for these processing areas.

- [“Basic registration” on page 18](#)
- [“Block registration” on page 19](#)
- [“Registration planning” on page 20](#)
- [“Structured registration” on page 21](#)
- [“Projected registration” on page 23](#)

Basic registration

Do the following to set up basic registration processing on the administrative pages.

1. In Banner 9.x, access the Term Control Page (SOATERM).
 - 1.1. Select the Term Management tab and go to the Registration Model section.
 - 1.2. Set the indicators for the registration models you wish to use.
 - 1.3. Set the add and drop indicators.

These indicators are used in Banner 9.x in place of GTVSDAX rules used in Banner 8.x.

Indicator	Replaces GTVSDAX rule
Allow Student to Select Conditional Add Drop check box	CONDADDDRP
Allow Student to Drop their Last Class check box	WEBDROPLST
Auto Drop, Connected Course, Drop Errors radio group	AUTODROP

Indicator

Replaces GTVSDAX rule

Administration Drop Connected Course Errors radio group	ADMINDROP
--	-----------

- 1.4. Save the changes.
2. In Banner 8.x, access the Program Requirements Page (SMAPROG).

Verify that the registration model is defined for the program and term range, based on the registration model selections on SOATERM.
3. In Banner 9.x, access the Overall Page and Field Configuration Page (SOAWSCR).
 - 3.1. Customize the column display for the user interface.

SOAWSCR replaces the SOATERM search and view controls for Catalog and Schedule.
 - 3.2. Save the changes.

Do the following to use registration.

1. Access Banner 9.x Self-Service Registration.
2. Select Register for Classes on the Landing page.
3. Log on as a student and begin the registration process.

Additional setup and processing information is available in the "Registration Setup and Use" chapter and the "Self-Service Registration" chapter.

Block registration

Do the following to set up block registration on the administrative pages.



Note: You cannot mix the use of block scheduling in Banner 8.x and block registration in Banner 9.x. You must choose one or the other.

1. In Banner 8.x, access the Block Code Validation Page (STVBLCK) and define block codes.
2. In Banner 9.x, access the Block Registration Control Page (SFABLCK) and build blocks of course sections.
3. In Banner 9.x, access the Block Rule Definition Page (SFABRDF) and build rules to associate blocks with student characteristics.
4. In Banner 9.x, access the Pre-Assigned Block Configuration Page (SFAPABC) and activate block registration by term.

Or, you may manually pre-assign a block to a student.

5. In Banner 9.x, access the Student Block Pre-Assignment Page (SFABLPA) and manually pre-assign a block to a student, so the student can select the block during registration.

Or, you may pre-assign blocks to a student in batch.

6. In Banner 8.x, run the Student Pre-Assignment Process (SFPSBPA) to pre-assign blocks to a student based on the SFABRDF rules.

Do the following to use block registration.

1. Access Banner 9.x Self-Service Registration.
2. Select Register for Classes on the Landing page.
3. Log on as a student who matches the characteristics of a pre-assigned block rule (SFAPABC) and begin the registration process.

Additional setup and processing information is available in the "Block Registration" chapter and the "Self-Service Registration" chapter.

Registration planning

Do the following to set up registration planning on the administrative pages.

1. In Banner 9.x, access the Term Control Page (SOATERM).
 - 1.1. Select the Term Management tab and go to the Self-Service Options information.
 - 1.2. Set the **Term open for Self-Service Planning** indicator to checked or \checkmark .
 - 1.3. Set the **Maximum plans for term** field to the number of plans a student should be allowed to have for any given term.
 - 1.4. Set the **Display Self-Service plans in registration** indicator to checked or \checkmark .
 - 1.5. Set the **Allow adding course sections to plan** indicator to checked or \checkmark , when the class schedule is available for the term.
 - 1.6. Set the **Check third party degree audit system plans** indicator to checked or \checkmark , when student SEPs from Degree Works can be viewed in Banner 9.x registration.
 - 1.7. Set the **Display third party degree audit system plans in registration** indicator to checked or \checkmark , when student SEPs from Degree Works can be viewed in Banner 9.x registration and planning.
2. In Banner 9.x, access the External API Information Validation Page (STVREST).
 - 2.1. Verify that codes used for registration planning and Degree Works (or other third party systems) exist.
3. In Banner 9.x, access the External API Connection Page (SOAREST).
 - 3.1. Set up the external API connection information if SEPs from Degree Works will be used with planning.

4. In Banner 9.x, access the Overall Page and Field Configuration Page (SOAWSCR).
 - 4.1. Define the persona, page, and effective term field configurations for registration planning

Do the following to use registration planning.

1. Access Banner 9.x Self-Service Registration.
2. Select Plan Ahead on the Landing page to build a plan for a student.
3. Log on as a student.
4. Select Register for Classes on the Landing page to access an existing plan for registration.
5. Log on as a student and select the Plans tab.

Additional setup and processing information is available in the "Registration Planning" chapter and the "Self-Service Registration" chapter.

Structured registration

Do the following to set up structured registration on the administrative pages.



Note: You must choose to use either structured or projected registration. You cannot set up a mix of both types of processing.

1. In Banner 8.x, set up CAPP programs and areas.

See the *Banner Student CAPP Handbook* for more information.
2. In Banner 8.x, access the Program Requirements Page (SMAPROG).

Verify that the registration model is defined for the program and term range.
3. In Banner 8.x, set up rules for the REGPROJSTRUCT internal code group on the Crosswalk Validation Page (GTVSDAX) to support the correct relationship between students and the CAPP program definitions.
 - 3.1. For the AREASELECT internal code, enter P (Priority), N (Name), or A (All Areas) depending on how the CAPP programs were defined.
 - 3.2. For the CLASS internal code, create an entry for each classification code used for a correlation between the CAPP area definition and the student's classification.
4. In Banner 9.x, access the Term Control Page (SOATERM).
 - 4.1. Select the Term Management tab and go to the Registration Model section.
 - Select the **Structured** indicator.
 - 4.2. Select the Structured Registration tab and set the controls for Error Severity, Mandatory, Optional, Elective, External API, and Information Text.

Error Severity

- Set the **Error Severity** radio group to Fatal, Warning, or None.

Mandatory

- Check the **Mandatory** indicator when the student is expected to register for mandatory classes.

Enter the **Mandatory Rule Key** when mandatory classes are defined under an area rule. The rule key is the name by which the mandatory classes are defined. If left blank, registration expects mandatory classes to be defined at the top most level of the CAPP area.

Optional

- Check the **Optional Active** indicator when the student is expected to register for optional classes.

The **Optional Rule Key** is the name by which the optional classes are defined. It is required.

Elective

- Check the **Elective Active** indicator when the student is expected to register for elective classes.

The **Elective Rule Key** is the name by which the elective classes are defined. It is required.

External API

- Enter the information for the **External API** value when CAPP is not in use.

This will be blank for base Banner institutions.

Information Text

- Define information text settings for print type.

When additional text instructions have been appended to a CAPP rule and should be visible to the student, enter the print type to be used in the **Structured Print Type** field.

When the rule text contains a URL that is to be displayed to the student, enter the print type to be used in the **Links Print Type** field.

Do the following to use structured registration.

1. Access Banner 9.x Self-Service Registration.
2. Select Register for Classes on the Landing page.
3. Log on as a student and select the Structured tab.

Additional setup and processing information is available in the "Structured Registration" chapter and the "Self-Service Registration" chapter.

Projected registration

Do the following to set up structured registration on the administrative pages.



Note: You must choose to use either projected or structured registration. You cannot set up a mix of both types of processing.

1. In Banner 8.x, set up CAPP programs and areas.

See the *Banner Student CAPP Handbook* for more information.

2. In Banner 8.x, access the Program Requirements Page (SMAPROG).

Verify that the registration model is defined for the program and term range.

3. In Banner 8.x, access the Projection Configuration by Program Page (SFALPRO).

- 3.1. Create an entry for each CAPP program to be used in projecting what courses a student is to take.

- Enter a number equivalent to no more than two years of areas in the **Maximum Number of Areas to Project** field.

- Set the value of the **Maximum Number of Areas Over Student Class** field.

Usually this would be 1.

4. In Banner 8.x, set up rules for the REGPROJSTRUCT internal code group on the Crosswalk Validation Page (GTVSDAX) to support the correct relationship between students and the CAPP program definitions.

- 4.1. For the AREASELECT internal code, enter P (Priority) or N (Name) depending on how the CAPP programs were defined.

- 4.2. For the CLASS internal code, create an entry for each classification code used for a correlation between the CAPP area definition and the student's classification.

- 4.3. For the PRIADJFAC internal code, set the value to an increment used in the CAPP area name or the priority assigned to an area.

5. In Banner 9.x, access the Term Control Page (SOATERM).

- 5.1. Select the Term Management tab and go to the Registration Model section.

- Select the **Projected** indicator.

- 5.2. Select the Projected Registration tab and set the controls for Restrictions, Student Projection, Mandatory, Elective, and External API.

Restrictions

- Check the **Term open for Self-Service Projections** indicator.

- Check the **Restrict to Projected Courses** indicator when the student is only allowed to register for courses in the projected list.

- Check the **Restrict to Null Projections** indicator when the **Restrict to Projected Courses** indicator is checked, and the student is required to have a projection.

Student Projection

- Check the **Include Failed Courses in Student Projections** indicator to capture when a student fails a course, and the course is then added to the projected list. (This is helpful when compliance has been run assuming that students would pass their current classes.)
- Check the **Mark Failed Courses as Most Probable** indicator to forecast seat requirements for courses in the term. This does not impact registration processing.

Mandatory

- Enter the **Mandatory Rule Key** when courses that are required for students to complete their degrees have been entered into CAPP area rules, and you wish to have them designated as mandatory on the projected list. Courses found under rules with this rule key name are identified as mandatory for registration.

Elective

- Enter the **Elective Rule Key** when courses that are optional for students to complete their degrees have been entered into CAPP area rules, and you wish to have them designated as elective on the projected list. Courses found under rules with this rule key name are identified as elective for registration.

External API

- Enter the information for the **External API** value when CAPP is not in use.

This will be blank for base Banner institutions.

6. In Banner 8.x, create compliance data for students using the CAPP SMARQCM form or the SMRBCMP batch process.
7. In Banner 8.x, run the Student Projection Process (SFPPROJ) to produce the projected list output.
8. In Banner 8.x, view and maintain the projected list by student on the Projection Maintenance Form (SFAPROJ).

Do the following to use projected registration.

1. Access Banner 9.x Self-Service Registration.
2. Select Register for Classes on the Landing page.
3. Log on as a student and select the Projections tab.

Additional setup and processing information is available in the "Projected Registration" chapter and the "Self-Service Registration" chapter.

Banner 9.x User Interface

This chapter describes how to access and become familiar with the Banner 9.x user interface.

Banner Getting Started Guide

Please refer to the *Banner Getting Started Guide 9.x* for information such as:

- object naming conventions
- logging in to the application
- user interface details
- page details
- keyboard shortcuts
- filters and queries
- Value-Based Security (VBS)
- Supplemental Data Engine (SDE)
- Multi-Entity Processing (MEP)
- data masking
- object maintenance
- data extract
- terminology usage from Banner 8.x to Banner 9.x
- translations

Log in to Registration

When you access Banner Student Registration Self-Service, you are taken directly to the Registration Landing page. You can select from various options. Unsecured options do not require you to log in to continue. Secured options require you to log in to continue.

Log out of Registration

When you exit out of Registration, *always* use the **Sign Out** button at the top of the page, and then exit out of the browser. This will completely close your session.

The application uses cookies and caching, so if you do not sign out completely, the next person who uses that computer may be able to access your records.

Navigate between 9.x modules



Warning! When CAS is not enabled, you will need to log into the Banner Student modules separately.

Single Sign On with CAS

Please refer to the *CAS Single Sign On Handbook* for information on using CAS and the SSO Manager.

Page heading items

The Registration pages contain the following items at the top. Some of the items can be accessed using keyboard shortcuts.

- Institution name
- **Home** button (Ctrl+ Home)
- Browse pulldown (Alt + M)

This item is not active for all browsers at this time.

- Tools menu (Alt + L)

The Tools menu contains only the Item Properties option at this time.

- Username from login
- **Sign Out** button (Ctrl + Shift + Q)
- Notification Center (number of notifications and messages)

Keyword searches

In the Banner Student Registration Self-Service application, you can perform searches using keywords for the following parameters:

- Keyword (With All Words)
- Keyword (With Any Word)
- Keyword - This option is used for partial words.
- Keyword (Exact Phrase)
- Keyword (Without The Word)

Overview

The following fields are considered during a keyword search against the Class Schedule:

- Subject code
- Subject description
- Class title (Uses a hierarchy based on SOATERM Web controls for **Display Long Course Title** and **Display Long Section Title**)
- Class description (Uses a hierarchy based on SOATERM Web controls for **Display Long Course Description** and **Display Long Section Description**)
- Degree program attribute codes (SSAETL)
- Degree program attribute descriptions
- Course number (such as 100)
- Subject code plus course number (such as ART100)
- CRN

The following fields are considered during a keyword search against the Course Catalog:

- Subject code
- Subject description
- Course title
- Course long title
- Course description
- Course text
- Course number
- Subject code plus course number

- Degree program attribute codes
- Degree program attribute descriptions

Special characters

The use of special characters in search criteria may affect the search results. You can only use the following special characters as delimiters.

- , (comma)
- . (period)
- : (colon)
- ; (semi-colon)

Use of the - (hyphen or dash) is not recommended, as it may cause a search to fail to execute. Characters such as *, ^, ', !, @, \$, #, &, ?, [,], (.), |, are stripped out.

When you are searching on an instructor name, if the name entered contains an ' (apostrophe), no name will be returned. For example, if you enter O'Brien, the search will not return the name. If you enter OB or Brien, the name is returned.

When you are searching on a course number, you can use % as a wildcard for your search. For example, if you search on CHEM4%, the results will return CHEM courses that start with the number 4.



Note: The keyword searches for course and class are not case sensitive.

When using the Not Any keyword for a Keyword (With Any Word) search, a positive keyword is also needed. For example, use the Not Any keyword to search for documents that contain one condition and not another.

Here is another example. When performing a search for classes with the word "cultural" in any description or title but that do not have the word "history" in any description or title, you would enter the following.

- Keyword: cultural
- Keyword (Without The Word): history

Stop words

Oracle does not consider stop words in a search. The list of stop words provided below has been defined for use in the Ellucian Oracle installation. The words may vary depending on the locale of the Oracle installation. The complete list of stop words can be found using the following query:

```
SELECT spw_word FROM ctx_stopwords;
```

Here are some of the stop words found using the query.

Mr	can	however	only	then	where
Mrs	could	i	onto	there	whether
Ms	d	if	or	therefore	which
a	did	in	our	these	while
all	do	into	ours	they	who
almost	does	is	should	this	whose
also	either	it	s	those	why
although	for	its	shall	though	will
an	from	just	she	through	with
and	had	ll	since	thus	would
any	has	me	so	to	yet
are	have	might	some	too	you
as	having	my	still	until	your
at	he	no	such	ve	yours
be	her	non	t	very	
because	here	nor	than	was	
been	hers	not	that	we	
both	him	of	the	were	
but	his	on	their	what	
by	how	one	them	when	

Keyword default values

The following keyword searches are available as the delivered defaults.

Option	Search	Description
Keyword (With All Words)	Standard	<p>Enter <i>all</i> the words you want to find. The search uses AND logic. Sections returned contain <i>all</i> of the words entered.</p> <p>For example, if you enter <code>History American</code>, only classes with both “History” and “American” in any of the fields searched by keywords are returned, such as Latin American History, History of the American West, or American Cultures with a subject description of History.</p>
Keyword (With Any Word)	Advanced	<p>Enter <i>any</i> of the words you want to find. The search uses OR logic. Sections returned contain <i>at least one</i> of the words entered.</p> <p>For example, if you enter <code>History</code>, any classes with “History” in any of the fields searched by keywords are returned.</p> <p>If you enter <code>History Math</code>, any classes with “History” or “Math” in any of the fields searched by keywords are returned.</p>
Keyword	Standard	<p>Enter <i>partial</i> words you want to find. The search returns sections that match the <i>partial</i> keywords entered.</p> <p>For example, if you enter <code>intro ology</code>, any classes with “intro” and “ology” in any of the fields searched by keywords are returned, such as Introduction to Sociology and Introduction to Cultural Anthropology.</p>
Keyword (Exact Phrase)	Advanced	<p>Enter the <i>exact</i> phrase you want to find. Sections returned contain the <i>exact</i> phrase entered.</p> <p>Do not use any special characters in the exact phrase.</p> <p>For example, if you enter <code>Introduction to</code>, any classes with that phrase are returned, such as Introduction to Accounting, Introduction to Math.</p>

Option	Search	Description
Keyword (Without The Word)	Advanced	<p>Enter the word you do <i>not</i> want to find. This option <i>must</i> be used with another Keyword search field, such as All, Any, Partial, or Phrase.</p> <p>Sections returned contain the words entered in the Keyword (With Any Word) and Keyword (With All Words) fields but do <i>not</i> contain the word entered here.</p> <p>For example, if you enter <code>History</code> as any keyword and <code>American</code> as the word to exclude, the search returns sections with “History” in any of the fields searched by keywords, but none of the sections returned includes “American”.</p>

Search on CRN

The keyword fields can also be used to quickly find sections for which you know the course reference number or CRN. Enter a known CRN in the Any or All keyword fields to return that CRN in the search results. (Other sections may be displayed in the results as well, if they contain the same number in another field that is checked by the keyword searching logic.)

For example, if you are looking for CRN 101, and you enter 101 in the Any or All keyword fields, you will find CRN 101, but courses will also be returned for various subjects with the course number of 101.

Once the search results are returned, you can use the sort functionality within the grid to locate the desired CRN more quickly.

Customize search options

Keyword searches are part of the basic and advanced search functions. You can customize the options in the basic and advanced searches by editing the display properties on the Overall Page and Field Configuration Page (SOAWSCR).

- You can reorder the fields, modify the field labels, and hide fields not used at your institution.
- You can also move fields from the basic search to the advanced search and from the advanced search to the basic search.
- Do not use special characters in field labels.
- Do not set a field to display multiple times.

Queries and commands

The table changes, indexes, and database triggers used to support the Class Schedule and Course Catalog keyword searches were delivered with the Banner Student 8.6 release. The technical information is documented here, because only Banner Student Registration 9.x uses this functionality. This section contains information on index maintenance, SQL query patterns, and commands used with the keyword searches.

When you are testing keywords, and an indicator on SOATERM is changed, the section record or records to be found must also be changed and resaved in order for the keyword search to retrieve the desired records.

Usually, settings on SOATERM are defined and left as they are. However, if during testing settings need to be turned on or off, you can run the drop script and the create index script for a particular index to refresh the records and allow the keyword searches to pick up the correct records. These scripts may take a few minutes to execute.

Synchronize Class Search full text script

Using the SATURN ID, run the `ssbsect_fti_sync.sql` script to synchronize the index. The script is delivered with the baseline release as part of the PLUS directory.

The contents of the script are:

```
whenever sqlerror continue;
Begin
    ctx_ddl.sync_index('ssbsect_ss_idx');
    CTX_DDL.OPTIMIZE_INDEX('ssbsect_ss_idx','FULL');
end;
/
whenever sqlerror exit rollback;
```

The Class Search full text index is delivered with a manual synchronization. Oracle provides synchronization upon commit, either manually or within an interval. The full text index on the SSBSECT table is delivered to synchronize manually, so the registration process that updates enrollment counts on SSBSECT is not impacted. Each time a student registers for a class, the class enrollment counts are updated on SSBSECT.

A second `ssbsect_fti_sync_job.sql` script is delivered with the baseline release in the PLUS directory. This script is used to schedule the synchronization process. The default synchronization is each day at 3:00 AM. The default can be changed according to your site-specific synchronization interval requirements.

The Course Search full text index is scheduled to synchronize upon commit. The SCBCRSE table does not have frequent commit processing, and the synchronization will not delay registration processing.

Examples of SQL Queries using Oracle Full Text Index

Here are examples of how to query data using the full text index.

Example 1

Query rows for any value with “History”, “Art”, “Management”:

```
Select * From sbssect Where Sbssect_Term_Code = '201410'  
And Contains(Sbssect_keyword_index_Id, '(History OR Art OR Management)'  
) > 0 ;
```

Example 2

Query rows for all values with “History”, “Art”, “Management”:

```
Select * From sbssect Where Sbssect_Term_Code = '201410'  
And Contains(Sbssect_keyword_index_Id, '(History AND Art AND Management)'  
) > 0 ;
```

Example 3

Query rows that contain “Art” but do not contain “History”:

```
Select * From Sbssect Where Sbssect_Term_Code = '201410'  
And Contains(Sbssect_keyword_index_Id, 'art~History' ) > 0 ;
```

Example 4

Query rows that have the partial value of “Hist”:

```
Select * From sbssect Where Sbssect_Term_Code = '201410'  
And Contains(Sbssect_keyword_index_Id, '(%hist%)' ) > 0 ;
```

Oracle Full Text Index maintenance SQL commands

The following may only be used with an Oracle ID that has the necessary permissions to execute the CTSYS package.

Describe the index

```
Set Long 10000  
Select ctxsys.Ctx_Report.Describe_Index('saturn.SSBSECT_SS_IDX') From  
Dual;
```

Find rows pending synchronization

```
Select Pnd_Index_Name, count(*) From Ctxsys.Ctx_User_Pending GROUP BY  
Pnd_Index_Name;
```

Synchronize all full text indexes

This script must be run by SATURN or the owner of the index.

```
Declare
  Cursor Pending Is
  Select Pnd_Index_Name
        From Ctxsys.Ctx_User_Pending
        Group By Pnd_Index_Name;
  Pending_Index Varchar2(32);
Begin
Open Pending;
Loop
  Fetch Pending Into Pending_Index;
  Exit When Pending%Notfound;
  ctx_ddl.sync_index(pending_index);
  Ctx_Ddl.Optimize_Index(pending_index,'FULL');
End Loop;
Close Pending;
commit;
End;
/
```

Set up nightly synchronization job

The following SQL must be run using SATURN and is used to set up the nightly job to synchronize the SSBSECT full text index. This script is present in the `ssbsect_fti_sync_job.sql` script. Note that CTXSYS package may need to grant an execute on the CTX_DDL to SATURN.

```
whenever sqlerror continue;
DECLARE
  l_job NUMBER := 0;
Begin
  DBMS_JOB.SUBMIT(l_job,'begin
Ctxsys.ctx_ddl.sync_index(''ssbsect_ss_idx'');
CTX_DDL.OPTIMIZE_INDEX(''ssbsect_ss_idx'', 'FULL');end ;'
, trunc(sysdate) + 3/24, trunc(sysdate) + 3/24+ 1');
END;
/
commit;
whenever sqlerror exit rollback;
```

Find scheduled jobs and to remove a job

```
SELECT to_char(sysdate, 'DD-MON-YYYY HH24:MI:SS' , job,
        what, next_date, next_sec FROM user_jobs;
```

```
Execute Dbms_Job.Remove(job#);
```

Search results for Browse Course Catalog

When a search is performed for any of the keyword fields in Browse Course Catalog using the long course title, course description, course text, and course attributes, the search returns results after searching across all effective terms for a specific subject and course number. Some searches will pass, and some will fail.

For example, a course has a subject code of ACCT and a course number of 100.

- This course has a long title of “Introduction to Accounting” for the effective term of 201410.
- The course also has another long title of “Intermediate Accounting” for the effective term of 201610.

Subject	Course Number	Effective Term	Long Course Title
ACCT	100	201410	Introduction to Accounting
ACCT	100	201610	Intermediate Accounting

Here are some sample search scenarios using course long title. These examples also apply to searches on long course description, course text, and course attributes.



Note: Keyword searches do not take into account the **Display Long Course Title** and **Display Long Course Description** indicators in the Catalog Search Controls section of SOATERM.

For the search term of 201310:

- The keyword search on the long title of “Introduction to Accounting” will not present any results. This search scenario passes.
- The keyword search on the long title of “Intermediate Accounting” will not present any results. This search scenario passes.

For the search term of 201510:

- The keyword search on the long title of “Introduction to Accounting” will present the subject and course number ACCT 100. This search scenario passes.
- The keyword search on the long title of “Intermediate Accounting” will also present the subject and course number ACCT 100. However, this is not correct, and this search scenario fails.

For the search term of 201710:

- The keyword search on the long title of “Intermediate Accounting” will present the subject and course number ACCT 100. This search scenario passes.
- The keyword search on the long title of “Introduction to Accounting” will also present the subject and course number ACCT 100. However, this is not correct, and this search scenario fails.

Search pages

Advanced filtering is available for searches on the following pages:

- Person Search Page (SOAIDEN)
- Person Search Detail Page (SOAIDNS)
- Non-Person Search Page (SOACOMP)
- SSN/SIN Alternate ID Search Page (GUIALTI)
- General Search Page (GUISRCH) - Telephone, Email, Additional ID
- Registration Section Query Page (SFQSECM)

The SOAIDEN, SOAIDNS, SOACOMP, GUIALTI, and GUISRCH pages are filter pages used with specific data searches. The pages can be accessed from the **ID** fields on 9.x pages.

The Registration Section Query Page (SFQSECM) is a filter page used with section searches for registration. This page can be accessed from SFASRPO.

These pages are documented in the *Banner Student 9.x Online Help*.

Search tips

Here are some tips on how to use the person and non-person search functionality.

Autocomplete on ID and name

When up to four characters are entered in the **ID** field or the **Name** field in Self-Service pages, the autocomplete function displays potential matches for the value entered. You can select a value to populate the **ID** field and **Name** fields. For the **Name** field, if a name or partial name is entered, the order of names returned is based on the matching order of last name, first name, middle name. Autocomplete display for ID and name can be used on pages that allow for advanced searches on persons and non-persons. The autocomplete feature can be optionally disabled for the **ID** and **Name** fields using the following rules on the Cross Walk Validation Page (GTVSDAX).

External Code	Internal Code	Internal Code Sequence Number	Internal Code Group	Description
YES, NO	ID_AUTO	1	IDNAMESEARCH	Autocomplete on ID field ON
YES, NO	NAME_AUTO	1	IDNAMESEARCH	Autocomplete on Name field ON

ID_AUTO rule

The ID_AUTO rule allows you to disable the autocomplete function in the **ID** field on Banner 9.x pages. This rule applies to all **ID** fields that have advanced ID and Name search capability.

- When the **External Code** is **NO** for the rule, the autocomplete dropdown will not open as the user types characters into the **ID** field.
- When the **External Code** is **YES** for the rule, the autocomplete dropdown will open as the user types characters into the **ID** field, when multiple records exist that match the value entered.

NAME_AUTO rule

The NAME_AUTO rule allows you to disable the autocomplete function in the **Name** field on Banner 9.x pages. This rule applies to all **Name** fields that have advanced ID and Name search capability.

- When the **External Code** is **NO** for the rule, the autocomplete dropdown will not open as the user types characters into the **Name** field.
- When the **External Code** is **YES** for the rule, the autocomplete dropdown will open as the user types characters into the **Name** field, when multiple records exist that match the value entered.

Advanced filter on ID and name

You can use advanced filtering to query on IDs for persons and non-persons. Users must be granted access to the SSN_SEARCH special security object to view and use the **SSN** field for the advanced filter.

The **SSN** field on the advanced filter is displayed only if the user has permission for the SSN_SEARCH object and is not prevented by a masking rule from seeing the **SSN/SIN/TIN** field in the ID and Name Results window. The **SSN/SIN/TIN** field in the window can have masking applied as described in the “ID and Name Results Window” section below. If a masking rule has been applied to the field in the Query Results section of the page, the user will also be prevented from searching on this field in the advanced filter.

Operators

When performing a person search using the **Equals** operator for the **Last Name** and **First Name** fields, the results returned are only for an exact match to the data entered, including spaces and special characters. For example, if the **Last Name** equals Oleary, results would include Michelle Oleary but not Joseph O’Leary.

Other operators for first and last names generate results that include names with spaces and special characters, regardless of whether those spaces and/or special characters have been entered for the search. This is the case with the **Contains** operator. For example, if the **Last Name** contains Oleary, results would include both Michelle Oleary and Joseph O’Leary.

You can enter a pattern of characters in the **Last Name** and/or **First Name** fields and use the Sounds Like operator. This helps when you are not certain of the spelling of a name. As long as the first letter of the search string is correct, the results will return names with a similar pattern of characters.

Sort order

Person search results are displayed based on the following sort order: Last Name, First Name, Surname Prefix, Middle Name, ID, and Change Indicator. This list of results can be resorted on a column of your choice.

Wildcards

You can use wildcards in the **Name** field for searches, but they are not required. The underscore wildcard cannot be used to search on names.

Name formatting

The name format can be set at your institution in the `message.properties` file for each application. The name format defines which parts of the name are displayed, in what order, with what punctuation, and how many characters of each name element are displayed for the name, to the right of the **ID** field.

The key is `default.name.format`. The elements that can be used to define the name format are:

- Last name=`$lastName`
- First name=`$firstName`
- Middle name=`$mi`
- Name Suffix=`$nameSuffix`
- Name Prefix=`$namePrefix`
- Surname prefix=`$surnamePrefix`

Some examples of name formats are:

- `default.name.format=$lastName, $firstName`
- `default.name.format=$firstName $lastName`
- `default.name.format=$surnamePrefix $lastName, $firstName`

Other options are available for name formatting such as:

- Upper/lower case – append `toUpperCase()` and `toLowerCase()` to the end of the element.

For example, to show the entire last name in upper case:

```
default.name.format=<%=lastName.toUpperCase()%>,
<%=firstName%>
```

- Display a specific number of characters – append [first position..last position] to the element.

For example, to show the first five characters of the last name (all lower case) and the first name in the case that it is saved in the database and separated by a comma:

```
default.name.format=<%=lastName[0..4].toLowerCase()%>,  
<%=firstName%>
```

ID and Name Results window

In addition to using the advanced filter and query results for searches, you can also use the ID and Name Results window to refine your searches for persons and non-persons and perform extended searches.

When you enter a full or partial ID in the **ID** field or a full or partial name in the **Name** field and use Enter or Tab, and more than one person or non-person record exists with that ID or name, the ID and Name Results window is displayed for extended searching. You can use wildcards in the **Name** field for searches, but they are not required. The underscore wildcard cannot be used to search on names.

When you enter data in the **Name** field, each space-delineated group of characters is used to search on last name, first name, and middle name. You do not have to enter the name parts in any specific order or with any punctuation. For example, if you enter *Mary Jane Smith*, the search performed will look for *Mary* as a last name, first name, or middle name that has *Jane* as a last name, first name or middle name, and that has *Smith* as a last name, first name, or middle name.

The ID and Name Results window displays the records for the persons and non-persons returned by the search. You can use the advanced filter in this window to further narrow down your results. You can sort on, hide, reorder, or freeze columns. A person or non-person can be listed multiple times if alternate names or IDs exist. However, each person or non-person is only counted once. The count of total records, including alternate names and IDs, is displayed in the window.

You can select a record and click **OK** to populate the **ID** and **Name** fields in the Advanced Filter. Or you can adjust your search in this window by entering a different full or partial ID or name. Use Enter or Tab to perform the new search. For example, if you searched on the name of *Smith* and viewed your results, you could then enter *Smythe* and search again.

Data masking

Masking can be applied directly to the ID and Name Results window through the GUQSRCH ID/Name Extended Search object, and can then be used with extended ID and name searches. Any masking rule applied to window will be available in the ID and Name Results window throughout the application, no matter which page is used to access the window. To find the field information for masking, open the ID and Name Results window and use the Item Properties key stroke ALT+I. If a field has a masking rule applied, the item will not be available for searching on the advanced filter.

Here is an example of a rule that can be used to mask the **Birth Date** field on the ID and Name Results window.

On the Data Display Mask Columns Page (GORDMCL) the following record is needed:

Field	Value
Object	GUQSRCH
Block	Banner9
Item	Banner9
Data Type	Character
Length	60

On the Data Display Mask Rules Page (GORDMSK) the following record is needed:

Field	Value
Object	GUQSRCH
Block	extendedSearchBlock
Item	birthDate
Banner9 Object Name	extendedsearch
Banner9 Block ID	extendedSearchBlock
Banner9 Item ID	birthDate
Visible	Unchecked (No)
All Users	Unchecked (No)
User ID	Test User ID (update to your tester's user ID)

Data masking

Data masking is designed for administrative Banner masking only, not for Self-Service Banner. However a special entry with an object type of ****SSB_MASKING** can be used to enable the display of the last name prefix on the Banner Student Registration 9.x Self-Service pages accessed using the Register for Classes, Browse Classes, and View Registration Information paths. The only masking option used is the display indicator.



Note: This does not apply to the Name and ID Search for students on the Select a Term page in Self-Service.

The rules for changing the display of the last name prefix are as follows.

- Records are needed on the Data Display Mask Column Page (GORDMCL).
- Records are needed on the Data Display Mask Rules Page (GORDMSK).

On the Data Display Mask Columns Page (GORDMCL), the following record should exist.

Field	Value
Object	**SSB_MASKING
Block	F_FORMAT_NAME
Item	SPRIDEN_SURNAME_PREFIX
Form Item Data Queried Into	F_FORMAT_NAME
Data Type	Character
Length	60
System Required	Checked (Yes)

On the Data Display Mask Rules Page (GORDMSK), the following record should exist and can be updated to change the visibility.

To display the last name prefix on the Banner Student Registration 9.x Self-Service pages, the **Visible** indicator should be updated to checked (Y).

Field	Value
Object	**SSB_MASKING
Block	F_FORMAT_NAME
Item	SPRIDEN_SURNAME_PREFIX
Visible	Unchecked (No)
All Users	Checked (Yes)



Note: A name format exists in the `message.properties` file. You can modify the `default.name.format` to include or exclude name elements.

```
default.name.format=$surnamePrefix  
$lastName,$firstName $mi
```

Please see the *Banner Student Registration Installation Guide 9.x* for information on updating the `message.properties` file while deploying the WAR file.

Data masking and extended searches

Masking can be applied directly to the ID and Name Results window through the GUQSRCH ID/Name Extended Search object. This can then be used with extended ID and name searches. Any masking rule applied to window will be available in the ID and Name Results window throughout the application, no matter which page is used to access the window. To find the field information for masking, open the ID and Name Results window and use the Item Properties key stroke ALT+I. If a field has a masking rule applied, the item will not be available for searching on the advanced filter.



Note: This does not apply to the Name and ID Search for students on the Select a Term page in Self-Service.

A GORDMCL record is delivered for use with object records on the GORDMKS page. Scripts are delivered to: insert the record into GORDMCL, insert the object record into GUBOBS, and insert the GUBPAGE record for `EXTENDED_SEARCH` into the GORDMKS page.

iCalendar File

The iCalendar File can be used with Banner 9.x. This file is a universal calendar format used by email and calendar programs (such as Microsoft Outlook, Google Calendar, and Apple iCal). It allows you to publish and share calendar information on the Web and through email. It can also be used to send meeting event requests which can be imported into your own calendar.

iCalendar .ICS files are saved in a plain text format. The files contain information such as the event title, summary, start time, and end time. You can also update or cancel events.

Information text

Information text can be used in Banner Student 9.x Self-Service Registration. It can be displayed as default or localized text and can specifically be configured for display in Banner General 8.x. Some text types can be modified by administrative users.

Configure Information Text

You can use the Information Text Editor Page (GUAINFO) to configure text messages for display on Self-Service pages. Text message types are categorized as follows:

- Notifications
- Tool tip
- Panel
- Header
- Normal



Note: Refer to the *Banner Student Registration Installation Guide 9.x* for information on setting up roles in Web Tailor and editing the `banner_configuration.groovy` file for supported locale entries.

Each informational text message displayed on a Self-Service page is associated with a **Message Label** value or key, which is delivered as seed data for the baseline record. The display of the text message can be restricted based on the target audience or persona. The text message can also be displayed in multiple languages depending on the locale specified on this page. Each text message has a start and end date. If end date is not specified, the text message will continue to be displayed on the Self-Service page.

Use the **Sequence Number** value to display multiple text messages in sequence for each audience or locale. For example, if there are three text messages to be displayed, the text message with sequence number 1 will be displayed first, the text message with sequence number 2 will be displayed second, and the text message with sequence number 3 will be displayed third.

The **Source Indicator** value of `Baseline` is selected as the default value, and a default text message is provided as seed data. To create a customized message, copy the baseline record and update the **Source Indicator** value to `Local`.

- The local text will be displayed if the current date is between the start and end date on the local record, and text has been entered in the **Message** field.
- The baseline text is displayed when no local record exists, or when the current date is not in the range of dates specified on the local record.
- No text is displayed for the message when a local record exists and the message is blank, or when the local record has blank start and end dates.

Perform the following steps to configure a text message to be displayed on a Banner Self-Service page:

1. Access the Information Text Editor Page (GUAINFO).
2. Select a row and copy it.

Field behavior is as follows:

- **Page Name** - value is copied, do not update
- **Message Label** - value is copied, do not update
- **Source Indicator** - value is copied and defaults to `Local`
- **Audience** - value is copied and can be updated.

The delivered value is `DEFAULT`. If you need messages that are specific for a persona, copy the information text record and specify the appropriate role, such as `REGISTRAR`, `STUDENT`, etc.

- **Locale** - value is copied and can be updated
- **Sequence Number** - value is copied, do not update

This is only updated when additional sequences are added for the message label, audience, and local combination.

- **Text Type** - value is copied, do not update
- **Message** - user may update the text to customize it
- **Comment** - user may add a comment to provide information about the message
- **Start Date** - user may specify the date to begin the text display
- **End Date** - user may specify the date to end the text display

3. Save the changes.

Update Information Text

Specific kinds of Information Text can be modified by administrative users.

- Tool tips, which are context sensitive and used for assistance with fields.
- Notification Center messages, when time sensitive and require a user response such as clicking `OK`.
- Right side panels, such as Getting Started, which present information and instructions to the user. (This type of text is no longer configured in Banner Web Tailor.)
- Header, which is used for titles on tabs or page sections.
- Normal, which is used for any other text on the page.

Registration pages with Information Text

The information text that is configured on GUAINFO can be used on the following pages for Banner Student Registration 9.x:

- Register for Classes path, Select a Term page
- Find Classes page
- Plan Ahead path, Select a Term page
- Terms of Usage page
- Security Questions and Answers page
- Race and Ethnicity Survey page
- Update Student Term Data page

Setting 8.x Web Tailor globals

Web Tailor global variables in Banner 8.x can be set from the Banner Student 9.x Registration application.

The parameters are inserted into the Web Tailor Parameter Table (TWGRWPRM) before the user exits from Banner 9.x. This allows the Banner Self-Service 8.x page to retrieve the values from the table and perform validation. This functionality is housed in the `RegistrationControllerUtility`.

Customized message display

When a customized error message is coded on SFARMSG and HTML commands are embedded in the message, the text will be displayed in the Notification Center in encoded format. The same is true for the display of customized labels from SOAWSCR where HTML commands are embedded in the label text.

For example, a message from SFARMSG could read *ACCT 101 CRN 10319: Long custom message for <i>prerequisite</i> and testscore error *.

Application Navigator

Application Navigator facilitates seamless navigation between Banner 8.x forms and Banner 9.x administrative pages, allowing them to behave like a single application. Application Navigator includes a unified menu and the ability to perform a unified search,

and it uses a common authentication mechanism to provide an integrated user experience. Users can navigate between the Banner modules using a single interface.

The unified menu displays the existing Banner Student 8.x administrative menu system and is provided in addition to the **Go To...** and **Related to Current** list of pages used in Banner 9.x. The unified menu panel is displayed on the left side of the page and can be opened and closed. You can navigate up and down the menu tree in this panel and refer to the **Recently Opened** list.

The unified menu is displayed when the **Integrated** indicator for the module and URL combination is checked on the Banner9 Module and Page Maintenance Page (GUAPAGE). The settings in **Banner8/Banner9 Display Option** field on the Object Maintenance Page (GUAOBS) determine whether a page is displayed in Banner 9.x and which version of a page is displayed when it is selected from the unified menu.

See the *Application Navigator Handbook* for detailed information on setting up and using this software component.



Note: Application Navigator is delivered and installed separately from the Banner administrative applications.

Banner 9.x applications contain a parameter in a configuration file that must be updated to integrate with Application Navigator.

For specific information on installing and configuring Application Navigator, refer to the *Application Navigator Installation Guide 1.x*.

Extensibility tools

The Banner Extensibility tools enable you to make changes to your Banner 9.x applications without having to change the source code. The Extensibility tools available to you as part of this release are the Configure Page Components Tool for ZK Applications and the Domain Extension Tool. For more information on the Banner Extensibility Tools, see the Banner Extensibility Documentation Library in the Ellucian Support Center.

The Configure Page Components Tool is embedded in the application, but additional installation steps must be taken to enable its functionality.

The Domain Extension Tool requires application source code and is only available via the Ellucian source code repository. If you want to use this tool, you will need to establish a development environment and request access to the repository. More information can be found in the *Domain Extension Tool for Developers Handbook*.

If you want to use either of these tools, you may need to check with the person who completed the installation of the application to make sure they took the additional steps to enable the Extensibility tools.

See the appendix in this handbook for more information.

Configure Page Components Tool for ZK Applications

The Configure Page Components Tool for ZK Applications enables you to customize delivered user interface common components and add new common components onto a page. You can hide fields that are not required, change the field type of delivered fields (within the bounds of the database functionality), and change the characteristics of fields.

The tool is designed to be used primarily by a business analyst or functional application expert. The user should be someone who understands the application and basic relational database concepts. Users with the proper security can access the Configure Page Components Tool directly from the Tools menu on the Banner 9.x page they want to change.

Domain Extension Tool

The Domain Extension Tool enables you to make changes to a domain without having to change the Ellucian source code. It is intended to be used by an experienced developer.

Registration Setup and Use

This chapter discusses setting up Registration for standard processing and using features that work differently than in Banner Student 8.x.

Student Course Registration Page (SFAREGS)

***Important note for SFAREGS** - Use the SFAREGS page in Banner 8.x for registration processing. An administrative registration display of course information exists in 9.x Student Self-Service. This registration view can be accessed and updated by users with the REGISTRAR persona, but it does not contain full processing functionality.*

Overview

The topics in this chapter include:

- configuring search criteria, pages, and fields
- reviewing configuration seed data
- using registration models
- setting indicators for adds and drops
- using permit-overrides
- setting up bookstore links
- using email and print schedule functions
- setting up and using personas
- searching on names and IDs
- using holds notifications
- understanding the **Copy** button

Administrative pages and tables

The following pages are used specifically with Banner Student 9.x basic registration.

- Persona Rules Page (SOAPERS)

- Term Control Page (SOATERM)
- Overall Page and Field Configuration Page (SOAWSCR)
- Persona Validation Page (STVPERS)
- Overall Configurable Page Field Validation Page (STVWSFD)
- Overall Configurable Page Validation Page (STVWSPG)

The following tables are used specifically with Banner Student 9.x basic registration.

- Student Registration Messages Table (SFRRSCM)
- Registration Student Term Version Table (SFRREGV)
- Temporary Registration UI Table (SFTREGV)
- Persona Rule Table (SORPERS)
- Overall Page and Field Configuration Table (SORWSCR)
- Persona Validation Table (STVPERS)
- Overall Configurable Page Validation Table (STVWSPG)
- Overall Configurable Page Field Validation Table (STVWSFD)

Configure search criteria and results

In Banner 9.x you can define and configure the class search criteria and results used on the Self-Service Registration pages. Search criteria elements can be configured by term. You can select the display of and display order of the elements. You can also define the search criteria displayed based on the persona of the user (such as a student, a faculty member, an administrator, and so on). Element labels can be customized.

The Overall Page and Field Configuration Page (SOAWSCR) is used to define Self-Service page and field text configurations for your institution. In Banner 9.x, this page takes the place of the Schedule Search Controls (search by schedule type, campus, level, course attribute, instructor, sessions, instructional method, duration) on the Term Control Page (SOATERM). SOAWSCR can be found on the Overall Configuration Menu (*SRCHCONF), accessed from the Registration Menu (*Registration).



Note: The search controls are still used on SOATERM in Banner 8.x. The SOBTERM table has not been modified. The values in the columns on SOBTERM are ignored when the SOAWSCR page is implemented.

Refer to the *Banner Student 9.x Online Help* for section and field details for the pages used with configuration.

When configuration changes are made on SOAWSCR, you must exit from the application and log back in to see the changes take effect.

Overall Page and Field Configuration Page (SOAWSCR)

Here is a more detailed look at SOAWSCR. This page is used to maintain the registration page and field configuration definitions for your institution. Page elements are delivered as seed data. You can specify a persona, a page, and an effective term related to the fields that are available for configuration on a Self-Service Registration page. You can also define if an item is required, if an item is displayed, the display order of the fields on the page, and customized display text for the field labels. The customized label text is used instead of the delivered text. At least one item must be displayed for each Self-Service Registration page.

You cannot create or delete records on this page. You can modify seed data records. When a record is system required, you can edit information only for the **Display Number**, the **Required** indicator, the **Displayed** indicator, and the **Custom Display Text** field. When the **Required** indicator is checked, the **Displayed** indicator must also be checked and cannot be changed. When the **Displayed** indicator is unchecked, the **Display Number** is blank.



Note: You can use the Data Extract option to save your data to an Excel spreadsheet.

To use this page you need to set up page configuration codes on the Overall Configurable Page Validation Page (STVWSPG) and page field configuration codes on the Overall Configurable Page Field Validation Page (STVWSFD). The pages can be found on the Validation Form Sub Menu [STVTRCN - STVXLBL] (*STDVALD3G). Seed data is delivered for these pages.

- The Overall Configurable Page Validation Page (STVWSPG) is used to define Self-Service Registration pages, sections of pages, and page panels that allow the use of configurable fields.
- The Overall Configurable Page Field Validation Page (STVWSFD) is used to define the fields that can be configured on the Self-Service Registration pages.

Configuration rules can be copied from an existing term to a term that does not have any rules. Persona configuration information can be copied from one rule to a new persona rule.

Fields that are configurable, such as those used for search criteria and displayed in the page grids, are defined on STVWSPG. The code values are named in the same manner as program variables in order to be easily understood within the program.

Code values are system-required, and the user will never see the values unless he/she works in the actual program. Other validation tables also use “English-like” codes that are not used for displayed text descriptions. On SOAWSCR, you can customize the field label text associated with the field code values, rearrange the field display order by sequence number, and hide fields you do not wish to display by unchecking the **Displayed** indicator.

The default field labels are delivered in the `message.properties` files and the supported language versions of these files. The service that displays the field labels looks for a custom value defined in the **Custom Display Text** field (`SORWSCR_DISPLAY_TEXT`) for the field to be displayed. If a custom value is found, it is used for the field label. If a custom value is not found, the value from the `message.properties` file is used.

The `sb_pagefieldconfig` API is used with SOAWSCR to maintain Self-Service registration page and field display configuration definitions.

Review seed data

You can view seed data for the following tables using SQL. These tables contain large amounts of seed data.

Registration Configuration Table (SORWSCR)

Seed data is delivered for this table for all pages, fields, and personas. Data is also provided for class searches and course searches. This data is used with the SOAWSCR page.

For a full list of the required data, run the `sscossorwscri.sql` create script. This script can be found in the upgrade build folder.

Next, run the following SQL script to return all system required values.

```
select sorwscr_wspg_code, stvwspg_desc,
       sorwscr_pers_code, stvpers_desc, sorwscr_wsfd_code,
       sorwscr_display_ind, sorwscr_required_ind
from stvpers, stvwspg, sorwscr
where sorwscr_system_req_ind = 'Y'
and stvpers_code = sorwscr_pers_code
and stvwspg_code = sorwscr_wspg_code
order by sorwscr_wspg_code, sorwscr_pers_code, sorwscr_wsfd_code;
```

Overall Configurable Page Validation Table (STVWSPG)

Seed data is delivered for this table for use with the SOAWSCR page. To review the system required values, use the following code.

```
select * from stvwspg where stvwspg_system_req_ind = 'Y' order by
stvwspg_code;
```



Note: The Registration Landing page code of 1000 only looks at term 000000.

Overall Configurable Page Field Validation Table (STVWSFD)

Seed data is delivered for this table for use with the SOAWSCR page. To review the system required values, use the following code.

```
select * from stvwsfd where stvwsfd_system_req_ind = 'Y' order by stvwsfd_code;
```

Here are some notes regarding data for this table.

- The Faculty Card uses the following codes: facultyAddress, facultyCardPopup, facultyDepartment, facultyEmail, facultyName, facultyPhone, facultyPhoto, and facultyTitle.

You can choose to not display the Faculty Card. However, the card will still appear if the user clicks on the link, but it will not contain faculty information. A message is displayed indicating that the faculty information is not available.

- The preferredPlan code cannot be removed from display on pages 400 (Planning My Summary), 410 (Plan Ahead Select a Student Plan), and 430 (Register for Classes Student Plans).
- The schedule type information (scheduleType code) is always displayed as part of the title information when the **Displayed** indicator is checked on SOAWSCR. The setting of the **Display Number** field does not have any effect on the display order on the page.

Set up registration models

You can use simultaneous registration model settings for basic registration, structured registration, and projected registration. Registration model settings can be turned on or off by term. You can associate a CAPP program definition with a specific registration model by term.

The registration model configuration you wish to use for processing is set up on the Term Control Page (SOATERM) in Banner 9.x and Program Requirements Form (SMAPROG) in Banner 8.x. The settings on SOATERM and SMAPROG determine what registration tabs are displayed to the student in Self-Service for the term and program.

Term

The Registration Model section in the Term Information options on SOATERM contains registration model indicators for **Basic**, **Structured**, and **Projected**. The **Basic** indicator is checked as the default setting for the term.

The registration model indicators allow you to define which models are allowed for a term. At least one selection is required or an error is displayed. Multiple models can be selected for a term. The settings can also be copied from one term to another.

Program

The **Registration Model Code** radio group on SMAPROG is used to select the registration model to be used with the program in the Key block. The values are *Basic*, *Structured*, and *Projected*. The default is *Basic*. Only one option can be selected, but you can set up different options by from and to term ranges for the program.

Examples

A program can have a different registration model for use in different terms.

Program BA-MATH

- Term 201510 - Basic registration
- Term 201520 - Projected registration
- Term 201530 - Structured registration

Different programs can use different registration model settings within the same term.

Term 201530

- Program BA-MATH - Structured
- Program BA-History - Basic

Self-Service

When a student logs in to Self-Service, selects Register for Classes, and then selects a term, the page and tabs displayed are based on the settings on SOATERM and SMAPROG. The student can proceed through the registration path that is presented.

- When the student's program is set up for basic registration for the term, the Class Search and Registration page is displayed with the Find Classes, Enter CRNs, and Schedule and Options tabs.
- When the student's program is set up for projected registration for the term, the Class Search and Registration page is displayed with the Find Classes, Enter CRNs, Projections, and Schedule and Options tabs. (The Plans tab is also displayed when registration planning is in use.)
- When the student's program is set up for structured registration for the term, the Class Search and Registration page is displayed with the Structured and Schedule and Options tabs.

Set up add and drop controls

Indicators in the Self-Service Options section of the Term Control Page (SOATERM) take the place of Crosswalk Validation Page (GTVSDAX) rules previously used to process

conditional add and drop, drop last class, auto drops, and administrative drops. These indicators are only used in Banner 9.x.

If these indicators are not used, the GTVSDAX rules will be used instead. For example, if the value for **Allow Student to Drop their Last Class** is `NULL`, and the `WEBDROPLST` rule is set to `Y` or `N`, that value will become the default.

SOATERM indicator	GTVSDAX rule
Allow Student to Select Conditional Add Drop	CONDADDDRP
Allow Student to Drop their Last Class	WEBDROPLST
Auto Drop, Connected Course, Drop Errors	AUTODROP
Administration Drop Connected Course Errors	ADMINDROP

Please refer to the “Automatic Drops” section of the “Registration” chapter in the *Banner Student Self-Service 8.x User Guide* for information on using autodrop processing.

Here are the details for these SOATERM indicators.

Fields	Descriptions
Allow Student to Select Conditional Add Drop	<p>Check box used to indicate whether students can use conditional adding and dropping during registration in Self-Service.</p> <p>This is used when an error occurs after the student submits registration selections. The entire registration process is cancelled, even if other classes submitted for registration do not have any errors. When this indicator is not checked, classes without errors can still be processed for registration.</p> <p>Values are saved to the database as <code>Y</code> or <code>N</code>.</p>
Allow Student to Drop their Last Class	<p>Check box used to indicate whether students can drop their last class during registration in Self-Service.</p> <p>Values are saved to the database as <code>Y</code> or <code>N</code>.</p>

Fields	Descriptions
Auto Drop Connected Course Drop Errors	<p>Radio group used to indicate how automatic drops should be processed during registration in Self-Service.</p> <p>When the student submits the registration selections and then tries to drop one class from a pair of classes with a link, corequisite, or prerequisite, an error is received, but other registration selections can still be processed.</p> <p>Choices are:</p> <ul style="list-style-type: none"> • Drop Connected Course - Both classes are automatically dropped. Saved to the database as Y. • Do Not Drop, Display Error - The student receives an error, but there is no automatic action taken by the system. Saved to the database as N. • Confirm to Drop - The student receives a message asking if the other class in the pair can be automatically dropped. Saved to the database as C. • Allow Connected Drops - The student can drop any class, even if it is a linked course, a corequisite, or a prerequisite. No cross checking is performed for the missing connected class. Saved to the database as I.
Administration Drop Connected Course Errors	<p>Radio group used to indicate how administrative drops should be processed during registration in Self-Service.</p> <p>When the student first comes into registration after selecting a term, if the student has registration errors that are from a connected class, the class is automatically dropped. The student has no control over this drop event.</p> <p>Choices are:</p> <ul style="list-style-type: none"> • Drop - The class is automatically dropped. Errors are reported in the SFTRGAM table. Saved to the database as Y. • Do Not Drop, Report in Administrative Error Table - An error is reported, but there is no automatic action taken by the system. Errors are reported in the SFTRGAM table. Saved to the database as N. • Do Not Report and Do Not Drop - No error is reported, and no automatic action is taken by the system. Saved to the database as I.

Permit-overrides

Permit-overrides are applied to a student's registration record in Banner 9.x when a student initiates registration for a class in Banner Student Self-Service. Existing permit-overrides from Banner 8.x are applied when a student initially adds a class to his/her registration record or re-registers for a class after it was dropped, and the drop was not a drop/delete. In this case, the administrator may have added the permit-override after the student dropped the class.

Bookstore links

You can set up links in Self-Service that allow students to access online bookstores and review required course materials when selecting classes for registration. The Higher Education Opportunity Act (HEOA) may require that at least one bookstore link be configured at your institution as a hyperlink to an online book site. Sites can include your institution's internal campus bookstore and/or external online book sellers.

The bookstore links are configured in the `StudentRegistrationSsb_configuration.groovy` file and are available at the *section* level for a course. You can also set up the Bookstore Links option to access a secondary custom page at your institution that displays the bookstore links.

A student can do the following to access the bookstore links.

1. Click on the course title and access the Class Details window.
2. Select the Bookstore Links option.
3. View the institution's bookstore links and select one to access a bookstore.

The options in the Class Details window are configured on the Overall Page and Field Configuration Page (SOAWSCR). The fields displayed on SOAWSCR can be used as valid substitution parameters in the bookstore URL links.

You can link to bookstore sites in several ways:

- link to a website with no parameters
- link to a website using hardcoded parameters
- link to a website with dynamic parameters defined on SOAWSCR for section search results
- link to a website specific to the campus code (STVCAMP) associated with the class section

Enter the following parameters to set up a bookstore link.

Parameter	Required or Optional	Instructions
URL	Required	Enter a valid URL for the link to the bookstore.
Label	Required	Enter the <code>message.properties</code> code to be displayed as the hyperlink label. You will need to add the code and the label text to the <code>messages.properties</code> file. The <code>bookstore.links.follett</code> sample is delivered and can be used as a guide.

Parameter	Required or Optional	Instructions
Campus	Optional	Enter specific links based on the campus code. For example, if you have multiple campuses and you wish to use a different Follett bookstore number for each campus, you would include a URL configuration for each campus and include the campus code in the URL parameters.
Page	Required, if the Params item is used	Enter the Overall Page and Field Configuration Page number, if the URL is specific to the search results where 30 is equal to <code>Section</code> .
Params	Optional	Review the options for parameter substitutions in the URL. See the information below.

Three options are available when substituting parameters in the URL.

- Access the Overall Page and Field Configuration Page (SOAWSCR) and select a value for substitution.

`INSTRUCTOR` and `MEETINGTIME` are not valid options.

- Identify the element directly from the section object in the code, if it is not on SOAWSCR.

For example: `.termDesc` will retrieve the `section.termDesc` in the parameter. Additional examples include: `.partOfTerm`, `.subject`, `.campus`, `.campusDescription`, and `.college`.

- Student name may be passed to the bookstore link by supplying `NAME` in the parameter list.

The name will be formatted as identified in the General Person plugin `messages.properties` file for `default.name.format` which is used throughout the Banner 9.x administrative and Self-Service applications.

If you are using variables, use "`{0}`", "`{1}`", and so on, as place holders for the parameters appearing in the same order in the params array.

Examples of link configurations

Here are some examples of possible configurations for bookstore links.



Warning! *These examples should not be followed as written. Please consult with the third party vendors to identify the current webapp service URL and required parameters.*

Display bookstore link based on campus code

The Borders bookstore link will only be displayed if the course section is associated with a campus code that is equal to 1.

```
bookstore = [
  [
    url:"http://www.borders.com",
    label:"bookstore.links.borders",
    campus:"1"],
  ]
]
```

Display bookstore link for all sections

The Barnes and Noble bookstore link will be displayed with all sections.

```
bookstore = [
  [
    url:"https://www.barnesandnoble.com",
    label:"bookstore.links.barnesAndNoble"],
  ]
]
```

Display bookstore link based on campus ID and parameters

The Follet book site will require substitution of <Campus Store ID> with the actual campus ID, as well as parameters which will be substituted at run time.

```
bookstore = [
url:"http://www.bkstr.com/webapp/wcs/stores/servlet/
booklookServlet?bookstore_id-1=<Campus Store ID >&term_id-1={0}&dept-
1={1}&course-1={2}&sect--1={3}",
label: "bookstore.links.follett",
page: "30",
params: ["TERM", ".department", "COURSENUMBER", "COURSEREFERENCENUMBER"]
]
```

Configuration on SOAWSCR

The following data is delivered for use with the bookstore setup.



Note: When the user selects Browse Classes and accesses the bookstore information before logging in, the 01 Anonymous persona is used instead of the 02 Student persona.

Field	Value
Persona	02 Student
Page	100 Class Details Popup
Effective Term	000000
Display Number	2
Field and description	SCHEDULEBOOKSTORELINKS Bookstore Links

Field	Value
Displayed	Yes, checked
Display Text	Bookstore Links
Required	No, unchecked
System Required	Yes, checked

Email and print schedule

You can set up links in Self-Service to email a schedule and print a schedule. Email can be sent from the Schedule and Options, Look Up a Schedule, and Schedule by Centric Period pages. Schedules can be printed from the Schedule and Options and Look Up a Schedule pages. You can enable either emailing or printing, or both items.

Configuration is done in the `StudentRegistrationSsb_configuration.groovy` file and should be performed by someone familiar with your mail host. The mail host must be your SMTP server. The `your.smtp.address` would be your institution's email address, such as `mail.school.edu` or a valid IP address to the mail server. The default for the from address will be that email address. When sent to students, it is displayed in the "From" field of the email. This email address must also be a valid email address within your DNS/email server, and preferably is for an email account that is not actively monitored.

Here is some sample code.

```
grails {
  mail {
    host = "mailhost.sct.com"
  }
}
grails.mail.default.from="firstname.lastname@ellucian.com"
```

```
allowPrint = true
```

Using Personas

Personas are used within Registration Self-Service processing to determine display configuration and page access. Detail available on the Self-Service pages is determined based on the display configurations set up by persona.

A person can have a single persona or multiple personas. Personas can be used for students, advisors, faculty members, and administrators, such as registrars. Anonymous users can also have a persona. Personas are extensions of and are mapped to Banner

Web Tailor roles and include more specific data than Web Tailor. For example, the FACULTY role in Web Tailor has been separated into distinct persona types for FACULTY, ADVISOR, and both FACULTY AND ADVISOR for use with Banner 9.x.

The REGISTRAR role is manually assigned in Web Tailor. The persona using this role must have a login to Self-Service. Registrars can access pages that are similar to the pages accessed by students and faculty members, but these pages contain additional functionality. This persona can select any term and student for processing.

The Overall Page and Field Configuration Page (SOAWSCR) is used to configure page information display, display order, and field labels on Registration Self-Service pages. Personas-based page access is also configured on SOAWSCR. The configuration is based on the persona, page, and term combination in the Key block. You can copy data from one term to another and from one persona to another on this page.

Use the Persona Validation Page (STVPERS) to create and maintain codes for personas used with Banner Student Self-Service Registration. Personas control what pages can be accessed in Self-Service by a user and what tasks can be performed. Values can be system required.

Use the Persona Rules Page (SOAPERS) to set up rules used with persona entities. Each rule is associated with a Web Tailor role and the appropriate persona type, such as administrative, faculty, student, or proxy. Personas rules control what pages can be accessed in Self-Service by a user and what tasks can be performed. SOAPERS can be found on the Overall Configuration Menu (*SRCHCONF), accessed from the Registration Menu (*Registration).

The following seed data is used with STVPERS.

Code	Description	System Required
FACULTYADVISOR	Advisor	Yes
FACULTYBOTH	Faculty and Advisor	Yes
FACULTYINSTRUCTOR	Faculty	Yes
PROXY	Proxy	Yes
REGISTRAR	Registrar	Yes
STUDENT	Student	Yes
WEBUSER	Anonymous	Yes

The following seed data is used with SOAPERS.

Code	Description	Web Tailor Role	System Required
FACULTYADVISOR	Advisor	FACULTY	Yes
FACULTYBOTH	Faculty and Advisor	FACULTY	Yes

Code	Description	Web Tailor Role	System Required
FACULTYINSTRUCTOR	Faculty	FACULTY	Yes
PROXY	Proxy	PROXYACCESS	Yes
REGISTRAR	Registrar	REGISTRAR	Yes
STUDENT	Student	STUDENT	Yes
WEBUSER	Anonymous	WEBUSER	Yes



Note: The default settings for the Faculty Card and Update Student Term Data pages are not yet included in the SOAWSCR seed data for the REGISTRAR persona.

Use the **Copy Persona** button on SOAWSCR to copy settings from the STUDENT or FACULTY persona types to the REGISTRAR persona. The configurations for the STUDENT persona will be used if neither of these pages has configuration rules for the FACULTY and ADMINISTRATIVE persona types.

When you log in to Banner Student Self-Service Registration, and your login user ID has access to multiple personas, you are taken to the Persona Selection page. The roles available for your persona are displayed. Persona choices include: Student, Registrar, Faculty, Advisor, and Faculty and Advisor. You can choose one, click **OK**, and continue to the Registration Landing page. If your login user ID has only one persona, you are not given this choice, and the persona functionality becomes transparent. This situation will apply to most students and faculty members, as they are only set up as a STUDENT persona or a FACULTY persona.

You can switch your persona at any time during your session using the breadcrumbs or **Back** button to return to the Registration Landing page. The selected persona is displayed at the top of the page, to the left of the username. If you have multiple personas, and the persona in use does not have access to a specific page, you are prompted to change your role to continue. If you return to the Registration Landing page and you have multiple personas, the displayed persona becomes a link. Select the link to access the Persona Selection page and change your persona.

Persona types

The following persona types are used with registration processing.

- ANONYMOUS (WEBUSER)
- STUDENT
- FACULTY
- ADVISOR

- FACULTY AND ADVISOR
- REGISTRAR

Web Tailor role mapping

Here is a summary of the personas used with Registration Self-Service, the mapped Web Tailor roles, and information on settings, defaults, and access.

Persona	Web Tailor Role	Additional Information
ANONYMOUS	WEBUSER	<p>No login is required.</p> <p>The user can access the Browse Classes and Browse Course Catalog paths.</p> <p>Only one anonymous persona type should exist.</p> <p>The Access Code field on SOAPERS is set to <i>Anonymous</i> for the rule.</p> <p>The user can select any term where the Activate on Web indicator is checked on SOATERM.</p>
STUDENT	STUDENT	<p>A login is required.</p> <p>This is the default persona assignment when the person has been admitted and has a student record.</p> <p>A user with this persona can access pages associated with this Web Tailor role.</p>
REGISTRAR	REGISTRAR	<p>A login is required.</p> <p>This persona requires that the security administrator assign the end user to the Web Tailor role on the Web Tailor Administrator Role Assignment page.</p> <p>The user must have valid pin on the GOATPAD page for login.</p> <p>The user can select any term where the Activate on Web indicator is checked on SOATERM.</p>

Persona	Web Tailor Role	Additional Information
FACULTY	FACULTY	<p>A login is required.</p> <p>This is the default persona assignment when the person is defined as a faculty member, is active, and is assigned to a faculty appointment type on SIAINST.</p> <p>The Schedule indicator must be checked for the person to be a faculty member.</p> <p>This is an eligible persona if the appointment is active for a term range in which there is a current access date rule. If no access date rules exist, all terms are accessible.</p> <p>The persona is assigned based on the current date and the date ranges entered in the Faculty and Advisors Access Dates section of SOATERM for term display and menu access, and the Menu indicator is checked.</p> <p>A user with this persona can access pages based on the faculty security process rules on SOAFACS. Access can depend on your institution's student PIN entry requirements.</p>
ADVISOR	FACULTY	<p>A login is required.</p> <p>This is the default persona assignment when the person is defined as a faculty member, is active, and is assigned to an advisor appointment type on SIAINST.</p> <p>The Schedule indicator must be checked for the person to be a faculty member.</p> <p>Advisors share the same access eligibility as faculty members, based on the current date and the dates entered in the Faculty and Advisors Access Dates section of SOATERM for term display and menu access, and the Menu indicator is checked.</p> <p>A user with this persona can access pages based on the faculty security process rules on SOAFACS. Access can depend on your institution's student PIN entry requirements.</p>
FACULTY AND ADVISOR	FACULTY	<p>A login is required.</p> <p>This is the default persona assignment when the person is defined as a faculty member, is active, and is assigned to a faculty appointment type and an advisor appointment type on SIAINST.</p> <p>The persona is assigned based on the current date and the date ranges entered in the Faculty and Advisors Access Dates section of SOATERM for term display and menu access, and the Menu indicator is checked.</p> <p>A user with this persona can access pages based on the faculty security process rules on SOAFACS. Access can depend on your institution's student PIN entry requirements.</p>

Determine persona assignments

In preparation for using personas, consider the following.

1. Review all available Web Tailor roles to which the person is assigned.
2. Review all default roles for the person.
3. Compare the roles to the page permissions.
4. Select the persona the person may need for page access.
 - 4.1. When a person only has one persona, that persona is used for all needed access.
 - 4.2. Verify the persona for specific access, such as faculty members who can be separated into advisors and non-advisors.

Persona flow

Here is a sample of how a user would access and move through Self-Service when personas are in use.

1. The user accesses the Registration Self-Service application and sees the Registration Landing page.
2. The user selects a link that requires a log in, and the user logs in to the application.
3. When multiple personas exist, the user sees the Persona Selection page and is prompted to select a persona from a list. The selection determines the paths that are available.

A user with a single persona, such as a student, does not see this list, as the role is defaulted.

4. The user opens a specific page from a link on the Registration Landing page, and the selected persona is validated and defaulted to the page.
 - If the user tries to access a page to which the persona does not have access, whether the role has been defaulted or selected, an error is displayed.
 - If only one role exists, access to the page is denied.
 - If multiple roles exist, the user is prompted to select another role to access the page.
5. The Select a Term page is displayed, and the terms available are dependent on the user's persona.
6. The persona in use is displayed at the top of the page, to the left of the user name.
7. The pages carry that persona forward until the user changes to a different persona.
8. The persona can be changed on the Registration Landing page by clicking on the displayed persona and selecting a different persona from the list on the Persona Selection page.
9. The user can continue with registration processing using the newly selected persona.

Persona security

The persona type code includes the rule that controls the type of security that is used. For example:

- **STUDENT** - Students can only access their own records.
- **REGISTRAR** - Administrators can access any student and term.
- **FACULTY, ADVISOR, and FACULTY AND ADVISOR** - Faculty members and advisors must enter a student's password and can be limited to students with which they are associated.

Faculty security

Faculty security is executed for the **FACULTY, ADVISOR, and FACULTY AND ADVISOR** persona type codes. This is necessary for registration processing, as a faculty member or advisor has the ability to enter the term, the student, and the student's password. When using registration planning, the faculty process rules defined on the Faculty/Advisor Process Rules Page (SOAFACS) for the **PLANAHEAD** process are followed.

See the "Faculty Security - Plan Ahead Path" topic in the "Registration Planning" chapter for information on seed data used with the Process Control Code Validation Page (STVPROC) and the Faculty/Advisor Process Rules Page (SOAFACS) for the **PLANAHEAD** process.

Registration Landing page configuration

Here are the configurations by persona for links displayed on the Registration Landing page in Self-Service. The configurations are defined on **SOAWSCR**.

ANONYMOUS

The following links are displayed for the **ANONYMOUS** persona type.

- Prepare for Registration
- Register for Classes
- Browse Classes
- Browse Course Catalog
- Plan Ahead
- View Registration Information

STUDENT

The following links are displayed for the STUDENT persona type.

- Prepare for Registration
- Register for Classes
- Browse Classes
- Browse Course Catalog
- Plan Ahead
- View Registration Information

FACULTY, ADVISOR, FACULTY AND ADVISOR

The following links are displayed for the FACULTY AND ADVISOR persona type.

- Register for Classes
- Plan Ahead
- Browse Classes
- Browse Course Catalog

REGISTRAR

The following links are displayed for the REGISTRAR persona type.

- Register for Classes
- Browse Classes
- Browse Course Catalog
- Prepare for Registration
- Plan Ahead
- View Registration Information

Persona access

Here is a summary of current persona access.

Self-Service path	STUDENT	REGISTRAR	FACULTY, ADVISOR, FACULTY AND ADVISOR
Register for Classes	Yes	Yes	Yes, requires student PIN
Prepare for Registration	Yes	Yes	No
Plan Ahead	Yes	No	Yes, when faculty security process PLANAHEAD is in use
View Registration Information	Yes	No	No
Class Search	Yes	Yes	Yes
Course Search	Yes	Yes	Yes

Name and ID search

Users who are administrators and faculty members or advisors can search on student names or Banner IDs for a term on the Select a Term page in Self-Service. This allows the user to perform a quick search on a student for a term without leaving the page and then continue with registration. The search criteria displayed changes depending on the user's persona type code, such as REGISTRAR, FACULTY, ADVISOR, or FACULTY AND ADVISOR.

The registrar or administrator can enter a partial ID and view a list of results. The registrar can then change the term for the student, change the study path for the student, or change both and proceed with registration. The user who is either a faculty member, an advisor, or both, can also enter a partial ID and view a list of results.

The faculty member or advisor may be limited to searching for their assigned students or advisees. The ALLADV, ALLFAC, and REGADVISEE GTVSDAX rules for the FACWEB internal code group control whether the faculty member or advisor can search beyond their classes or advisees. The faculty member or advisor must enter the student's password to access the Self-Service registration pages.

Holds notifications

Holds processing messages are used in the Prepare for Registration path and the Register for Classes path. In addition to the general message that *Holds Exist*, the details of each hold are presented and are based on holds for the student found on the Hold Information Page (SOAHOLD).

Holds are divided into two categories, holds that prevent registration and holds that do not prevent registration. Holds can also be considered as "sensitive" and are not for shared viewing.

- For the *registrar* only, when a hold type has the **Web Indicator** check box unchecked (set to \mathbb{N}) on the Hold Type Code Validation Page (STVHLDD), hold details are displayed to the registrar, and the hold is designated as a "sensitive hold". The message *Sensitive registration holds exist. Do not display this sensitive hold information to others* is presented.
- For the *student* only, when a hold type has the **Web Indicator** check box unchecked (set to \mathbb{N}) on the Hold Type Code Validation Page (STVHLDD), hold details are not displayed to the student. The message *Please note that some holds are sensitive and may not display on this page* is presented. This indicates that additional holds exist.

Prepare for Registration path

In the Prepare for Registration path, hold messages are displayed to students and registrars when the term is entered on the Select a Term page. Hold details are also displayed.

Register for Classes path

In the Register for Classes path, hold messages that prevent registration are displayed to students, faculty members, advisors, and registrars when the term is entered on the Select a Term page. Holds details are also displayed. Hold messages and details are displayed in the Notification Center. Holds that do not prevent registration are not displayed.

For holds that prevent registration and can be overridden, a registrar can use the **Holds Password** field on the Select a Term page. The message *You must enter the holds password to proceed* is displayed in the Notification Center for the specific hold.

Holds rules and settings

The display of notification messages is controlled by settings in administrative Banner. For users who log in as faculty members or advisors and have those personas, the display of holds is based on the `DISPLAYHOLDS` (Display Student Holds) process rules on the Faculty/Advisor Process Rules Page (SOAFACS).

- When the rules on SOAFACS have not been met, the message *You have holds which prevent registration* is displayed.
- When the rules on SOAFACS have been met, specific messages with hold details are displayed.

Only holds which prevent a student from registering are considered for notification purposes in the Register for Classes path. The settings on the Hold Type Code Validation Page (STVHLDD) for the **Registration** check box and the **Web Indicator** check box determine the notification for a hold type code.

- When the **Web Indicator** is checked (set to \mathbb{Y}) and the **Registration** check box is not checked (set to \mathbb{N}), the generic hold message *You have holds which prevent registration*

is displayed. This indicates to the faculty member or advisor that additional holds exist for the student. Hold details can be viewed for the student on the Hold Information Page (SOAHOLD).

- When the **Web Indicator** is not checked (set to N), the message *Please note that some holds are sensitive and may not display on this page* is displayed for the faculty member or advisor. Hold details can be viewed for the student on the Hold Information Page (SOAHOLD).
- When the **Web Indicator** is not checked (set to N) but the **Registration** indicator is checked (set to Y), a message is presented that holds exist which cannot be displayed.
- When the **Web Indicator** is checked (set to Y) and the **Registration** indicator is checked (set to Y), the holds are displayed.



Note: The **Web Indicator** applies only to the student persona. It does not apply to registrars or administrators.

When process rules for DISPLAYHOLDS are in use on SOAFACS for users who log in as faculty members or advisors and have those personas, notification processing considers additional attributes for holds messaging.

- When SOAFACS rules are met, holds are displayed in the Notification Center with details. When sensitive holds exist for the student, that message is also displayed.
- When SOAFACS rules are not met, the generic holds message is displayed.

Registration with holds checking is also dependent on the Section Options setting for **Holds** on the Term Control Page (SOATERM).

- When the **Holds** option is set to Fatal, registration cannot proceed.

Hold can be overridden by the registrar using the **Holds Password** field on the Select a Term page. The holds password is defined on SOATERM. Processing behavior for the holds password is the same as on the Student Course Registration Page (SFAREGS).

- When the **Holds** option is set to Warning or No Check, the following occurs:
 - Users who log in as faculty members or advisors and have those personas can continue with registration for the student.
 - Users who log in as students and have the student persona can continue with registration.

SOAFACS rules

The settings on SOAFACS for the DISPLAYHOLDS rules are considered for the display of holds messages.

Indicator	Processing Details
Process Available on Self-Service	This indicator must be checked for the process rule to be used in Self-Service.
PIN Control	The setting of this indicator does not apply (whether checked or unchecked), as the faculty member or advisor must always enter the student's password for registration when in the Register for Classes path.
All Access	When this indicator is checked, no security is invoked. The faculty member or advisor can view hold details for a student that prevent registration.
Relationship	<p>When this indicator is checked, the following must be true for the faculty member or advisor to view hold details for the student that prevent registration.</p> <ul style="list-style-type: none"> • The faculty member must have a teaching relationship with the student, that is he/she is the instructor for a section (CRN) in which the student is enrolled. <p>The instructor does not have to be the primary instructor.</p> <p>This information can be viewed in the Instructor information on the Schedule Page (SSASECT).</p> <ul style="list-style-type: none"> • The advisor must have an advising relationship with the student, that is he/she is affiliated with the student on the Multiple Advisors Page (SGAADVR). <p>The advisor does not have to be the primary advisor.</p> <p>This information can be viewed in the Advisor Information section on SGAADVR.</p>
Primary	<p>When this indicator is checked, the faculty member must be the primary instructor, and the advisor must be the primary advisor, in order to view hold details for the student that prevent registration.</p> <ul style="list-style-type: none"> • The faculty member must have the Primary Indicator checked on the Schedule Page (SSASECT). • The advisor must have the Primary Indicator checked on the Multiple Advisors Page (SGAADVR).

Indicator

Processing Details

Attribute Type Checking

When this indicator is checked, the process checks the faculty attribute or the advisor type to verify that the hold details can be viewed.

- The faculty attribute is set up on the Faculty/Advisor Information Page (SIAINST), in the Faculty Attributes information, for a code of `FACL - Faculty Web`.

On the Faculty Attribute/Advisor Type Control Page (SOAFAPC) in the Access Role Processing section, the system checks the faculty attribute on SIAINST and cross-references it to SOAFAPC.

This allows the faculty member to view the hold details for the student.

- The advisor type is set up on the Multiple Advisors Page (SGAADVR) for a code of `MAJR - Major`.

On the Faculty Attribute/Advisor Type Control Page (SOAFAPC) in the Access Role Processing section, the system checks the advisor type on SGAADVR and cross-references it to SOAFAPC.

This allows the advisor to view the hold details for the student.

Copy button

The **Copy** button, used to copy data from an existing term to a new term, can be found in the Key block of various administrative registration pages. The **Copy** button state (enabled or disabled) is set as follows:

- The **Copy** button is disabled if records exist for the term entered in the **Term** field.
- The **Copy** button is enabled if records do not exist for the term entered in the **Term** field.
- The **Copy** button state is not set until you leave the **Term** field.
- If the prior term value has no existing records, the **Copy** button is enabled based on that value. When you enter a new term in the **Term** field for which there is an existing record, the **Copy** button is not disabled until you tab or click outside of the **Term** field.
- If the prior term value has existing records, the **Copy** button is disabled based on that value. When you enter a new term in the **Term** field for which there is no existing record, the **Copy** button is not enabled until you tab or click outside the **Term** field.

Block Registration

This chapter details the set up and processing for block registration.

Overview

Block registration allows you to facilitate registration by creating blocks of courses that can be made available to the student during Self-Service Registration. There are three primary ways that the student can have access to blocks during registration. Blocks can be:

- pre-assigned to individual students manually
- pre-assigned to students using a batch process
- made available to the student at registration based on pre-defined rules

Students can be required to enroll in a pre-assigned block or be given the option to select an alternate block. Students can also select blocks on their own during registration. When multiple rules apply to a student, the rule with the highest priority is used.

You can set up block assignment rules with characteristics that a student must meet in order for a specific rule to apply. Blocks are then assigned to the rule. Additional rules can be set during batch pre-assignment for pre-assignment limit checking in a block, and permit-override codes for registration can be automatically generated. You can also define whether students can add or drop courses by block only or by non-block only, or if all courses can be changed.

This functionality is used within the Class Search and Registration page in Banner Student Self-Service. The Blocks tab is used to access the block registration information. Students can then proceed with registration.



Warning! *The block schedule functionality used in Banner 8.x has not been modified. You cannot mix the 8.x block schedule functionality with the 9.x block registration functionality. You must use one or the other. The two types of functionality will be modified to be compatible in a future release.*

Processing

This section discusses setting up and using block registration.

The following Banner Student 9.x administrative pages are used with block registration.

- Block Registration Control Page (SFABLCK)

- Block Rule Definition Page (SFABRDF)
- Pre-Assigned Block Configuration Page (SFAPABC)
- Student Block Pre-Assignment Page (SFABLPA)
- Student Block Selection Inquiry Page (SFIBSEL)

The pages are listed on the Block Registration Menu (*BLOCKREG) which can be found on the Registration Menu (*REGISTRATION).

The following tables are used specifically with Banner Student 9.x block registration.

- Block Capacity Definition Table (SFBBLCD)
- Block Registration Control Optional Indicator Table (SFRBKOP)
- Block Student Pre-Assignment Table (SFRBLPA)
- Block Rules Detail Table (SFRBRDB)
- Block Rules Table (SFRBRDH)
- Student Course Block Registration Table (SFRBSEL)
- Block Term Configuration Table (SFRPABC)

The following Banner 8.x report and process are used with this block registration.

- Student Pre-Assignment Process (SFPSBPA)
- Incomplete Registration Report (SFRIBLR)

A Blocks tab is available on the Class Search and Registration page Banner Student Self-Service.

Set up and use block registration

Do the following to set up and use block registration.

1. Build block codes in Banner Student 8.x on the Block Code Validation Page (STVBLOCK).
2. Define blocks of CRNs for a term in Banner Student 9.x on the Block Registration Control Page (SFABLOCK).



Note: SFABLOCK is used in place of the Block Schedule Control Page (SSABLOCK), as it allows for a pre-assignment limit control. This control is used by the SFPSBPA process.

- 2.1. Enter the pre-assignment limit control for the block.
- 2.2. Indicate whether enrollment in the course is optional.
- 2.3. Review section detail for each course, including if special approval is needed to register for the course.

3. Define rules in Banner Student 9.x on the Block Rule Definition Page (SFABRDF).
 - 3.1. Define the term for which the rule applies.
 - 3.2. Define the priority for the rule.
 - 3.3. Specify the characteristics which the student must have in order for the rule to apply.
 - 3.4. Indicate whether the block selection is required.
 - 3.5. Indicate whether the student should be allowed to change to a different block once a block has been selected.
 - 3.6. Indicate whether the rule is active.
 - 3.7. For block settings, indicate whether the block can be pre-assigned in batch using the Student Pre-Assignment Process (SFPSBPA).
 - 3.8. For block settings, select the add and drop restriction.
4. Set up block and course restrictions by term in Banner Student 9.x on the Pre-Assigned Block Configuration Page (SFAPABC).
 - 4.1. Indicate whether block registration is available in Self-Service for a given term.
 - 4.2. Indicate whether the student can make changes to the block.
 - 4.3. Indicate whether an override should be created when a student selects a pre-assigned block.
 - 4.4. Enter the permit/override code to be created when the student registers for a pre-assigned block.
 - 4.5. Set the course restrictions for adding and dropping to block course only, non-block courses only, or any courses.
5. Run the Student Block Pre-Assignment Process (SFPSBPA) from Banner 8.x job submission to pre-assign blocks to a student or to a population selection.
6. Pre-reassign a block to a student by ID, term, and study path in Banner Student 9.x using the Student Block Pre-Assignment Page (SFABLPA).
 - 6.1. Create a manual pre-assignment.
 - 6.2. Review if the block was assigned manually or in batch by SFPSBPA.
 - 6.3. Enter a permit-override code if needed.
 - 6.4. Review the rule details, including whether the rule is active and whether block selection is required for registration.
7. Query information for blocks in which the student has chosen to register in Banner Student 9.x on the Student Block Selection Inquiry Page (SFIBSEL).
 - 7.1. Define the query for an ID, term, and study path.
 - 7.2. Review the block detail, including whether the block was manually assigned, special approval, and permit-override information.
 - 7.3. Review the rule detail, including whether the rule is active and whether block selection is required for registration.

8. Run the Incomplete Registration Report (SFRIBLR) from Banner 8.x job submission to retrieve students who have not successfully registered for all the courses in a block. You can use a population selection.

Pre-assignment limit control

Defining the block on SFABLCK includes setting the block pre-assignment limit. This is used by the Student Pre-Assignment Process (SFPSBPA) to restrict how many students can be pre-assigned to a specific block. When the Verify Capacity parameter is set to Y , once the number of assignments has reached the pre-assignment limit, no additional students will be assigned to the block.

Automated permit-override creation

When pre-assignment limit checking, student attributes, special approval, or other restrictions are used to limit registration to sections within blocks during pre-assignment, you can then assign a permit-override code to the block as part of pre-assignment. During registration, when the student selects the pre-assigned block, a permit-override for each CRN associated with the block will be created and will allow for an override.

Permit-override rules are defined on the Registration Permit-Overrides Control Page (SFAROVR). Permit-override codes can be entered on the Pre-Assigned Block Configuration Page (SFAPABC) when the **Create Override** indicator is checked. When the Generate Ovr Permission parameter is set to Y in the Student Pre-Assignment Process (SFPSBPA), that code will be attached to the student's pre-assignment record.

Student characteristics

Block registration rules apply to students based on the primary curriculum or the study path when it is active. You can use characteristics to apply a more specific rule to a group of students. Use the Block Rule Definition Page (SFABRDF) to add student attributes to a rule. You can assign a high priority to the rule to ensure it is used during registration. You can assign a low priority, not assign a block to the rule, and make the rule inactive, so it applies to the student but does not show any associated blocks. This allows the student to register for courses without having to select a block.

Pre-assign blocks to student

The Student Pre-Assignment Process (SFPSBPA) is used to pre-assign blocks to students based on the rules created on the Block Rules Definition Page (SFABRDF). The pre-assignment process is run for a term for a specific ID, a population selection of students, or for all students. The process uses the primary curriculum record and any active study paths.

Blocks are assigned based on the setting of the **Assign Block to Student** indicator on SFABRDF. When multiple blocks exist, students are distributed alternately by SFPSBPA

among the blocks for the rule until the block pre-assignment limit defined on SFABLCK is reached. Pre-assigned block results can be viewed on the Student Block Pre-Assignment Page (SFABLPA).

Review incomplete registration

The Incomplete Registration Report (SFRIBLR) is used to retrieve students that are not registered in all the courses of a selected block for registration. Reporting is performed for the catalog or schedule level.

- For the catalog level, the student is considered to be incomplete when not registered in all the distinct courses (subject code plus course number) for the CRNs in the block.
- For the schedule level, the student is considered to be incomplete when not registered in all the CRNs (course sections) in the block.

The report is run for a term for a specific ID, a population selection of students, or for all students. You can choose to generate detailed or summary output. The summary output shows the primary curriculum, number of missing courses, and total credits for registration. The detailed output shows the same information plus the missing courses by subject and course combination or by CRN.

Administrative pages

The following administrative pages are used with this functionality. Please refer to the *Banner Student 9.x Online Help* for descriptions of page sections and field definitions.

Block Registration Control Page (SFABLCK)

The Block Registration Control Page (SFABLCK) is used to define blocks of courses by term for block registration in Banner Student Self-Service. Open learning CRNs can be used in blocks. The block pre-assignment limit is required. Once the pre-assignment limit has been reached for a block when the Student Pre-Assignment Process (SFPSBPA) is run, no more assignments can be made.

Enrollment status and time conflict messages are displayed by CRN. CRNs in a block are considered to be mandatory for registration unless the student has add and drop permission or the **Enrollment Optional** indicator is checked for the course within the block.

Credit and billing hours can be assigned to the CRN if they are specified as variable hours. For example, if a CRN has three to five credit hours, you can change the value to be specifically four credit hours for use in the block of courses. The grade mode can also be changed.

The detail information for each CRN is displayed for reference from the SSBSECT table.

Block Rule Definition Page (SFABRDF)

The Block Rule Definition Page (SFABRDF) is used to define rules for blocks by priority and term that can be assigned to students for registration. Blocks can be selected by the student during registration or can be pre-assigned.

When the block selection is required (**Block Selection Required** is checked) and the student meets the rule, the student must select a block that is attached to the rule during registration. The block settings also show whether the student can add or drop courses within the block or can change any courses in registration. When the **Allow Change Block** indicator is checked, changes can be made. When this indicator is not checked, no changes can be made after block selection or registration.

Block settings are displayed for each rule. The **Assign Block to Student** indicator is used by the SFPSBPA process to assign a student population to blocks until the pre-assignment limit is met. The **Add and Drop Course** radio group determines if changes can be made by the student in Self-Service for none, some, or all courses, whether block or non-block. When the enrollment requirement exists on SFABLCK, no changes can be made.

Student Block Pre-Assignment Page (SFABLPA)

The Student Block Pre-Assignment Page (SFABLPA) is used to maintain pre-assigned blocks for a student by term and study path. The pre-assigned block and associated block rule are displayed. Blocks can be assigned in batch using the Student Pre-Assignment Process (SFPSBPA). You can use a population selection or can select from the process parameters. When a block is manually assigned on this page, the **Assigned Manually** indicator is checked, and no rule is displayed. The block also shows if a permit-override exists for the block in which the student is currently registered.

Pre-Assigned Block Configuration Page (SFAPABC)

The Pre-Assigned Block Configuration Page (SFAPABC) is used to define block and course restrictions by term for pre-assigned blocks during registration. Restrictions are set up to determine whether block registration is available in Self-Service and whether block and course restrictions are in use. When the **Available On Self-Service** indicator is checked for the term, the Blocks tab is displayed in Self-Service.

For manual pre-assignments, block restrictions can be set for whether a student can change from one block to another and if registration overrides can be created. Course restrictions can be set to not allow any adds or drops, only allow adds or drops for non-block courses, or allow adds and drops for any courses.

Student Block Selection Inquiry Page (SFIBSEL)

The Student Block Selection Inquiry Page (SFIBSEL) is used to query on blocks for which students have registered in Self-Service. Queries are by ID, name, term, study path. If a study path is not active, the primary curriculum is displayed. Blocks retrieved can be

manually assigned or assigned by the Student Pre-Assignment Process (SFPSBPA). The block rule is displayed when the rules are defined on the Block Rule Definition Page (SFABRDF).

Block registration in Self-Service

The Class Search and Registration page in Banner Student Self-Service contains a section for block registration. The Blocks tab is used to access the block registration information. See the "Self-Service Registration" chapter for page and field details.

When a student is logged into Self-Service, has picked a term on the Select a Term Page, and has clicked on the **Continue** button, the Class Search and Registration Page is displayed. If a record exists on the Pre-Assigned Block Configuration Page (SFAPABC) for the term the student has selected, and the **Available on Self-Service** indicator is checked, the Blocks tab is displayed and can be accessed.

Block selection process

When the Blocks tab is available but the student is not already registered in the block, the system checks to see if the student is required to select a block for registration. If the student is required to select a block, no other functions can be performed on this page until the block is selected.

Block selection is required when:

- A manual pre-assignment record exists for a student on the Block Student Pre-Assigned Table (SFRBLPA).
- The pre-assignment is performed by the Student Pre-Assignment Process (SFPSBPA), and the associated SFRBRDH rule has the SFRBRDH_MANDATORY_IND column set to Y.

When a pre-assignment record does not exist for the student, the active rules in the SFRBRDH table are evaluated. The record with the highest priority (the lowest priority number) is used.

Permission to remove blocks

When a student is currently registered in a block (a record exists in the SFRBSEL table), and the rule associated with the block does not require a block selection, the student can remove the block if needed.

- When the block assignment record is associated with a rule (the SFRBSEL_BRDH_SEQ_NUM column is Not Null), the rule record is retrieved from the SFRBRDH table and checked to see if the student is required to select a block. When the SFRBRDH_MANDATORY_IND column is set to Y, a block selection is required, and the student cannot remove the current block.

- When the block assignment record is not associated with a rule, (the SFRBSEL_BRDH_SEQ_NUM column is Null), the student cannot remove the current block due to an existing manual pre-assignment.

Permission to change blocks

When a student has a pre-assignment record for block registration, checks are made to determine whether the student can change blocks.

- When the pre-assignment record is associated with a rule (the SFRBLPA_BRDH_SEQ_NUM column is Not Null), the associated rule record is retrieved from the SFRBRDH table and checked to see if the student can choose from multiple blocks. When the SFRBRDH_BLOCK_RESTRICTION_IND column is set to N, the student cannot change blocks.
- When the pre-assignment record is not associated with a rule (the SFRBLPA_BRDH_SEQ_NUM column is Null), the pre-assigned block configuration for the term is retrieved from the SFRPABC table and checked to see if the student can choose from multiple blocks. When the SFRPABC_BLOCK_RESTRICTION_IND column is set to N, the student cannot change blocks.
- When a student is currently registered in a block (a record exists in the SFRBSEL table), the system checks to see if a drop code exists for use based on the AUTODROP and ADMINDROP GTVSDAX rules. If no single, unique, drop code exists, the student cannot change blocks.

A student cannot change blocks when the following is true:

- The student is currently registered to a manually pre-assigned (suggested) block, and the **Student May Change Block** indicator on SFAPABC is not checked. No other blocks are displayed to the student.
- The student is currently registered in an alternative block, and the **Allow Change Block** indicator for the corresponding rule on SFABRDF is not checked.

Examples of dropped and added courses

Here are sample scenarios for dropping and adding courses for blocks and the expected results.

Example 1

The student is registered in Block A. Block A contains CRNs 1, 2, and 3.

The student drops Block A and registers in Block B. Block B contains CRNs 1, 2, and 3.

The registration records are not dropped. The block is replaced in the SFRSTCR table with Block B, and the SFRBSEL record reflects the selection of Block B.

Example 2

The student is registered in Block A. Block A contains CRNs 1, 2, and 3.

The student drops Block A. All CRNs are dropped.

The student registers in Block A again. All CRNs in the block are changed back to a status of registered.

The student drops Block A again. All CRNs are dropped.

The student registers in Block A yet again. All CRNs in the block are changed back to a status of registered.

Example 3

The student registers in CRN 4.

The student drops CRN 4 with a course registration status code of DC. The CRN is not deleted.

The student registers in Block A. Block A contains CRNs 1, 2, 3, and 4.

CRN 4 is returned to a status of registered, and the block is updated in the SFRSTCR table.

Example 4

The student registers in CRN 4.

The student drops CRN 4 with a course registration status code of DW. The CRN is deleted.

When the student accesses the Block tab, CRN 4 is no longer displayed in the Summary section.

The student registers in Block A. Block A contains CRNs 1, 2, 3, and 4.

CRN 4 is added back to the Summary with a status of registered, and the block is updated in the SFRSTCR table.

Example 5

The student registers in CRN 4.

The student registers in Block A. Block A contains CRNs 1, 2, and 3.

The student drops Block A. Only CRNs 1, 2, and 3 are dropped.

Enroll student in a new block

A student can enroll in a new block by performing the following steps.

1. Select a block using the **Select Your Block Option** radio group.
2. Click on the **Submit** button to process the block.

Processing continues.

3. The generated transactions are sent through the registration process.
 - 3.1. A student block selection record is created in the SFRBSEL table.
 - 3.2. The block code and block rule sequence number are updated in the SFRSTCR and SFRSTCA tables.
4. Error checking takes place.
 - 4.1. Courses with fatal errors are rejected and are not added to the student's schedule. They are processed as if the student entered the classes manually.
 - 4.2. Courses without fatal errors are passed and are added to the student's schedule.

Remove student from an enrolled block

A student can remove a block in which he/she is enrolled by performing the following steps.

1. Remove the block by selecting the `Drop all classes that are part of your current block` value in the **Select Your Block Option** radio group.
2. Click on the **Submit** button to process the block.

Processing continues.

3. The process retrieves the student's SFRBSEL record and determines which drop code to use from the AUTODROP and ADMINDROP GTVSDAX rules.
4. The drop code is assigned to the **Action** field for each CRN in the "work area" of the page where the block code for the CRN (SFRSTCR_BLK_CODE) is equal to the block selected by the student (SFRBSEL_BLK_CODE).
5. The generated transactions are sent through the registration process.
6. Error checking takes place.
 - 6.1. Courses with fatal errors are rejected and are not added to the student's schedule. They are processed as if the student entered the classes manually.
 - 6.2. Courses without fatal errors are passed and are added to the student's schedule.

Enroll student in a different block

A student can change a block in which he/she is enrolled by performing the following steps.

1. Select a new or different block using the **Select Your Block Option** radio group.

2. Click on the **Submit** button to process the block.

Processing continues.

3. When the selected block is pre-assigned, (the student has a record in the SFRBLPA table for the specific block), and the SFRBLPA_ROVR_CODE column is Not Null, the process creates an SFRSRPO record for each CRN in the block of courses. The permit-override code can then be used to create an override.
4. Each CRN in the block of courses is moved into the “work area” of the page in preparation for registration.
5. The **Action** field is set to the code for the GTVSDAX WEBRSTSREG rule.
6. The process retrieves the student’s SFRBSEL record and determines which drop code to use from the AUTODROP and ADMINDROP GTVSDAX rules.
7. The drop code is assigned to the **Action** field for each CRN in the “work area” where the block code for the CRN (SFRSTCR_BLK_CODE) is equal to the block selected by the student (SFRBSEL_BLK_CODE).
8. The generated transactions are sent through the registration process.
9. Error checking takes place.
 - 9.1. Courses with fatal errors are rejected and are not added to the student’s schedule. They are processed as if the student entered the classes manually.
 - 9.2. Courses without fatal errors are passed and are added to the student’s schedule.

Action field

The **Action** field in the Summary section of the page only displays the value of None. On the Find Classes and Enter CRNs pages, the value displayed in the **Action** field depends on course restrictions that are set up on SFABRDF or SFAPABC.

When the student has a block assignment record in the SFRBSEL table, the following is true:

- When the block assignment record is associated with a rule (the SFRBSEL_BRDH_SEQ_NUM column is Not Null), the value of the add and drop course restriction from the block assignment rule (the SFRBRDB_COURSE_RESTRICTON setting) is used to determine the impact on the **Action** field.
- When the block assignment record is not associated with a rule (the SFRBSEL_BRDH_SEQ_NUM column is Null), the value of the add and drop course restriction from the block assignment rule (the SFRPABC_COURSE_RESTRICTON setting) is used to determine the impact on the **Action** field.
- The course restriction in the SFRBRDB or SFRPABC tables can be set to NR (Without Restriction), NB (Non-Block Only), or NA (Not Allowed). These values are explained below.

Without restriction

Changes can be made without any restrictions, and there is no impact on the **Action** field for any of the student's CRNs. Current processing rules are used.

Non-block only

Changes can be made only to CRNs that are not associated with a block of courses.

- For any CRN that is not part of a block (the `SFRSTCR_BLK_CODE` is `Null`), the **Action** field is populated according to the current rules.
- For any CRN that belongs to the block where the **Optional** indicator for the CRN (`SFRBKOP_OPTIONAL_IND`) is set to `Y`, the **Action** field is populated according to the current rules. Otherwise, `None` is the only value displayed in the **Action** field.

Not allowed

Changes cannot be made under any circumstances.

For any CRN that belongs to the block where the **Optional** indicator for the CRN (`SFRBKOP_OPTIONAL_IND`) is set to `Y`, the **Action** field is populated according to the current rules. Otherwise, `None` is the only value displayed in the **Action** field.

Reporting

The following process and report are used with block registration.

- Student Block Pre-Assignment Process (SFPSBPA)
- Incomplete Block Registration Report (SFRIBLR)



Note: Reports and processes must be run from job submission in Banner 8.x.

See the *Banner Student Reports and Processes Handbook 8.7* for information on parameters and output samples.

Student Pre-Assignment Process (SFPSBPA)

The Student Block Pre-Assignment Process (SFPSBPA) is used to pre-assign a block to a specific student, to multiple students, or to a selected population. Population selection parameters are used to pre-assign a block to more than one student ID at a time. The process uses the primary curriculum and any active study paths. The rules defined in the Block Rules Definition Page (SFABRDF) are used to pre-assign a block to the student.

The pre-assigned block is displayed as *Suggested* in Banner Student Self-Service Registration.



Note: Before the Student Block Pre-Assignment Process (SFPSBPA) is run, the CRNs must be associated with a block on the Block Schedule Control Page (SFABLCK).

Only one block can be pre-assigned to the student at a time, using the Student Block Pre-Assignment Process (SFPSBPA). If a student is permitted to select multiple blocks in Self-Service, based on the rule defined in SFABRDF, then the system identifies the block with fewer pre-assigned students and pre-assigns it to the student. This ensures equal distribution of students to all the available blocks that are associated with the rule. Once the block has been pre-assigned to the student, the Student Block Pre-Assignment Page (SFABLPA) can be used to verify the assignment.

When two block rules apply to a student but the defined priorities are different, the rule with highest priority (lowest priority number) will be selected for pre-assigning a block to a student. When two rules match exactly and the defined priorities are the same, the first one found is selected for pre-assigning a block to a student.

The SFPSBPA process does not require that any permit/override options be checked on the Registration Permit-Overrides Control Page (SFAROVR). The process will display a message in the `.log` file when the override code defined on the Pre-Assigned Block Configuration Page (SFAPABC) is not defined on SFAROVR or does not have any options checked. The override code on SFAPABC is ignored by the process in this case.

When a term is selected for registration, SFPSBPA uses the specific term associated with the rule on SFABRDF instead of using an effective term. The process must use a term that is exact to the rule, not a term that falls within a range or comes after a particular term. For example, for term 201610, a rule must exist on SFABRDF for that term. The rule cannot be for a term within a range of 201510 to 201710. The rule cannot be for a term that comes after term 201510.

Incomplete Registration Report (SFRIBLR)

The Incomplete Block Registration Report (SFRIBLR) is used to retrieve details of students who have not been successfully registered for all the CRNs in a registration block. Reporting is performed for the catalog or schedule level. The report output is grouped by the student's college, level, major, program, and ID. Student type and student class are also reported.

A report can be produced for a specific student ID or for a population selection. If a population or single ID is not specified, the report is processed for all the students.



Note: When the Report Level parameter is set to C (Catalog), processing does not validate the schedule type for the CRNs/sections.

For example, if you have CHEM 101 Lecture and CHEM 101 Lab, and only the lecture has been selected for registration, the Catalog report level does not recognize that the lab is missing. The Schedule report level does return the CHEM 101 Lab as missing.

Registration Planning

This chapter details the setup and processing for registration planning.

Overview

Registration planning allows a student, faculty member, or advisor to build a plan summary that includes courses, class sections, and/or degree audit data. The student registration plan is used to assist with future registration for classes. Multiple registration plans can be built by a student, faculty member, or advisor within or between terms. Registration plans are typically built by students in advance of the opening of registration at the institution. Registration plans follow two paths in Banner Student Self-Service. Plans are created in the Plan Ahead path, and students can register from those plans in the Register for Classes path.

Plan Ahead path

Students can create or edit their registration plans in Banner Student Self-Service. Select the Plan Ahead option on the Registration Landing page to begin registration planning. You are prompted to select a term. You are then taken to the Select a Plan page where you can create a new plan or select an existing plan to edit or delete. When creating a new plan or editing an existing plan, you can search on courses using basic or advanced searches. If a faculty member or advisor has created a plan for the student, those plans are displayed in the Select a Plan and Plan Ahead tabs.

When you select a course from the search results, you can add it to the plan at the course level, or you can view sections associated with the course and add the CRN to the plan. You can have a mix of courses and sections in the plan. No restriction checking takes place when classes are added to the plan summary. Restriction checking will occur in the Register for Classes path when classes are added to the registration summary from a plan.

Sections and courses added to the plan are displayed in the Summary section of the page. You can also view the schedule or schedule details for the plan as you build it. Once all courses and/or sections have been added to the plan summary, the **Save Plan** button can be selected. At this time, the plan name is entered. Once the plan has been saved, you can continue to edit the plan, or you can return to the Select a Plan page to view the plans for the student.

Notes can be applied to a plan or to specific courses or classes. Notes are editable only by the plan creator. Otherwise, notes can be viewed by any user who can view those plans.

When registration and registration planning are open for the same term, and the student has registered for classes in the same term, the registered classes are displayed in the Plan Ahead path in the plan summary as *Information Only* with a status of *Registered*.

No option is available in the **Action** field. This allows the student to reference classes for which he/she is already registered and view those sections in the Schedule and Schedule Details section of the page. Registered classes are always displayed in the plan summary in the Plan Ahead path but are not saved as part of the student registration plan.

In the Plan Ahead path, when a student selects a term where the indicator used to look for third party degree audit system plans is checked on SOATERM and Self-Service planning has been set up on SOATERM and SOAREST, Student Educational Plans (SEPs) from Degree Works or other third party degree audit systems can be pushed into Banner in real time. These SEPs can be used to add courses or classes to the registration plan summary and are displayed in the Plans tab with any other student registration plans.

In order for a student to access the Plan Ahead path, the student ID only needs to have an associated general student record (SGBSTDN) and/or student role with a valid login ID and password. Access to this path and to the planning term is not controlled by the effective term range on the general student record. When the student logs in and the needed term is available in the term list (term is open for planning on SOATERM), the student can create plans against that term code, regardless of the effective term on the general student record.

Register for Classes path

Once a plan has been created by the student, faculty member, or advisor, it can be used to register for classes. You can select the Register for Classes option on the Registration Landing page, and then enter a term or date range in the Select a Term page. The Plans tab is displayed on the Class Search and Registration page in Banner Student Self-Service. When you select this tab, you can view the courses and sections in the plan, as well as all of the student's registration plan information.



Note: Students can register for classes directly from any of their registration plans, as well as from the Class Search Results or other options, such as adding CRNs directly or using block registration.

After courses have been added to the plan, you need to select associated sections and add them to the registration summary. Use the **View Sections** button to display the sections for the course. Selected sections added to registration from the plan are displayed in the registration summary with a `Pending` status and an action of `Registration`. (Sections can also be added directly to the registration summary.) You can also use the **View Sections** button to replace a section or CRN. Once you submit the classes for registration and any restrictions have been resolved, the status of `Registered` is displayed, and you have completed registration.

In the Register for Classes path, when a student selects a term where the indicator used to look for third party degree audit system plans is checked on SOATERM and Self-Service planning has been set up on SOATERM and SOAREST, Student Educational Plans (SEPs) from Degree Works or other third party degree audit systems can be pushed into Banner in real time. These SEPs can be used to add courses or classes to the plan in the registration plan summary and are displayed in the Plans tab with any other student registration plans.

Third party registration plans

Third party registration plans, such as those from Degree Works or other third party degree audit systems, can be interfaced with registration planning in Banner Self-Service and used as a reference for creating registration plans. However, third party degree audit system plans (including Degree Works plans) are not editable in the Plan Ahead or Register for Classes paths. They are only a reference from which the Banner registration plans can be created using the Plan Ahead path. In Banner Self-Service planning, processing does not send updates back to any third party degree audit system or Degree Works plan when changes are made to a Banner student registration plan in the Plan Ahead path. Degree Works plans and third party plans can also be used in the Register for Classes path for performing direct registration.

Technical Note: The interface with Degree Works uses JSON returned from a third party degree audit system. When an institution does not have Degree Works, but would like to transfer course or class information into the Plan Ahead and Register for Classes paths, the third party service should follow the JSON format used and understood by registration planning.

Degree Works Student Educational Plans (SEPs) are created in the Degree Works Student Planner. The Degree Works SEP plan names are initially presented on the Select a Plan page to inform the student of their existence. Degree Works SEPs are displayed below existing plans once the check for third party degree audit plans has been completed. Plans are displayed in detail on the Degree Works Plans tab once a student has chosen to create a plan or edit an existing plan. The Degree Works plans cannot be updated, but they can be accessed and used as a reference to build plans via the Plan Ahead path or to register for classes from the Register for Classes path.

When the student uses the Plan Ahead path and selects a term code, he/she is taken to the Select a Plan page. When the student chooses to create a new plan or edit an existing plan, the Find Classes page is displayed. The Degree Works Plans tab is also available, and SEPs from Degree Works are displayed based on the settings on SOATERM for Self-Service planning. The student can continue to create an individual registration plan based on the Degree Works plan, as well as include courses/classes directly from the Find Classes Results.

Only courses are presented to the user in a Degree Works plan. Degree Works courses can be added directly to the plan summary using the **Add Course** button. If class sections are available for planning, the **View Sections** button can be used to display the sections. You can then select sections and add them to the plan. If a course from the Degree Works SEP is marked as critical, the **Critical** indicator will be displayed as checked in the Degree Works Plan tab. This tells the student the course needs to be taken, or he/she could be off track with degree requirements. Notes entered in the SEP for the Degree Works plan are also displayed in Banner Student Self-Service and are view only.

You may choose to turn off registration planning in the Plan Ahead path. In this mode, student cannot create plans. However you can still allow students to register from Degree Works SEPs or other third party degree audit system plans in the Register for Classes path. In the Register for Classes path, the student must view and select sections associated with the courses listed in the Degree Works plans in order to register for classes using the registration summary.

Faculty member and advisor plan access

Plan access for faculty members and advisors differs based on the Plan Ahead path and the Register for Classes path.

Plan Ahead path and SEPs

Access to the Plan Ahead path in Self-Service for faculty members or advisors is controlled by process rules on the Faculty/Advisor Process Rules Page (SOAFACS). If your institution interfaces with Degree Works, you should consider setting up security on SOAFACS for faculty members or advisors that reflects Degree Works security.

See the “Faculty security - Plan Ahead path” topic in this section for more information on setting up faculty security rules for registration planning.

When the faculty member or advisor clears security associated with the student and is authorized to create student plans in the Plan Ahead path, the existing student SEPs are displayed in the same manner that they are presented to the student. SOATERM rules determine the display of the Degree Works SEPs in the Plan Ahead path based on the settings of the **Term open for Self-Service Planning** and the **Check third party degree audit system plans** indicators.

Register for Classes path

Access to the Register for Classes path by faculty members or advisors requires the entry of the student password in order to register students for classes. Once the password has been entered successfully, the faculty member or advisor is presented with the same user interface as the student. Any registration plans created in the Plan Ahead path are displayed in the Plans tab. Degree Works SEPs that exist for that student are also displayed in the Plans tab when both the **Check third party degree audit system plans** and the **Display third party degree audit system plans in registration** indicators are checked on SOATERM.

Faculty member or advisor created plans - Plan Ahead path

In the Plan Ahead path, any combination of student-created plans and faculty member or advisor-created plans is displayed in the Select a Plan tab. Degree Works plans are also displayed when the interface is in use. Faculty members or advisors can use the Select a Plan tab to create a new plan for a student or view and edit plans *they* have already created for students. They can create new plans in the same manner as students, using the class search or Degree Works SEPs. They can create up to the maximum number of plans specified on SOATERM. Students can view the plans created by the faculty member or advisor in the Plan Ahead path or the Register for Classes path.

The faculty member or advisor must have access to the student ID based on faculty security rules. When the faculty member or advisor logs in with a student ID, he/she can approve or unapprove any student-created plans or plans he/she has created for the student. However, faculty members and advisors cannot mark any plan created by a

student as preferred. Also, faculty members and advisors cannot edit or delete plans created by a student, and they cannot edit or delete any plans they did not create. A student may not edit or delete any plan a faculty member or advisor has created.

Whether plans have been created by advisors, faculty members, or students, only the plan creator is allowed to modify the plan he/she has created. For example, when a student logs in and sees a plan created by an advisor, the student may not agree with all of the advisor's suggested courses/sections and want to modify the plan. However, the student cannot modify that particular plan.

See the topics that follow later in this chapter for more information on “Approved Plans”, “Preferred Plans”, and “Maximum number of plans”.

Faculty security - Plan Ahead path

This section discusses the PLANAHHEAD, DISPLAYSCHEDULE, and CHECKORDER rules on the Process Control Code Validation Page (STVPROC) and the Faculty/Advisor Process Rules Page (SOAFACS).

Existing Banner Faculty and Advisor Self-Service 8.x security processing has been incorporated into the Plan Ahead path. The setup and overall functionality for the PLANAHHEAD process has been included with Banner 9.x. Please refer to the “Overview” chapter in the *Banner Faculty and Advisor Self-Service User Guide* or the “Faculty Load” chapter in the *Banner Student User Guide* for more information on the setup and use of faculty security rules.

The following STVPROC seed data is delivered for use with faculty security in registration planning.

Process	Description	Check Order	Enforce Check Order	PIN Control Allowed	System Required
PLANAHHEAD	Registration Planning	Advisor	No	Yes	Yes

PLANAHHEAD rule

Faculty security is executed for the FACULTY, ADVISOR, and FACULTY AND ADVISOR persona type codes in the Plan Ahead path in Self-Service. When a faculty member or advisor chooses the Plan Ahead path, the rules defined on SOAFACS for the PLANAHHEAD process are followed. The logic associated with the PLANAHHEAD process rules drives access to the Plan Ahead path only.

When the faculty member or advisor enters the student ID and passes security, they can access the Select a Plan page where they can create plans for the student or edit and/or delete plans they have created for the student. The student's schedule, schedule details, and registration information (classes registered in the term selected from the Register for Classes path) are also available for reference. The registration information is displayed when a registration record exists for the student in the term selected for use with

registration planning. Registration and schedule information displayed in the plan summary is view only, and cannot be changed in the Plan Ahead path.

The following SOAFACS seed data is delivered for use with faculty security in registration planning.

Process	Desc	Check Order	Process Available on Self-Service	All Access	PIN Control	Relationship	Primary	Attribute Type Checking	Sys Req
PLANAHEAD	Registration Planning	Advisor	Yes	Yes	No	No	No	No	Yes
PLANAHEAD	Registration Planning	Faculty	No	Yes	No	No	No	No	Yes

DISPLAYSCHEDULE rule

The DISPLAYSCHEDULE process rules on SOAFACS are not checked for registration planning in Self-Service and are not related to the Plan Ahead path. Access to the Plan Ahead path, which includes the student's schedule, schedule details, and current registration information is controlled by the PLANAHEAD process. The DISPLAYSCHEDULE process has not changed and is still used for the existing Banner Faculty and Advisor 8.x Self-Services pages.

CHECKORDER rule

The CHECKORDER rule on STVPROC is used with the PLANAHEAD process on SOAFACS when an ID is defined as being *both* a faculty member and an advisor on the Faculty/Advisor Information Page (SIINST). When an ID is defined as *both* advising and instructing, or when the ID is defined as *both* not advising or instructing, the CHECKORDER rule is necessary to identify which SOAFACS rule is used, the faculty rule or the advisor rule.

The CHECKORDER process for 9.x Self-Service functions in the same manner as in Banner 8.x Self-Service. Please refer to the Banner 8.x documentation listed above for more information about faculty and advisor security.

When a user ID is defined as both a faculty member and an advisor on SIINST (multiple personas exist), the user can choose the persona for the session (Faculty, Advisor, or Faculty and Advisor) on the Persona Selection page when logging in. When a user with a persona of Faculty and Advisor selects either the single Faculty or single Advisor persona, the CHECKORDER rule is still used for that login ID. The system considers the user to have both personas based on the SIINST record, and security is processed accordingly. While the definition of the faculty member or advisor from SIINST is still considered for security purposes, the persona selection chosen during login is used for the column or page display configuration on SOAWSCR.

Plans created by others

In the Plan Ahead path, a user can view plans created by users who are different from the login ID user. These plans are displayed in the Created by Others tab and can be used to add courses and/or sections to a student's plan in the registration plan summary. Plans created by other users may not be modified, but these plans can be viewed and used to assist with building or editing additional plans.

A student has the option to create a new plan or edit an existing plan by accessing the Plan Ahead tab, selecting the Created by Others tab, and viewing plans such as an advisor-created plan. The student can then select courses/sections from the advisor-created plan and any other plans listed in the Created by Others tab to create a new plan. The student can use the **Add** button to select specific courses/sections or the **Add All** button to select all the courses/sections from plans that were created by other users. The student can also add more courses to the new plan by searching for additional classes using Find Classes.

This processing is not dependent on the persona of the login user. Any plans created by a user who is not the login user are displayed in the Created by Others tab. Choosing **Add** or **Add All** for courses in plans in this tab works the same way for various personas.

When open learning sections are added from the Created by Others tab, the user is not prompted to enter begin and end dates. The dates are defaulted from the original plan and can be viewed in the Schedule Details section of the page. If the defaulted dates are not acceptable, the section can be removed from the plan, and a search can be performed using Find Classes to add an open learning class with preferred begin and end dates.

Using Add All

The **Add All** button on the Created by Others tab is used to add all courses and/or sections in a plan to the plan summary. Restriction checking does not occur, so if **Add All** is selected multiple times, the same sections and courses will be added to the plan again.

When an open learning class is added to the plan summary using **Add All**, the existing begin and end dates for the class are defaulted from the original plan and are not changed. The dates can be modified if the student decides to register for the open learning class in the Register for Classes path.



Note: The option to **Add All** is not available from the Degree Works tab since course ranges and courses with wildcards may be displayed.

Add All path comparison

Here is a comparison of using **Add All** in two registration paths: the Plan Ahead path with the Created by Others tab and the Register for Classes path with the Plans tab.

Plan Ahead path, Created by Others tab, Add All to the plan summary

- No restriction checking takes place.
- No option is available to select open learning begin and end dates.

- Class sections and courses are added to a plan summary.

Register for Classes path, Plans tab, Add All to the registration summary

- Restriction checking takes place.
- An option is available to select or change open learning begin and end dates.
- Only class sections can be added to the registration summary.

Open learning sections and plans

Open learning course sections can be added to registration plans in the Plan Ahead path. However, the student may already be registered in the same open learning section prior to the creation of the plan, and that course would already have established begin and end dates.

It does not matter whether new begin and end dates are entered for the plan or if **Not Now** is selected from the prompt to skip date entry when the class is selected. The begin and end dates from the registered section are defaulted into the plan summary. This occurs when the class is added individually from the Find Classes search or is selected on the Created by Others tab using the **Add** or **Add All** buttons.

If the student accesses planning and creates or edits a plan, and adds the same open learning section to the plan that is already in registration, any modified begin and end dates that are entered are ignored, and the original dates are defaulted in from the registration record. This occurs regardless of the persona of the user who is creating the plan for the student, and is consistent no matter how the student adds the open learning section to the plan (via the Find Classes search or the Created by Others tab).

If the open learning section selected for the plan has not been previously added to registration for the student, the begin and end dates can be entered or skipped. They are saved in the plan when the class is selected from Find Classes search or are defaulted into the plan when the section is listed in a plan in the Created by Others tab. The begin and end dates can be viewed in the Schedule Details section of the page in the Register for Classes path and the Plan Ahead path.

- When registration *does not* exist for the open learning section, and the student does not want to use the faculty/advisor dates defaulted in from the Created by Others tab, the student can do the following.
 - Remove the section from the plan.
 - Perform a search using Find Classes.
 - Add the section.
 - Choose new begin and end dates.
- When registration *does* exist for the open learning section, and the student does not want to use the faculty/advisor dates defaulted in from the Created by Others tab, the student needs to do the following.
 - Access the Register for Classes path.

- Drop the registered open learning section.
- Return to the Plan Ahead path.
- Choose the registration plan.
- Perform a search using Find Classes.
- Add the section.
- Choose new begin and end dates.

Maximum number of plans

You can define the maximum number of plans for an ID and term in the **Maximum plans for term** field on SOATERM. In the Plan Ahead path, the number of existing plans and the maximum number of allowed plans are displayed to the user. Once the maximum number of plans has been reached for a plan creator, no more plans can be created by that student, faculty member, or advisor. The **Create a new plan** button on the Select a Plan page is no longer enabled when the maximum is reached. However, existing plans can be edited if needed.

The maximum number of plans applies to the user who is creating the plans. It is not the total of plans from combined users or plan creators. For example, if the **Maximum plans for term** field is set to 5 for the term, then the student, faculty member, or advisor can each create five plans.

For example, when the **Maximum plans for term field** is set to 5:

- The student can create 5 plans.
- Advisor 1 can create 5 plans.
- Advisor 2 can create 5 plans
- Faculty member 1 can create 5 plans.
- Faculty member 2 can create 5 plans, and so on.

Adding notes to a registration plan

In the Plan Ahead path, custom notes can be added at the plan name level and/or at the course or section level in the plan summary. Once notes are applied and the plan is saved, a check mark indicates that a note exists. Only notes in the plan summary can be edited. Notes displayed in other locations are display only.

- Only the login ID user can create or edit his/her own notes in the plan summary.
- Notes added by students are display only for faculty members and advisors and cannot be updated.
- Notes added by faculty members and advisors are display only for students and cannot be updated.

- Plan notes on the Plans tab in the Register for Classes path are display only, regardless of the login ID user.

Study paths and plans

Study paths can be selected when they are set up to display for the term. In the Plan Ahead path, when the student selects a study path on the Select a Term page, only plans associated with that study path are displayed on the Select a Plan page. If a study path is not selected on the Select a Term page, plans associated with study paths are not displayed on the Select a Plan page.

Plans that are associated with study paths are presented independently and displayed with the selected study path. For example:

- If term 203610 and study path 1 are selected upon entry to the Plan Ahead path, only student registration plans with study path 1 are presented. The new student plans that are created will be associated with term 203610 and study path 1.
- If term 203610 and study path 2 are selected upon entry to the Plan Ahead path, only student registration plans with study path 2 are presented. The new student plans that are created will be associated with term 203610 and study path 2.
- If term 203610 is selected *without* a study path upon entry to the Plan Ahead path, only student registration plans with no associated study paths are presented. The new student plans that are created will be associated with term 203610 and no study path.

All student-created registration plans are counted against the maximum number of plans allowed on SOATERM, regardless of the selected study path. Degree Works plans are displayed in the Degree Works Plans tab, regardless of whether a study path has been selected.

Study paths are not required in the Plan Ahead path. No error is displayed when a student has a study path and does not select it in this path. Study paths are required in the Register for Classes path when the **Study Path Required** indicator is checked on SOATERM. If a study path is chosen, only those student registration plans with the associated study path will be displayed as available for registration in the Plans tab. Degree Works plans will be displayed in the Plans tab, regardless of whether study paths exist.

Approved plans

Faculty members and advisors can approve or unapprove plans they have created for a student, as well as approve or unapprove student-created plans. Multiple faculty members can approve or unapprove the same student plan if they have access to that student's planning information. Students cannot approve plans and are not required to register from an approved plan. When an approved plan or plans exist, the student can still register from any other plan in the Plans tab in the Register for Classes path. The use of approved plans is optional.

To use approved plans, configure the ADVISORAPPROVEDPLAN field item on SOAWSCR for the appropriate persona, page, and effective term to activate the use of the

"Approved" notation. "Approved" is displayed on plans in the Plan Ahead path and the Register for Classes path. It is also displayed in the plan summary. *The "Approved" value is display only. It is not tied to any logic or functionality.*

Plans that have not been approved display the **Approve This Plan** link. You can click on the link and approve any plans. The persona and name of the approver are displayed with the plan. Approved plans display the **Remove Approval** link. The faculty member or advisor can click on the link to unapprove the plan. Only faculty members or advisors can use the **Approve This Plan** or **Remove Approval** links.

The field items for the **Approve This Plan** or **Remove Approval** links can be configured on SOAWSCR to be displayed or not be displayed, and the descriptions can be modified. The display position setting on SOAWSCR is not used. The field items are always located in the same position on any page where they are displayed.

Preferred plans

Students have the option to choose one preferred plan from plans they have created. Only one plan can be designated as preferred at any time. When in the Register for Classes path, a student can select any plan in his/her plan list for registration. The student's preferred plan is displayed at the top of the list of registration plans. However, the student is not required to register from a preferred plan. The use of preferred plans is optional.

Students cannot make a plan preferred when that plan was created for them by faculty members and advisors. Faculty members and advisors cannot make a student-created plan a preferred plan. A Degree Works plan cannot be designated as preferred.

When three or more plans exist, and the preferred plan is deleted, the user receives a message that another plan should be selected to be the preferred plan. The user can select a new preferred plan, and then the former preferred plan can be deleted. When a student has two plans and one is deleted, the remaining plan automatically becomes the preferred plan.

Configure the display of the PREFERREDPLAN field item on SOAWSCR for a persona, page, and term to activate the use of the "My Preferred Plan" notation. The field can be configured to be displayed or not be displayed, and the description can be modified. The display position setting on SOAWSCR is not used. The field items are always located in the same position on any page where they are displayed. *The "My Preferred Plan" value is display only. It is not tied to any logic or functionality.*



Note: Faculty members and advisors cannot modify the setting for the PREFERREDPLAN field item on SOAWSCR.

The notation of "My Preferred Plan" is displayed for plans in the Plan Ahead path and the Register for Classes path. Only one student plan displays the "My Preferred Plan" notation. The remaining student plans display the **Make preferred** link. The student can click on the link and make another plan the preferred plan. The new preferred plan is then moved to the top of the list of plans. "My Preferred Plan" is also displayed in the plan summary.

Important Note: When a student creates one plan for a term, that plan is automatically identified as the preferred plan by default. If you have students who created registration

plans in the Banner Student Registration 9.0 Controlled Release 1, an optional script is provided that can be run after Banner Student Registration 9.2 is installed. This script sets a student plan as preferred. Refer to the topic “Update preferred plans that were previously created in release 9.0 CR1” in this section for more information.

Study paths and preferred plans

When a student has a registration plan with an associated study path, he/she needs to decide whether that plan should be the preferred plan. Only one registration plan can be the preferred plan, even if plans with study paths exist.

When only two plans have been created by the student and the preferred plan is deleted, the remaining plan is marked as preferred by default, even if the remaining plan is not displayed. This could be the case if the student had one non-study path plan and one study path plan.



Note: It is not recommended that an institution change study path access during a term. This could prevent a student from accessing the plans associated with the study path.

In the Plan Ahead path, when plans with study paths exist for the student, and the student does not choose a study path, plans with study paths are not displayed for selection as the new preferred plan. To select the preferred plan in this case, the student needs to do the following:

- Exit from the Select a Plan page.
- Go back to the Select a Term page.
- Choose a different path (study path or no study path).
- Select a preferred plan.
- The student can then return to the original path and delete the plan that is no longer needed.

Personas and planning

Here are some basics for what a user with the `FACULTY` and/or `ADVISOR` persona type code can do in registration planning. The login user ID is associated with the persona. So each time “user” is mentioned below, it applies to the login user ID associated with the persona.

- Any user with a persona type code of `FACULTY` and/or `ADVISOR` that logs into planning with a selected student ID (password) can continue with registration planning and do the following.
 - View any plans for that student, regardless of who created the plans for that student.
 - Approve plans created by that student.
 - Create a plan for that student and then approve the plan.

However, this user *cannot* approve plans created by different users with a persona type code of FACULTY, ADVISOR, or FACULTY AND ADVISOR.

- Only users with a persona type code of STUDENT can make a registration plan the preferred plan. Users with a persona type code of FACULTY, ADVISOR, or FACULTY AND ADVISOR cannot make a plan the preferred plan.
- Only users with a persona type code of FACULTY, ADVISOR, or FACULTY AND ADVISOR can approve registration plans. Users with a persona type code of STUDENT cannot approve plans.
- No plans can be edited by any other user, regardless of persona. The exception is the option for the FACULTY, ADVISOR, or FACULTY AND ADVISOR persona type codes to approve student-created plans.

See the “Using Personas” topic in the "Registration Setup and Use" chapter for more information on persona types, Web Tailor role mappings, persona assignments, processing flow, faculty security, and Registration Landing page configuration.

Plan access for the Registrar persona

Plans presented to the user with the REGISTRAR persona provide the same user experience as those presented for a student or faculty member and/or advisor. When planning is open for the term, and plans are set up to display in Self-Service Registration, the Plans tab is displayed for the Registrar persona in the Register for Classes path.

Existing registration plans created by the student are displayed in this path, as are any registration plans created for the student by faculty members and/or advisors. The persona and name of the plan creator are displayed, as well as the student’s preferred plan and any faculty member or advisor approved plans. When third party degree audit system plans are set up to display and the Degree Works interface is active, SEPs from Degree Works are displayed if they exist for the student. No data in the Plans tab can be edited, but any notes associated with a plan can be viewed.

A user with the REGISTRAR persona does not have access to the Plan Ahead option on the landing page and cannot create student registration plans in the Plan Ahead path. However, this user can access the Register for Classes path and add classes directly to the registration summary for a student using the Class Search and Registration page, the Enter CRNs tab, the Plans tab, or the Blocks tab (if it is available).

It is suggested that the Plan Ahead option be removed for the REGISTRAR persona. This can be performed on the Overall Page and Field Configuration Page (SOAWSCR) for the following data items:

- **Persona** - value of REGISTRAR (Registrar)
- **Page** - value of 1000 (Landing Page)
- **Field** - value of LANDINGPLANAHEAD
- **Effective Term** - value that is appropriate

Plan display order

Student registration plans are displayed in the following order whether the user is in the Plan Ahead path or the Register for Classes path.

1. Student's preferred plan
2. Student's approved plans by sequence number in ascending order
3. Student's non-approved plans by sequence number in ascending order

In the Select a Plan tab in the Plan Ahead path, the student can designate one of plans he/she has created as the preferred plan and thus set the display hierarchy. When a student designates a different plan as the preferred plan, a message is displayed in the Notification Center that the plan has been made the preferred plan. The new preferred plan is always displayed first.

Also in the Select a Plan tab in the Plan Ahead path, faculty members and advisors can designate which plans are approved or unapproved, which also affects the hierarchy. The approval or unapproval includes student-created plans and faculty member or advisor-created plans. When a faculty member or advisor approves a plan, a message is displayed in the Notification Center that the plan approval has been updated, and the plans are reordered appropriately.

Update plans created in release 9.0 CR1 as preferred plans

The following information should be reviewed by Development Partners or institutions who installed release 9.0 CR1 with the option for students to create registration plans in the Plan Ahead path and who did not migrate to release 9.1 CR2.

The information below is not applicable to Development Partners or institutions who have installed and are using release 9.1 CR2 or who will be new to Banner Student Registration with the installation of release 9.2.

Registration plans created using the Banner Student Registration 9.0 CR1 release were created before the preferred plan functionality was available. With the delivery of Banner Student Registration 9.1 CR2, *students must always have one plan designated as preferred.* The `sfbplanu_080605.sql` script is used to update plans created from the 9.0 CR1 release to be preferred plans when students have multiple plans. This is an optional script.

This script *must* be run manually. It is *not* part of the upgrade. It evaluates all existing student plans from the 9.0 CR1 release, updates the student's plan with the most recent date and the highest sequence number within the term to be the "Preferred" plan. All other plans are marked as "Not Preferred".



Warning! *If the script is run against plans that were created after release 9.1 CR2 has been installed, existing preferred plans could be incorrectly changed.*



Warning! *If the script is not run, and the 9.1 CR 2 release is installed, all existing student plans will be set to "Preferred". Once this occurs, the student cannot change an existing plan to be "Not Preferred".*

If you choose not to run the script that will identify a single plan as preferred, have students do the following to reset their plans and return to having a single plan be the preferred plan.

1. Log in to the Plan Ahead path.
2. Create a new registration plan.

If the maximum number of plans has been reached, a plan must be deleted.

3. Save the plan.
4. Access the Select a Plan tab.
5. Set the new plan as the preferred plan.

The rest of the plans for the student will be refreshed automatically and marked as not preferred.

6. Standard functionality can now be followed to mark plans as preferred.

Processing

This section contains information about setting up and using registration plans.

Use the following tabs in Banner Student Self-Service for planning.

- Plans tab on the Class Search and Registration page.
- Degree Works Plan tab on the Plan Ahead page.
- Created by Others tab on the Plan Ahead page.

See the "Self-Service Registration" chapter for page and field detail.

The following Banner Student 9.x administrative pages are used with registration planning:

- External API Information Validation Page (STVREST)
- External API Connection Information Page (SOAREST)
- The Term Control Page (SOATERM)
- Overall Page And Field Configuration Page (SOAWSCR)

The following tables are used specifically with Banner Student 9.x registration planning:

- Registration Plan Base Table (SFBPLAN)
- Registration Plan Repeating Course Table (SFRPLAN)

- Restful API Connection Information Table (SOBREST)
- Restful API Integration Codes Validation Table (STVREST)

Planning path

Here is a sample path for getting started and navigating through registration planning.

To create a new plan or work with an existing plan

1. Select Plan Ahead from the Registration Landing page.
 - 1.1. Use the Select a Term page to choose a term.
Terms that are open for planning are listed.
Study paths can be selected at this point if they are available.
 - 1.2. Use the Select a Plan page to edit or delete an existing plan or create a new plan.
The maximum number of available student registration plans allowed for the term is displayed. A message is displayed when the student has reached that threshold. While plans may not be created in excess of the maximum, existing plans can be edited or deleted. A message is also presented to indicate whether the plan will be associated with a study path, similar to the Register for Classes path.

When a study path has been selected, *only* plans associated with the selected study path are displayed or can be created. When no study path has been selected, new or existing plans that are displayed are not related to study paths. All combinations of plans are counted against the maximum number of plans allowed. But all plans may not be visible if a combination of plans has been created with and/or without study paths.
 - 1.3. To create a new plan, click on the **Create New Plan** button, and use the Plan Ahead - Find Classes tab to search for courses.
 - 1.4. Use the Plan Ahead - Find Classes and Find Classes Results to add courses to the plan, view sections for a course, and add those sections to the plan as needed.

Courses and/or sections can be added to a registration plan. However, sections need to be made available in planning on SOATERM.
 - 1.5. View the schedule, schedule details, and summary information for the selected courses and sections.

Courses or sections have a status of *Pending* in the Summary section of the page until the plan is saved.

Notes can be added to the plan at this point.
 - 1.6. Save the plan.
 - 1.7. Enter the plan name in the Name your Plan window and save.

Plans can be saved and set aside until you are ready to use them to register for classes in the Register for Classes path.

Courses and sections in the Summary section of the page now have a status of `Planned`.

Notes can also be added or modified at this point. Any notes updated prior to saving the plan are displayed with a check mark.

2. Return to the Registration Landing page and select Plan Ahead.

2.1. Use the Select a Term page to choose a term.

Use the Plans - Select a Plan page to work with an existing plan.

Available options include creating a new plan (if the maximum number of plans has not been reached) and preferring or approving plans.

Student registration plans are displayed in the Plans tab based on the Self-Service Planning settings on `SOATERM` and the configuration on `SOAREST`.

2.2. Use the **Edit** and **Delete** buttons to change course selections in an existing plan or delete plans as needed.

2.3. Save the edited plan.

Plans can be saved and set aside until you are ready to use them to register for classes in the Register for Classes path.

Once the plan has been saved, courses and sections in the Summary section of the page have a status of `Planned`.

To register from a plan

3. Return to the Registration Landing page and select Register for Classes.

3.1. Use the Select a Term page to choose a term.

3.2. Select a study path if one is needed and study paths are available.

3.3. Use Register for Classes to access registration plans.

3.4. Use the Plans - Register from a Plan page to select sections from student registration plans or Degree Works plans if they are available.

A combination of classes and/or courses can exist in student registration plans. Only courses are always displayed in Degree Works plans. Only classes or sections may be added to the registration summary.

When a study plan is selected in the Register for Classes path, only student registration plans associated with that study path are displayed in the Plans tab. Degree Works plans are displayed, regardless of the selected study path.

3.5. Add courses and/or sections to the plan.

– When only courses are listed in a plan, view sections and add them to the registration summary, and then use the **Return to Plan** button to continue working in the Plans tab.

– When only sections are listed in a plan, add a section to the registration summary. If the student has decided to select a different section, view sections and add the replacement section to the registration summary.

There is no restriction to register for classes from the Plans tab. Use the Find Classes tab to search for and add sections to the registration summary. You may also access the Enter CRNs tab to add CRNs directly or access the Blocks tab for block registration, if either of those tabs is available in the Register for Classes path.

- 3.6. Use the **Submit** button to register for the all of the classes in the registration summary.

Saved classes in the Summary section of the page have a status of Registered.

To use Degree Works plans

4. Create a registration plan using Degree Works plans.

Degree Works plans can be used in two ways. Choose how you want to create the plan.

- In the Plan Ahead path, a Degree Works SEP can be used to create a student registration plan in the plan summary.
- In the Register for Classes path, you can register directly from a Degree Works SEP.

5. When using Degree Works plans to create a registration plan, access the Registration Landing page and select Plan Ahead.

- 5.1. Use the Select a Term page to choose a term.

- 5.2. Use the Select a Plan page to edit or delete an existing student registration plan or to create a new plan.

When the appropriate setup and configuration have been performed on SOAREST and SOATERM, the Degree Works Plans tab is displayed on the Plan Ahead page.

- 5.3. Use the Degree Works Plans tab to access Degree Works SEPs and create or edit the student registration plan in the Summary section of the page.

The number of available SEP plans from Degree Works for the term is displayed. A message is displayed if no plans are available.

- 5.4. View the Degree Works plans and any associated notes.

Plans and notes from Degree Works are view only and cannot be modified.

- 5.5. Use the **Add Course** button to add Degree Works courses to the student registration plan.

- 5.6. View sections associated with courses listed in the Degree Works plans and add the sections to the student registration plan.

Degree Works plans consist only of courses, so if sections have been made available in the planning term on SOATERM, you can view sections for the courses and add them to the registration plan in the Summary section of the page.

- 5.7. Save the plan.

- 5.8. Continue as in step 3 above for Register for Classes to display and register for classes directly from Degree Works plans.

Degree Works plans consist only of courses, so you always need to view sections from a Degree Works course and add the associated section to the registration summary.

Set up Degree Works

Refer to the *Degree Works Installation Guide* for information on setting up Degree Works for use with Banner registration planning. This should be done before setting up SOAREST as described in step 3 below in the “Set up registration planning” topic.



Note: The minimum version of Degree Works that should be used to bring SEPs into registration planning is Degree Works 4.1.3.

There are two main tasks to complete in Degree Works.

1. Identify the URL to be used on SOAREST for the Degree Works component.
2. Define the role of `RSPLAN` to be used with the username and password on SOAREST.

See step 3 below under “Set up registration planning” for more information on the URL format.

Set up registration planning

Do the following to set controls for student registration planning.

1. On the Term Control Page (SOATERM), verify the settings for the following Self-Service Planning indicators.
 - 1.1. Set the **Term open for Self-Service Planning** indicator to checked or \surd , to turn on registration planning for the term.

This makes the term available on the Select a Term page.
 - 1.2. Enter the number of plans allowed per user login ID for the planning term in the **Maximum plans for term** field.

When planning is activated for the term, the value must be between 1 – 999 and cannot be 0.

This field will always allow a valid value. If the value had been set to 5 and was then later changed to 1, a student who had created five plans could continue to edit those plans. Students with more than one plan would not be allowed to create new plans.
 - 1.3. Set the **Display Self-Service plans in registration** indicator to checked or \surd , to display student registration plans in the Register for Classes path and allow students to add sections to the registration summary.

- 1.4. Set the **Allow adding course sections to plan** indicator to checked or Y , to allow the student to add class *sections* to a student registration plan in the Plan Ahead path.

When this indicator is unchecked, only *courses* can be added to the student registration plan. This option can be used when class sections for the term are not yet ready at the time students begin building their registration plans.

For third party plans, additional settings on SOATERM are used.

- 1.5. Set the **Check third party degree audit system plans** indicator to checked or Y , to tell the system to look for third party registration plans that can be used in Self-Service.

When checked, the system checks for third party data based on settings defined on STVREST and SOAREST. See steps 2 and 3 below.

- 1.6. Set the **Display third party degree audit system plans in registration** indicator to checked or Y , to display third party registration plans in the Register for Classes path on the Plans tab. Students can view sections for Degree Works plan courses and add the sections to the registration summary.

For more details on these controls, see the "Term Control Page (SOATERM)" section under the "Administrative Pages" topic at the end of this chapter.

2. Ensure that codes used for registration planning and Degree Works (or other third party systems) exist on the External API Information Validation Page (STVREST).

The system required code of RPL, *Registration Planning*, is delivered.

3. Set up server connections for third party degree audit systems on the External API Connection Page (SOAREST).

- 3.1. Enter a code of RPL for Registration Planning.

- 3.2. Enter the username, password, URL, and timeout information for the connection.

Enter the following for the URL:

```
serverURL:serverPort/DWPath/api/plans
```

For example:

```
- http://myDWServer1.uni.com:8080/dwservice/planner/  
  api/plans
```

```
- http://myDWServer2.uni.com:8080/myservice/  
  dwplannerservice/planner/api/plans
```

Timeout data is entered in seconds. A setting of 0 or Null is equal to no timeout.

4. On the Overall Page and Field Configuration Page (SOAWSCR), define the persona, page, and effective term field configurations for registration planning.

Disable planning but allow students to register from third party plans

Institutions may choose to prevent students from creating registration plans in the Plan Ahead path, but still allow students to access third party degree audit system plans for registration in the Register for Classes path.

Use the following steps to modify your registration planning setup to only allow students to register from degree audit third party plans or SEPs from Degree Works. When these steps are performed, students cannot create new registration plans in the Plan Ahead path.

1. Set the **Term open for Self-Service Planning** indicator to checked or N, to turn off registration planning for the term.

The term is not available on the Select a Term page. Only terms open for planning are available for selection on the Select a Term page in the Plan Ahead path.

2. Review the setting for the **Display Self-Service plans in registration** indicator.

If at some point the selected term was open for planning and students created registration plans for that term, the plans would be displayed in the Register for Classes path when this indicator is checked or Y. If the requirement is to *only* display third party plans in registration, this indicator should be unchecked or N.

3. Set the **Check third party degree audit system plans** indicator to checked or Y, to tell the system to look for third party registration plans that can be used in Self-Service.

When checked, the system checks for third party data based on settings defined on STVREST and SOAREST.

4. Set the **Display third party degree audit system plans in registration** indicator to checked or Y, to display third party registration plans in the Register for Classes path in the Plans tab.

In the Register for Classes path, students can view courses from Degree Works plans and then view and add the sections to the registration summary.

Administrative pages

The following administrative pages are used with this functionality. Refer to the *Banner Student 9.x Online Help* for additional page information and field descriptions.

External API Information Validation Page (STVREST)

The External API Information Validation Page (STVREST) is used to create and maintain codes for external APIs used to connect with third party products. This page should be set up and monitored by technical administrators. A system-required code of RPL has been delivered for use with registration planning and connections to Degree Works.

External API Connection Information Page (SOAREST)

The External API Connection Information Page (SOAREST) is used to create and maintain external API codes, server connections, and login data used with third party products that need to connect with Banner Self-Service. This page should be set up and monitored by technical administrators.

This page can be used with registration planning to allow Banner Self-Service to connect with third party degree audit systems such as Degree Works. The Degree Works Student Educational Plan (SEP) information or other third party degree audit system plans are displayed in Banner Student Self-Service. External API codes for registration planning must exist on the External API Information Validation Page (STVREST).

Term Control Page (SOATERM)

Use the Self-Service Planning section of this page to define controls for registration planning in the Plan Ahead path and the Register for Classes path in Self-Service.

Self-Service Planning

Use this section of the Term Information to view and set up the registration plan controls for Self-Service. Controls are:

- **Term open for Self-Service planning**
- **Maximum plans for term**
- **Display Self-Service plans in registration**
- **Allow adding course sections to plan**
- **Check third party degree audit system plans**
- **Display third party degree audit system plans in registration**

You can update the indicators and save the changes. If you check and then later uncheck the **Term open for Self-Service planning** indicator to close the term for registration planning, other Self-Service planning settings remain updated and will be checked by the system and processed accordingly.

For example, if the **Term open for Self-Service planning** indicator is unchecked for the term, but the **Check third party degree audit system plans indicator** is checked, and the **Display third party degree audit system plans in registration** indicator is checked, planning in the Plan Ahead path will not be available for the term. However the degree audit system plans would continue to be displayed and be available for registration in the Register for Classes path in the Plans tab.

Also, if the term is closed for planning but the **Display Self-Service plans in registration** indicator is checked, any student registration plans that had been created prior to the close of planning will be displayed in the Register for Classes path in the Plans tab.

Here are the details for the registration plan controls.

Fields	Descriptions
Term open for Self-Service planning	<p>Check box used to indicate whether the term is available to create or edit student registration plans in Self-Service.</p> <p>When checked, this makes the term code available from the Select a Term page in the Plan Ahead path.</p>
Maximum plans for term	<p>Maximum number of registration plans that can be created per login ID for the term.</p> <p>When the Term Open for Self-Service planning indicator is checked, the valid range is 1 – 999. You must select a value between 1 and 999 to save the record.</p> <p>When the Term Open for Self-Service planning indicator is not checked, the value can be 0.</p>
Display Self-Service plans in registration	<p>Check box used to indicate whether student registration plans are displayed in the Register for Classes path, so students can add sections from their plans to the registration summary.</p> <p>When this indicator is checked, the Plans tab is displayed in Self-Service.</p>
Allow adding course sections to plan	<p>Check box used to indicate whether the student can add class sections to a registration plan in the Plan Ahead path.</p> <p>When checked, sections can be added to the student's registration plan. When unchecked, only courses can be added to the student's plan.</p>
Check third party degree audit system plans	<p>Check box used to indicate whether the system will look for third party degree audit plans that can be used for the Plan Ahead or Register for Classes paths.</p> <p>When this indicator is checked, the system checks for third party data based on the SOAREST configuration.</p>
Display third party degree audit system plans in registration	<p>Check box used to indicate whether third party registration plans are displayed in the Register for Classes path. This allows students to view and add class sections from the third party degree audit plans (such as Degree Works SEPs) to the registration summary.</p> <p>When this indicator is checked, the Plans tab is displayed in Self-Service.</p>

Structured Registration

This chapter details the setup and processing for structured registration.

Overview

In Banner Student Registration, the term "structured registration" refers to a registration model where students are guided through the class selection based on their academic program requirements. To use this processing effectively, the academic program definition should be constructed so that the requirements occur in chronological order. In addition, there should be a clear delineation between requirements for each student classification or academic stage. For example, the academic program should have a distinct set of coursework from which the student must choose in order to progress from Freshman to Sophomore or from Year 1 to Year 2.



Note: Only the student persona has access to Self-Service structured registration at this time.

For each stage defined in an academic program there are three categories into which coursework can be divided: mandatory, optional, and elective.

- Mandatory courses are specific courses the student must take in order to progress from one stage to the next.
- Optional courses are courses that relate closely to the student's major, and the student might be asked to choose a number of courses from a specific list.
- Elective courses are broadly defined selections using course ranges, attributes, departments, and so on.

Settings on the Term Control Page (SOATERM) provide processing controls that define when mandatory, optional, or elective coursework is available for students in Self-Service. Students may only drop classes that are part of structured registration if the type (mandatory, optional, or elective) is active.

SOATERM also contains controls that allow missing courses to be considered as a fatal error, a warning, or no error. When error checking is set to `Fatal`, the student will not be able to save any of the registration record until all requirements are met, and registration cannot continue. When error checking is set to `Warning` or `None`, if errors occur, the student is allowed to continue with registration until the requirements have been met.

Rules on the Crosswalk Validation Page (GTVSDAX) serve as processing controls for CAPP areas using class codes, priorities, or naming conventions.

CAPP overview

Structured registration uses Banner Student 8.x CAPP rules and programs to facilitate registration. Courses are displayed on Self-Service registration pages that are specifically related to the student's primary academic program or the student's selected study path. Students must register for the courses presented to them. Students are not allowed to directly enter CRNs or search for classes which do not meet the CAPP criteria. When CAPP is not used, an external API can be used to request data from external third party applications and receive a list of projected courses to be processed in Banner.

In order to make use of CAPP program definitions for structured registration, guidelines must be followed in order for processing to determine which requirements are designated as mandatory, optional, or elective. These guidelines ensure that CAPP data used includes program definitions, along with the associated areas, groups, and rules that are attached to areas or groups. Curriculum records are selected as follows.

- The student's selected, current and active curriculum record is used and is matched to the CAPP program requirement.
- When study paths are in use, the student's primary, current and active program for his/her study path is used.
- The catalog term for the curriculum record is used to match the effective term of the CAPP program requirement data.
- If the curriculum record does not have a catalog term, the registration term is used to find the effective term of the CAPP program requirement data.

Unlike projected registration, it is not necessary to run compliance to use structured registration. Compliance concerns classes that have already been completed. Structured registration assumes the coursework required within each registration period stands on its own and does not overlap with prior registration periods. Based on his/her stage or classification, the student must work with the displayed requirements in order to select class sections and complete registration. When a student logs in to registration, the registration process compiles the structured registration data based on his/her primary current and active program or study path program. When the student submits the selected classes in the summary for registration, structured registration processing verifies that all the program requirements have been fulfilled for the registration period.

Data used in structured registration is pulled from CAPP one time and is not recalculated for subsequent logins. Data must be changed in CAPP before students log in and begin registration, in order to be reflected in structured registration. Coursework already taken by the student is not considered in the compilation of structured registration data. The SFKRGST/SFKRGST1 package is used to collect data from CAPP and build records for structured registration to guide students as to what courses are needed for registration.

Please see the *Banner Student CAPP Handbook* for more information on setting up and using CAPP.



Note: It is assumed that CAPP is in use at your institution. If it is not in use, please refer to the "Use external API" section to set up processing with the third party system that will provide data for use with structured registration.

Comparison of projected and structured

Projected registration and structured registration are similar but different. Here is a quick summary of the differences.

Projected registration works as follows:

- The focus is on what has yet to be completed, based on what has already occurred in the past.
- No validation of how coursework will satisfy specific program requirements is performed.
- Courses are presented to the student in a practical order based on prior coursework and the organization of requirements in CAPP.
- The course presentation is flexible, as to how much is shown to the student at one time.
- A course that is identified as mandatory is one that is required for the degree but is not required for the current registration period.
- Students can select courses from the projected list based on what they perceive as best for them.

Structured registration works as follows:

- The focus is on the student's current stage or classification and what coursework is required based on the student's academic program.
- Coursework is based on the categories (mandatory, optional, and electives) that make up the requirements of the current registration period.
- The focus is on subject matter for courses that are closely related to the student's area of study.
- Each year of coursework is regimented, strictly organized, and controlled.
- A mandatory course is a course that must be taken in the current registration period.
- Students are guided through each registration period.
- Students are directed as to what courses they must take, and they cannot deviate from the structured requirements.
- Validation of selected coursework against specific program requirements is performed.

Processing

This section contains information about setting up and using structured registration. In summary:

- Set up structured registration controls on the Term Control Page (SOATERM).
- Define GTVSDAX rules as processing controls.

- Access the Structured tab Banner Student Self-Service to use structured registration.

The following tables are used specifically with Banner Student 9.x structured registration.

- Structured Registration Header Table (SFBSTRH)
- Structured Registration Rule Detail Table (SFRSTRD)
- Structured Registration Term Control Table (SOBSTRG)

The following Banner views are used specifically with structured registration.

- SFVRGCP0 - used to select areas for a student's curriculum based on rules on GTVSDAX that identify how areas are coded.
- SFVRGCP1 - used to select student data and match the data to program requirements.
- SFVRGCP2 - used to select the GTVSDAX rule for identification of CAPP requirements. The internal code group REGPROJSTRUCT is selected for the internal group AREAGROUP or CLASS.
- SOVCLTP - used to select the primary, current and active, concurrent curriculum record for a term. The term must be included to use this view, where `SOVCLTR_STVTERM_CODE = 'XXXX'`.
- SOVCLTR0 - used to select the concurrent curriculum record for a term. The term must be included to use this view, where `SOVCLTR_STVTERM_CODE = 'XXXX'`.

CAPP data detail and display

When CAPP is in use, CAPP program requirements for areas, groups, rules, and courses are considered for structured registration. The data is extracted and presented to the student in Self-Service for selection. Checks occur to make sure registration can continue based on the student's choices. Settings on SOATERM for mandatory, elective, and optional coursework direct how these categories are identified in the CAPP program definition and whether or not those categories must be completed by the student. Rules on GTVSDAX are used to match a CAPP area to a student by associating a class code to a priority, or by associating the CAPP area name to a class code using a naming convention. (See the " GTVSDAX Rules" section for more information.)

In Self-Service, the student is guided down through the CAPP requirements into the detailed course requirements, where he/she is allowed to select classes from a specific list. When courses are selected and added, they are displayed in the registration summary, where they can be submitted for registration. Errors are displayed in the Notification Center and can be corrected.

CAPP allows text to be attached to the rule header. This text can be used to provide additional information to the student about the requirement. In addition, a URL can be entered into the rule text which will allow the student to navigate to a website or document for additional clarification about the specific requirement or the academic program. CAPP also allows for text entries to be associated with a type. SOATERM is used to associate a specific CAPP text type with the informational text that is available to the student in structured registration. A separate text type is used to identify the URL to which the student can navigate.

The CAPP detail used in structured registration comes from the Program Requirements Page (SMAPROG), the Area Requirements Page (SMAAREA), and the Group Requirements Page (SMAGROP). The configuration below describes the basic organization of data within CAPP. This organization is tiered and allows structured registration to distinguish at the stage or classification at which student is positioned. It also presents a significant opportunity for students to pick from lists of courses. Each tier supports course ranges, credit hour ranges, and condition ranges. Conditions can be explicit and implicit (sets and subsets).

Program, area, and group data

This section discusses how data from CAPP is used in structured registration.

Program

A program makes the association between the student's curriculum and CAPP.

Area

Areas are the building blocks of a student's academic program requirements. There are two types of areas, group areas and course areas. As their names imply, group areas are areas made up of groups, and course areas are made up of course requirements. Groups are basically mini-areas which are made up of course requirements. For structured registration, each area represents what a student must complete for a stage or classification within a registration period.

An area can be either a group area or a course area. By convention, each area can contain requirements for mandatory, optional, and elective coursework. The determination of which type of requirements belongs to an area is controlled by entries made on SOATERM.



Note: Areas can be captive or dynamic. For more information on the difference between captive and dynamic areas, see the *Banner Student CAPP Handbook*. When dynamic areas are used, the association between stage or classification must be contained within the area name.

Course area

Course areas are made up of:

- area course/attributes attachments
- area course/attributes attachment rules

Group area

Group areas are made up of:

- area group attachment
- area group attachment rules



Note: Set and subset designations can be used for attachments to both group areas and course areas and allow for the construction and processing of course lists. For more information on sets and subsets, see the *Banner Student CAPP Handbook*.

Other attributes

Characteristics from CAPP course records may also be used, to make requirements more specific, including:

- attributes
- campus
- college
- department

Requirement types

Data extracted from CAPP falls into three types or collections of requirements (mandatory, optional, and elective) based on the area attachments.

- Type 1 (mandatory) is collected by rule name or specific course area attachment (only the subject and course number low exist), or by single set and subset (related to groups).
- Type 2 (optional) is collected by rule name only as identified on SOATERM. Generally, courses identified as optional closely relate to a student's major or program.
- Type 3 (elective) is collected by rule name only as identified on SOATERM. Generally, these requirements are very broad and allow the student considerable freedom in selection.



Note: The above descriptions are simply general guidelines. There is no hard and fast rule that differentiates one type from another.

Structured registration does not take into consideration CAPP entries that might exist on the include and exclude at course level or restricted subject and attributes processing.

Tiered structure example

Here is example of the tiered structure. The student is asked to pick two items from a list of three items. The first available item is a course range where the course must have an attribute of "Medieval Literature". The second item is a course range where the course must have an attribute indicating the course is "Non-Shakespearean". The third item is a complex item requiring the student to make multiple selections in order to complete the single requirement.

Pick 2 from 3:

- Pick 1 from EN 2000 to En 2999 with Attribute MDLV (Medieval Literature)
- Pick 1 from EN 2000 to EN 2999 with Attribute NSHK (Non-Shakespearean)
- Pick 1 of the conditions below:
 - Condition 1:
 - Course A
 - Course B
 - Course C
 - Course D
 - Condition 2:
 - Pick 2 from EN 2000 to 2999 with attribute AAA (American Author)

SMAPROG general requirements

Access to the general requirements on SMAPROG is based on the student's primary program, unless the student has selected a study path. If the student has selected a study path, the program associated with that selection is used.

The term in the record relates to the effective term of these program requirements. The catalog term from the student's program record (or the program's term if the catalog term is Null) is used to determine the correct version of the program requirements to process.



Note: The program requirements must be active.

When requirements are captive, all the areas should be considered when the process determines which area to use. When requirements are not captive, each area should be checked to see if it is a dynamic area. If it is a dynamic area, it is evaluated to see if the student meets the defined criteria. For more information about captive and dynamic areas, see the *Banner Student CAPP Handbook*.

SMAPROG program area attachments

Access to the program area attachments on SMAPROG is based on the student's primary program, unless the student has selected a study path. If the student has selected a study path, the program associated with that selection is used.

The term in the record relates to the effective term of these program requirements. The catalog term from the student's program record (or the program's term if the catalog term is Null) is used to determine the correct version of the program requirements to be processed.

The process determines which area pertains to the student's current registration period by using values from the GTVSDAX REGPROJSTRUCT internal code group. (See the "GTVSDAX rules" section for more information.)

- When the GTVSDAX AREASELECT rule is N, processing evaluates the area name and identifies the area to be used, based on the student's class. This setting must be used when dynamic areas are in use.
- When the GTVSDAX AREASELECT rule is P, processing evaluates the area priority which is associated with the area when it is attached to the CAPP program on SMAPROG. The order in which areas should be evaluated when a compliance report is run can also be used and mapped to a class (year in school).

SMAAREA data

Here is a summary of the area data used in structured registration processing.

- An area is associated with a program by defining the program as either captive or non-captive.
 - Programs that are defined as captive must have their associated areas physically attached. This is done by listing the areas in the Program Areas Attachment information of SMAPROG.
 - Non-captive programs can have either their associated areas physically attached or their areas dynamically accessed by the program, based on matching the characteristics attached to the area with the characteristics that belong to the student.

For more information on the difference between captive programs and dynamic areas, see the *Banner Student CAPP Handbook*.

- The area header contains the area, term, catalog term, student level, and course level. This data is accessed from the area identified from the program area attachments and indicates whether the course or group path should be used in structured registration.
- The area course/attribute attachment data used in processing includes: set, subset, rule, subject, course numbers low and high, course attributes, required credits and courses, maximum credits and courses, campus, college, and department.
- The area course/attribute attachment rule data used in processing includes: required number of conditions, required credits per condition, required courses per condition, maximum credits per condition, and maximum courses per condition.
- The area group attachment is used to associate a set, subset, and group rule with a group.
- The area group attachment rule is used to define the conditions for the group rule. Data includes: required number of conditions, condition, set, subset, rule, and group.

Area requirement types

Structured registration provides the ability to define up to three types of requirements within a program area. The types are mandatory, optional and elective. Each type is differentiated by creating the detail requirements under rules defined at the area level. Each type is assigned an arbitrary name which is used as a standard for all areas. The association of the rule name used for each type is then set up on SOATERM. For the type

designated as mandatory, besides having the detail requirements stored under a rule, the detail requirements can also exist attached directly to the area.

Generally, mandatory courses are those which are required based on the student's program and year in the school. Mandatory courses cannot be dropped or changed in structured registration. However, sections can be added and dropped. Courses can be designated as mandatory on SMAAREA without including them in an area rule. Mandatory courses are single course requirements attached directly to an area or attached to an area as a rule or group in CAPP.

Optional and elective courses can be selected from lists presented to the student. These lists of courses can contain specific courses, course ranges, or courses with specified attributes. Optional and elective courses are defined in CAPP using area level rule attachments.

Processing path

Here is a sample path for navigating through structured registration in Self-Service.

A breadcrumb trail is displayed at the top of the page, so you can see where you are in the levels of data. Use the breadcrumb trail to navigate back and forth.

1. Select Register for Classes from the Registration landing page.
2. Log in to the application.
3. Use the Select a Term page to choose a term.
 - Terms that are open for registration are listed.
 - Study paths can be selected at this point if they are available.
4. You are taken to the Register for Class page with the Structured tab displayed.
5. View the mandatory, elective, and optional requirements for registration.

Display and availability are based on the settings on SOATERM.

6. Use the **Structure Overview** button to see the high level requirements for the rule in a tree structure display.
7. Use the **View** buttons to drill down into each requirement selection area rule.
8. Use the **View Section** buttons to drill down into the sections that meet the requirement and have been pushed to the list of choices.
9. Use the **Refine** link at this level to refine your search and limit the set of returned sections.
10. Use the **Add** buttons to add the sections to the registration summary.
11. Use the **Submit** button to register for the added classes.
12. Resolve any registration errors presented in the Notification Center.
13. Access the Schedule and Options tab to modify course variables as allowed.

Set up structured registration

Do the following to set up structured registration in administrative Banner.

1. Access the Term Control Page (SOATERM).
2. Select the Term Management tab and go to the Registration Model section.
3. Select the **Structured** indicator.
4. Select the Structured Registration tab.
5. Verify the settings for structured registration controls.
 - 5.1. Define the error severity.
 - **Fatal** indicates the student must complete all registration requirements prior to exiting.
 - **Warning** indicates the student will be warned that all registration requirements have not been completed, but the student will be allowed to save what has been completed.
 - **None** indicates the student will not be stopped or warned if requirements have not been completed.
 - 5.2. Define whether registration is active for mandatory requirements.

Check the **Mandatory Active** checkbox.

If mandatory requirements are defined under the area rules, enter the name of the mandatory rule key to be retrieved from CAPP or the third party software.

The rule key is the name by which the mandatory classes are defined. If left blank, registration expects mandatory classes to be defined at the top most level of the CAPP area.

- 5.3. Define whether registration is active for optional requirements.

Check the **Optional Active** checkbox.

Enter the name of the optional rule key to be retrieved from CAPP or the third party software. The rule key is the name by which the optional classes are defined. The rule key is required.

- 5.4. Define whether registration is active for elective courses.

Check the **Elective Active** checkbox.

Enter the name of the elective rule key to be retrieved from CAPP or the third party software. The rule key is the name by which the elective classes are defined. The rule key is required.

- 5.5. Enter the information for the external API when CAPP is not in use. (See step 7.)
- 5.6. Define the print type and/or links type for information text.

- When additional text instructions have been appended to a CAPP rule and should be displayed to the student, enter the print type to be used in the **Structured Print Type** field.
 - When the rule text contains a URL that is to be displayed to the student, enter the print type to be used in the **Links Print Type** field.
6. Access GTVSDAX and set up the rules for AREASELECT and CLASS.

See the " GTVSDAX Rules" section for more information.
 7. Set up the external API if CAPP is not in use.

See the "Use external API" section for more information.
 8. Access the Program Requirements Page (SMAPROG).

Verify that the registration model used on SOATERM is defined for the program and term range.

Time-Ticketing

You can use time-ticketing to restrict students to specific time periods when they can access registration. Students can be evaluated based on a predefined set of characteristics, or they can be pre-assigned to groups. Those groups are mapped to specific registration times.

The Third Party Registration Time Controls Page (SFARGTC) provides an alternative to individually assigned time-ticketing, through the creation of term-specific registration eligibility profiles. Therefore, only those students who match the criteria for a valid time control may register at any given time. Time-ticketing is controlled by the WEBRESTTKT rule on GTVSDAX.

Here is a high level summary for individually assigned time-ticketing.

1. Define time slots and assign their priorities on the Registration Priority Control Page (SFARCTT).
2. Create group codes and associate each group with a priority on the Registration Group Control Page (SFARCTL).
3. Assign a group to a student (and therefore assign the time slots to the student) on the Student Registration Group Page (SFARGRP).
4. Review the group information and student group assignments on the Student Registration Group Query Page (SFIRGRP).

See the "Registration" chapter in the *Banner Student User Guide 8.x* for detailed information on using time ticketing with registration processing.

Structured registration controls

Use the Term Control Page (SOATERM) to set up structured registration controls.

In the Term Management tab, access the indicators in the Registration Model section to designate which type of registration processing you wish to use for the term. Choices are **Regular**, **Structured**, or **Projected**.

In the Structured Registration Controls, define the field values. These fields come from the Structured Registration Term Control Table (SOBSTRG).

Use this field to define the error severity setting for structured registration.

Fields	Descriptions
Error Severity	Radio group used to select error severity. Choices are <i>Fatal</i> , <i>Warning</i> , <i>None</i> . <ul style="list-style-type: none">• <i>Fatal</i> - Registration changes are not saved until all structured registration requirements are met.• <i>Warning</i> - Registration changes are saved. The student is warned when structured registration requirements have not been met.• <i>None</i> - Registration changes are saved. The student is not informed when structured registration requirements have not been met.

Use these fields to set up the mandatory rule.

Fields	Descriptions
Mandatory Active	Check box used to indicate whether the mandatory requirements are presented to the student in Self-Service registration.
Mandatory Rule Key	Defines the rule under which mandatory requirements are found. Enter a key such as <i>MANDATORY</i> . When this field is blank, the mandatory requirements attached directly to the area are used.

Use these fields to set up the optional rule.

Fields	Descriptions
Optional Active	Check box used to indicate whether the optional requirements are presented to the student in Self-Service registration.
Optional Rule Key	Defines the rule under which optional requirements are found. Enter a key such as <i>OPTIONAL</i> . When this field is blank, the optional rule cannot be active.

Use these fields to set up the elective rule.

Fields	Descriptions
Elective Active	Check box used to indicate whether the elective requirements are presented to the student in Self-Service registration.
Elective Rule Key	Defines the rule under which elective requirements are found. Enter a key such as <code>ELECTIVE</code> . When this field is blank, the elective rule cannot be active.

Use this field to set up the external API.

Fields	Descriptions
External API	Name of the external API used for processing when CAPP is not in use.

Use these fields to set up the information text.

Fields	Descriptions
Structured Print Type	Print type code and description used for structured registration information text to be displayed in Self-Service. Select a value from the list of print type choices.
Links Print Type	Print type code and description used for display of links/URLs in structured registration. Select a value from the list of print type choices.

GTVSDAX rules

Rules on GTVSDAX with the internal code group of `REGPROJSTRUCT` are used for structured registration processing.

AREASELECT rule

Use the `AREASELECT` rule to determine whether to use the name convention for the area or the area priority. Area order is based on the student's year in school. Values are `P` - Priority, `N` - Name, or `A` - All. The default is `P`.

CLASS rule

Use the CLASS rule to select the class to be processed (such as first year, second year, and so on) and mapped to an area. Multiple CLASS rules can be created.

- When the AREASELECT rule is set to N, the name area of the class code found at the end of the area name is used.

The CLASS rule can have numerical or alphabetical codes. However, that code must be used as the student's class code, and the area assigned to the student's program on SMAPROG must end with the same code.

- When the AREASELECT rule is set to P, the area priority is matched to the sequence number of the student's class code entered for the CLASS rule.

The CLASS rule must have a sequence number of 1, 2, 3, or 4. The system looks for an area associated with the student's program on SMAPROG that has a priority value equal to the GTVSDAX sequence number of the CLASS record with an external code equal to the student's class code.

Rule summary

The table below shows sample seed data rules. Please note that the external code for the class code can be any valid class code. It does not have to be numeric. Also, the sequence number does not necessarily correspond to the class year, such as sequence 1 does not have to correspond to 1st year class. Sequence number 1 maps to the area with priority of 1 on SMAPROG. Sequence number 2 maps to the area with priority 2 on SMAPROG, and so on. Therefore, a class code of SR could be mapped to sequence number 1 if you choose to do so.

External Code	Internal Code	Internal Code Sequence Number	Internal Code Group	Description
P, N, A Default is P	AREASELECT		REGPROJSTRUCT	Use name convention or priority. P = Priority, N = Name, A = All
01	CLASS	1	REGPROJSTRUCT	1st year class
02	CLASS	2	REGPROJSTRUCT	2nd year class
03	CLASS	3	REGPROJSTRUCT	3rd year class
04	CLASS	4	REGPROJSTRUCT	4th year class

Area name and selection of CAPP areas

When you wish to use the area name to select CAPP areas for a student's program, the following GTVSDAX rules must exist.

External Code	Internal Code	Internal Code Group
N	AREASELECT	REGPROJSTRUCT
Student's class code as displayed on SGASTDN	CLASS	REGPROJSTRUCT

When this combination of GTVSDAX rules exists and an area name associated with the student's program on SMAPROG ends with the class code value, the requirements associated with that area are displayed in structured registration. For structured registration, only the primary curriculum program is selected. If study paths are used, the current and active curriculum record per study path is selected.

Example

A student's class code is 01. When a GTVSDAX record exists with the internal code of CLASS, the internal code group of REGPROJSTRUCT, and the external code of 01, and an area assigned to the student's program on SMAPROG has a name that ends with 01, the requirements associated with that area are displayed in structured registration.

Example

A student's class code is FR. When a GTVSDAX record exists with an internal code of CLASS, an internal code group of REGPROJSTRUCT, an external code of FR, and an area assigned to the student's program on SMAPROG has a name that ends with FR, the requirements associated with that area are displayed in structured registration.

Area priority and selection of CAPP areas

When you wish to use the area priority to select CAPP areas for a student's program, the following GTVSDAX rules must exist.

External Code	Internal Code	Internal Code Sequence Number	Internal Code Group
P	AREASELECT		REGPROJSTRUCT
Student's class code as displayed on SGASTDN	CLASS	1, 2, 3, or 4	REGPROJSTRUCT

The GTVSDAX CLASS rule with sequence number of 1 is mapped to the area on SMAPROG with the area priority of 1. The external code in this record can be any valid class value (such as 01, FR, SO, 03, etc.). When the external code is equal to the student's class value, the area on SMAPROG with a priority of 1 is used for the structured registration requirements.

Example

When the CLASS rule has an external code of FR with a sequence number of 1, the requirements for the SMAPROG area with a priority of 1 will be displayed for a student with the class code of FR. When the external code is 03 with a sequence number of 1, the requirements for the SMAPROG area with a priority of 1 will be displayed for a student with a class code of 03.

Example

The CLASS record with a sequence number of 2 is mapped to an external code of 03. In this case, an area on SMAPROG with the area priority of 2 will be used for students with a classification of 03.

All area requirements

When you wish to use requirements for all areas associated with the student's program, the following GTVSDAX rules must exist.

External Code	Internal Code	Internal Code Group
A	AREASELECT	REGPROJSTRUCT

In this case, all requirements from all areas associated with the student's program will be displayed to the student, regardless of the area name, the priority of the area on SMAPROG, and the student's class. The specific requirements displayed are determined by the SOATERM settings for mandatory requirements, optional requirements, and electives.

Example

Here is an example where the GTVSDAX AREASELECT rule is set to A, and the student's CAPP program definition contains three areas.

Program Area	Rules	Requirement Type
GEN-ED	2 rules attached	MANDATORY, ELECTIVE
MAJOR	2 rules attached	MANDATORY, OPTIONAL
ENGL-ELEC	1 rule attached	ELECTIVE

When the SOATERM settings for structured registration are set with **Mandatory Active** checked and **Optional Active** checked, the student would see all of the mandatory requirements from GEN-ED and MAJOR along with the optional requirements from MAJOR. The student would not see the electives from GEN-ED and ENGL-ELEC.

When the SOATERM settings for structured registration are set with **Elective Active** checked, the student would see all of the elective requirements from MAJOR and ENGL-ELEC. The student would not see the mandatory or optional requirements from MAJOR.

Refine Search

A Refine Search option is provided to manage the number of sections presented to the user. CAPP supports single course numbers, course number ranges, attributes, and various characteristics, any which of can result in large numbers of sections being listed. Structured registration uses the Basic Search page layout in Self-Service when the **Refine** link is selected. Processing does not support the expansion to the Advanced Search. The Basic Search and the Refine Search display share the same SOAWSCR configuration entries.

When the Refine Search option is configured for display, all the fields the student can use must be included on a single page. It is recommended that only the low and high course range fields are displayed and not the **Course Number** field. When either the **Course Number Low** value or the **Course Number High** value from CAPP exists, all **Course Number** fields on the Refine Search page will be protected from update.

When both the **Course Number Low** and the **Course Number High** values are populated in CAPP, the **Course Number** field on the Refine Search page is Null. The **Course Number Low** from CAPP populates the low **Course Number Range** field, and the **Course Number High** from CAPP populates the high **Course Number Range** field.

Structured Overview display

When using structured registration in Self-Service, a breadcrumb trail is presented at the top of the page to show which level of information is being displayed. As you navigate to each new level of data, that new level is added to the breadcrumb trail. A sample breadcrumb trail could be: *Top > Elective > Elective Classes for Year 1 > Select from the attached 9 requirements*. When the Refine Search option is used, a sample breadcrumb trail could be: *Top > Elective > Elective Classes for Year 1 > Select from the attached 9 requirements > Search Results*.

You can also access the Structured Overview display using the **Structured Overview** button from any level of requirements data on the Structured tab. This view displays a hierarchy of requirements that can be reviewed without drilling down through the levels of data using the breadcrumb trail. This view provides a visual display of requirements that have been met (green check mark), and /or still need to be met (gray check mark), based on mandatory, optional, or elective areas.

Use external API

Structured registration processing can request data from external third party applications and receive a list of courses to be processed in Banner. This is done by setting up an external API when CAPP is not in use.

Configure the external API

Do the following to set up the external API used to retrieve structured registration data from a third party application.

1. Create a new record for the external RESTful API code and description on the External API Information Validation Page (STVREST).

For example, SRG - Third Party Connection for Structured Registration

This code is used in step 2.

2. Define the RESTful API controls on the External API Connection Information Page (SOAREST).
 - 2.1. Select the code created on STVREST.
 - 2.2. Enter the username, password, and URL information used to connect to your third party APIs.
3. Update the RESTful API code on SOATERM.

This step tells your registration process how to collect structured registration data.

- 3.1. Enter the term you wish to use.
- 3.2. Select the Structured Registration tab.
- 3.3. Enter the external API using the code defined on STVREST.
- 3.4. Save the changes.

Use third party service

The third party service needs to send all processed data in the proper hierarchy for rules and rules under rules. If AND/OR conditions exist for requirements, the third party service should group them accordingly.

The following minimum requirements must be met by your third party service provider.

URL

Your third party service should be exposed as a RESTful Service on the URL accessible by the Banner 9.x application.

Authentication

External API access requires Base64 encoding of the username and password. The third party service is expected to authenticate all incoming requests with the Base64 encoded username and password. The response is returned when the data is successfully validated, based on the credentials entered in SOAREST.

Request criteria

The Banner 9.x application will provide following criteria for the RESTful request.

Response Field	Field Attribute	Description
bannerId	String (9 char)	Student's ID, required.
term	String (6 char)	Student's term, required.

Response

A JSON type of response is expected from the third party service. The Banner 9.x application will request "application/json" as the acceptToken in the request.

The response should contain hierarchical information about structured registration data. The response contains one or more headers, and each header can contain hierarchical subRules.

Header JSON

Here is the header JSON information for criteria field, field attribute, and description.

Criteria Field	Field Attribute	Description
bannerId	String (9 char)	Student's ID, required.
termCode	String (6 char)	Student's term, required.
Program	String (12 char)	Student's program code - required.
programDescription	String (30 char)	Program description.
studyPath	Number (2) 0 - 99	Key sequence of the study path for the structured registration header record.
catalogTerm	String (6 char)	Catalog term code of the learner.
typeCode	String (1 char) ["1", "2", "3"]	The type value corresponding to the ACTIVE_IND for the term. Valid values are: 1 - Mandatory Active, 2 - Optional Active, 3 - Elective Active.

Criteria Field	Field Attribute	Description
subRules	List <Rule>	Sub rules represent a list of rules that are children of the current rule. This field provides hierarchical capabilities to the structured registration data.

Rule JSON

Here is the rule JSON information for response field, field attribute, and description.

Response Field	Field Attribute	Description
bannerId	String (9 char)	Student's ID, required.
termCode	String (6 char)	Student's term, required.
area	String (10 char)	Entity used to define general requirements and any related detail requirements for use as a program component - required.
areaDescription	String (30 char)	Description for area of study.
set	String (3 char)	Used to associate individual rules and provide AND and OR groupings. Refer to the <i>Banner Student CAPP Handbook</i> for details.
subset	Number (3) 0-999	Defines the relationship of the rules denoted by the associated set. When the subset is specified, the set must also be specified.
groupName	String (30 char)	Name of the group associated with the requirement.
ruleName	String (10 char)	Used to segregate detail requirements which need additional controls over and above the controls already specified for the area detail requirements.
ruleDescription	String (30 char)	Description for the rule.
ruleCondition	Number (3) 0-999	When the type of rule is a condition, this is the number of the condition.

Response Field	Field Attribute	Description
ruleRequiredNumber Condition	Number (3) 0-999	Required number of conditions that must be met. Applicable for rule requirements only.
ruleCondition RequiredCredits	Decimal (8,3) 0.000 - 99999999.999	Required number of credits per condition.
ruleCondition RequiredConnector	String (1 char) [A,O,N]	Used to designate whether overall credits and overall courses should be considered together or individually as a requirement. Connector can be And, Or, None, or Null.
ruleCondition RequiredCourses	Number (3) 0-999	Required number of courses per condition.
ruleConditionMax Credits	Decimal (8,3) 0.000 - 99999999.999	Maximum number of credits per condition.
ruleConditionMax Connector	String (1 char) [A,O,N]	Used to designate whether maximum credits and maximum courses should be considered together or individually as a requirement. Connector can be And, Or, None, or Null.
ruleConditionMax Courses	Number (3) 0-999	Maximum number of courses per condition.
ruleTotalRequired Credits	Decimal (8,3) 0.000 - 99999999.999	Required number of total credits for the rule.
ruleTotalRequired Connector	String (1 char) [A,O,N]	Used to designate whether overall credits and overall courses should be considered together or individually as a requirement. Connector can be And, Or, None, or Null.
ruleTotalRequired Courses	Number (3) 0-999	Required number of total courses for the rule.
ruleTotalMaximum Credits	Decimal (8,3) 0.000 - 99999999.999	Maximum total credits that can be taken for the rule.

Response Field	Field Attribute	Description
ruleTotalMaximum Connector	String (1 char) [A,O,N]	Used to designate whether maximum credits and maximum courses should be considered together or individually as a requirement. Connector can be And, Or, None, or Null.
ruleTotalMaximum Courses	Number (3) 0-999	Maximum total number of courses that can be taken for the rule.
courseRequired Credits	Decimal (8,3) 0.000 - 99999999.999	Required number of credits for the course requirement. Applicable to course only.
courseRequired Connector	String (1 char) [A,O,N]	Required courses/credits connector used to designate whether overall credits and overall courses should be considered together or individually as a requirement. Connector can be And, Or, None, or Null. Applicable to course requirement only.
courseRequired Courses	Number (3) 0-999	Number of courses required for the course requirement.
courseMaxCredits	Decimal (8,3) 0.000 - 99999999.999	Maximum number of credits for the course requirement.
courseMaxConnector	String (1 char) [A,O,N]	Maximum courses/credits connector used to designate whether overall credits and overall courses should be considered together or individually as a requirement. Connector can be And, Or, None, or Null. Applicable for course requirement only.
courseMaxCourses	Number (3) 0-999	Maximum number of courses required by the course requirement.
subject	String (4 char)	Subject code.
courseNumberLow	String (5 char)	Course number low. The subject and course number low should refer to an existing section.

Response Field	Field Attribute	Description
courseNumberHigh	String (5 char)	Course number high. If course number low and course number high are both populated, then a range is indicated. Course number high cannot exist without course number low.
courseAttribute Code	String (4 char)	Attribute code for the course/rule. The attribute code must exist in Banner 9.x.
campusCode	String (3 char)	Campus code for the course/rule. The campus code must exist in Banner 9.x.
collegeCode	String (2 char)	College code for the course/rule. The college code must exist in Banner 9.x.
departmentCode	String (4 char)	Department code for the course/rule. The department code must exist in Banner 9.x.
source	String (30 char)	Identifies the source of data for ruleLink and informationText fields.
ruleLink	String (2000 char)	URL presented to the student to prompt for more information.
informationText	CLOB	When multiple informational text items exist for the requirement, all items should be concatenated into a single string.
subRules	List <Rule>	Represents list of rules that are children of the current rule. This field provides hierarchical capabilities for the structured registration data.

Projected Registration

This chapter details the setup and processing for projected registration.

Overview

In Banner Student Registration, the term "projected registration" refers to a registration model where a projected list of courses is generated. The projections allow an institution to produce a list of courses for which students are expected to register and therefore plan for the anticipated number of students per course. In Self-Service, students can use the projected list as a registration guide or as specific instructions when the list is limited to the courses for which a student must register.

The course projection list is based on CAPP compliance results for program requirements and area priority. As program requirements can be restrictive (courses can only be selected from the program or curriculum, and courses must be taken in a specific order), an institution can try to predict which courses a student will take in the next term and perform schedule planning accordingly.

A batch process is used to create the projected courses list. Filters are used to determine the number of areas to be considered in the projections. Courses are marked as most probable, that is they are the most likely to be registered for in the next term. This is based on course credit limits and course attributes. Elective courses can also be identified and categorized for the students. Courses in CAPP that are "not-met" or not completed are included in the list of projected courses. First course rules can be applied to filter courses by department, college, and subject. Prerequisite checking and corequisite checking are used to further refine the list of courses.

Please see the *Banner Student CAPP Handbook* for more information on setting up and using CAPP.



Note: It is assumed that CAPP is in use at your institution. If it is not in use, please refer to the "Use external API" section to set up processing with the third party system that will provide data for use with projected registration.

Comparison of projected and structured

Projected registration and structured registration are similar but different. Here is a quick summary of the differences.

Projected registration works as follows:

- The focus is on what has yet to be completed, based on what has already occurred in the past.

- No validation of how coursework will satisfy specific program requirements is performed.
- Courses are presented to the student in a practical order based on prior coursework and the organization of requirements in CAPP.
- The course presentation is flexible, as to how much is shown to the student at one time.
- A course that is identified as mandatory is one that is required for the degree but is not required for the current registration period.
- Students can select courses from the projected list based on what they perceive as best for them.

Structured registration works as follows:

- The focus is on the student's current stage or classification and what coursework is required based on the student's academic program.
- Coursework is based on the categories (mandatory, optional, and electives) that make up the requirements of the current registration period.
- The focus is on subject matter for courses that are closely related to the student's area of study.
- Each year of coursework is regimented, strictly organized, and controlled.
- A mandatory course is a course that must be taken in the current registration period.
- Students are guided through each registration period.
- Students are directed as to what courses they must take, and they cannot deviate from the structured requirements.
- Validation of selected coursework against specific program requirements is performed.

Processing

This section contains information about setting up and using projected registration. In summary:

- The following Banner Student 8.x administrative forms are used with projected registration.
 - Projection Configuration by Program Form (SFALPRO)
 - Projection Maintenance Form (SFAPROJ)
- The Term Control Page (SOATERM) contains controls used to set up projected registration.

The following tables are used specifically with Banner Student 9.x projected registration.

- Projected Registration Configuration by Program Table (SFRPCFG)
- Projected Registration First Courses Table (SFRPFCR)

- Projected Registration Most Probable Attribute Table (SFRPMPA)
- Student/Term Projections Table (SFRREGP)
- Projected Registration Term Control Table (SOBPROJ)
- The following Banner 8.x report and process are used with projected registration.
 - Student Projection Process (SFPPROJ)
 - Schedule Planning Report (SFRPRES)
- The Projections tab Banner Student Self-Service is used for projected registration.

Programs, areas, and compliance

Use the following Banner 8.x pages to set up CAPP.

Page	Action
Program Definitions Rules Page (SMAPRLE)	Set up CAPP program requirements.
Area Library Page (SMAALIB)	Define areas.
Area Requirements Page (SMAAREA)	Set up area requirements.
Group Requirements Page (SMAGROP)	Associate areas with programs.
Group Requirements Page (SMAGROP)	Define the area priority.

CAPP requirements are as follows for projected registration.

- All programs have defined requirements and attached areas.
- One area is defined for each program term.
- Program areas are organized in chronological order.
- The area priority defined on SMAPROG for the program indicates the order in which the student should register for the set of courses in the area.
- Area priorities are defined in sequences of 10, such as 10, 20, 30, and so on.
- Area names can also be used to identify the sequence in which the area courses should be taken. In this case, the ending characters of the area name are matched to the student's class code to identify the sequence.

The AREASELECT rule in GTVSDAX specifies the mode used to identify the area sequence. When the AREASELECT rule is set to P in GTVSDAX then the following occurs.

- For captive programs, the projection process associates a priority of 99 with the areas on SMAPROG, when no priority has been associated with the areas.

- For non-captive programs, the projection process associates a priority of 99 with the areas on SMAPROG, as well as for areas considered from the area library based on matching area qualifiers. Priorities defined on SMAAREA are also considered.
- Rules are used to define elective courses, as not all elective options should be considered as most probable, and elective courses must be listed under a rule.

If a global or generic course needs to be marked as most probable where an elective course is considered in the projection, this is called the "global elective". To identify the global elective, the rule must have the same code as the subject and course number of the global elective course.

- CAPP compliance must be run for all students for the current program on the student record.
 - Compliance is run for the primary curriculum program when the study path is not active.
 - Compliance is run for all active programs from the student curriculum when the study path is active.
- In progress courses must be included in compliance.



Warning! *Projected registration will not work properly if areas have attached groups.*

Data used from compliance

Projected registration processing retrieves compliance data related to coursework that is marked incomplete for a student's program. However, not all data from incomplete coursework in compliance is carried over when the corresponding projection records are created. Boolean data such as sets, subsets, and conditions in CAPP rules is not considered when the projection process reads data from compliance. Only data related to the program, associated areas, area priorities, and student level is stored in the corresponding projected registration records. Course-related data such as subject, course number, attributes, and so on, is also stored in the corresponding projected registration records.

Campus, college, and department data that is configured in CAPP rules and is also present in corresponding compliance records is processed and stored in the projected records. The data is passed as internal filter criteria when sections are listed for projected courses in Self-Service.

The following data elements are read from compliance records when projection records are processed:

- PIDM
- term code
- program code
- area code

- area description
- area priority
- subject code
- course number low
- course number high
- attribute code
- level code
- campus code
- college code
- department code

Process summary

Using projected registration involves the setup of controls and rules, as well as running processes to gather and refine the projected data. Projected controls are set up on SOATERM. Once the controls are in place, the Projection Configuration by Program Form (SFALPRO) in Banner 8.x is used to build projection rules and filters by program. Projections are then created by generating CAPP compliance and running the Student Projection Process (SFPPROJ). The projected list that is created is collected in a table. The list of courses for a student can be manually edited using the Projection Maintenance Form (SFAPROJ) in Banner 8.x. Once any edits are completed, the Schedule Planning Report (SFRPRES) is used to view the expected enrollment in each course in the projected list.

Projected registration processing identifies incomplete areas for a student, lists courses in sequence by not met status and area priority, and analyzes incomplete coursework for the area. It then generates a pretend or mock registration to eliminate not met course prerequisites and missing corequisites. This elimination is based on the parameter values in SFPPROJ.

When manual entries or changes are made to the projected list, and compliance and SFPPROJ are run again, the manual changes are retained and are not overridden. Only the system-generated entries are updated.

Once projections have been created, the student can register for courses on the list. If a course is not selected for registration, the process will move it to the projected list for the next semester.

The following packages are used to process projected registration.

- SFKRGPJ/SFKRGPJ1

This package is used to collect and process registration projections. Procedures are used to collect unmet courses from compliance, filter records based on projection configurations, and build projected registration courses.

- SFKRPRJ/SFKRPRJ1

This package is used to include failed courses in projected registration processing. Procedures are used to create the projection when the student fails in the registered course.

The process accepts input parameters from the post update trigger in SFRSTCR, and checks whether the student has failed the course. If yes, the process checks if projections are available for the student. If the course is not included in the projection records, the process adds the course to the list of projected courses.

Filter by maximum areas

Projected registration uses filtering based on the area priority to determine which areas to ignore or consider for a student. The maximum number of areas to project can be set to only show the next specific areas (or semesters) for a student above the areas that have already been met, instead of showing all the areas remaining for the student ongoing. This allows the process to display the projected courses for the immediate semesters of registration. Non-met areas with lower priorities are not considered. The order in which the student must complete the area requirements is controlled by the area priority on SMAPROG.

Here is an example of using maximum areas with a program design of six semesters or terms.

Program: BA in Computer Science

Area	Priority
First Semester	10
Second Semester	20
Third Semester	30
Fourth Semester	40
Fifth Semester	50
Sixth Semester	60

Assuming the student is already registered in all the courses for the First Semester area, the projection will show all of the courses in the five remaining areas. However, you may only want to present the student projections for the next two areas or semesters and prevent the student from registering in a course from a later area such as the Sixth Semester area.

To include only the two semesters after the current registration semester, you need to define the maximum level of "2" above the latest met area. This maximum is set up on SFALPRO for each program using the **Maximum Number of Areas to Project** field. The student projection will then only present courses from the Second Semester and Third Semester areas to the student.

The projection process identifies the non-met area with the minimum priority and then considers only the next maximum priority area. For example, the non-met area with the minimum priority is the Second Semester area (priority 20). The non-met area with the maximum priority is the Third Semester area (priority 30). Because the maximum level is set to 2, only areas with the priority of 20 and 30 are considered in the projection. All areas above priority 30 are eliminated from consideration. If an area with a priority of 25 exists, that area and priority would still be included in the projection.



Note: If the program setup and area setup at your institution are different from what is suggested, and you wish to include all priorities in the projection, use a number such as 999 for the maximum number of areas.

The system logic determines the maximum priority to be included in the projection process. Priorities are assumed to be based on increments of 10 (10, 20, 30, and so on). Therefore, the maximum level is multiplied by a factor of 10. The maximum level of 2 is then converted to 20. The logic adds the maximum level to the minimum priority, and subtracts 10.

$$(20 + 20 \text{ maximum levels} - 10) = 30$$

All areas with a priority above 30 are excluded from the projection.

The factor of 10 is the default value used to compare area priorities. This can be set to "1" on GTVSDAX for the PRIADJFAC rule. Only values of 1 and 10 are valid factors. See the "GTVSDAX rules" section for more information.

Filter by student class

Student classes can be linked to program areas that are in progress for a student. This means that student classes are also related to the area priority. Therefore, the student class codes used must be numeric, such as 1, 2, 3, and so on. A class could be assigned, even when the student has non-met courses from a previously used area. That could cause the maximum number of areas rule to produce inappropriate results. Therefore, the **Maximum Number of Areas Over Student Class** field on SFALPRO defines the number of levels or area priorities for the program that are included in the projection, above the area priority determined by the student class. Processing always uses the lowest limit estimated by maximum number of levels or the maximum number of areas over student class when that maximum is used.

Here is an example where the student class code is determined by the semester in which the student is registered.

Program: BA in Computer Science

Area	Priority	Student Class Code
First Semester	10	1
Second Semester	20	2
Third Semester	30	3

Area	Priority	Student Class Code
Fourth Semester	40	4
Fifth Semester	50	5
Sixth Semester	60	6

In the previous example, the student has a class of "1 First Semester". If the **Maximum Number of Areas Over Student Class** field is set to 1, the limit is estimated by adding "1" to the class, using a factor of 10 for this value.

$$\text{Class: } 10 + \text{maximum over class} * 10 = 20$$

Only the courses with area priorities below or equal to 20 are included in the projection.

The factor of 10 is the default value used to compare area priorities. This can be set to "1" on GTVSADX for the PRIADJFAC rule, as in the maximum levels example. See the "GTVSADX rules" section for more information.

Filter by first course

Course subjects may need to be considered in projections and marked as most probable, regardless of the area priority and other defined rules. Some programs need to include the first non-met course in the projection, without considering the priority. These types of courses can be identified for each program based on a combination of department, college, and subject. The maximum number of courses is defined for each rule.

Mark course as most probable

Courses are considered as most probable based on the following criteria:

- maximum credits

A student is supposed to register for a maximum number of credits in each term. The process sorts the projected courses by area priority and marks the first courses. It then adds the number of credits for each course until the total is greater than the maximum credits per term as defined on SFALPRO.

- special attributes

Some courses are always considered as most probable based on a special attribute. The attributes are defined for the program on SFALPRO.

- first course rule

Courses considered to be first courses are included regardless of area priority.

Registration planning

Projected courses can be presented to the student when registration plans are created in Self-Service. The SOATERM projected registration settings are also applicable to registration planning.

Processing path

Here is a sample path for getting started and navigating through projected registration in Self-Service.

1. Select Register for Classes from the Registration landing page.
2. Log in to the application.
3. Use the Select a Term page to choose a term.
 - Terms that are open for registration are listed.
 - Study paths can be selected at this point if they are available.
4. You are taken to the Register for Classes - Find Classes tab.
5. Select the Projections tab.
6. Review the list of projected courses for the term.
7. Use the **View Sections** button to view existing sections or search on course sections.
8. In the Search Results, use the **Add** button to add sections to the registration summary.
9. Use the **Submit** button to submit the sections for registration.

Set up projected registration

Do the following to set up projected registration in administrative Banner.

1. Access the Term Control Page (SOATERM).
2. Select the Term Management tab and then the Registration Model section.
3. Select the **Projected** indicator.
4. Select the Projected Registration tab.
5. Verify the settings for projected registration controls.
 - 5.1. Set up restrictions.
 - Define whether the term is in use in Self-Service for projected registration.
 - Define whether registration is restricted to projected courses only.
 - Define whether registration is restricted when no projected courses are listed, and the student is required to have a projection.
 - 5.2. Set up student projections.

- Define whether failed courses are included in the projection.

This captures when a student fails a course, and the course is then added to the projected list. (This is helpful when compliance has been run with the assumption that students would pass their current classes.)

- Define whether failed courses can be marked as most probable for the projection to help forecast seat requirements for courses in the term. This does not impact registration processing.

- 5.3.** Define the value which will be used to identify mandatory courses for registration.

This will be compared against the value in the area rule description on SMAAREA.

The mandatory rule key is used when courses that are required for students to complete their degrees have been entered into CAPP area rules, and you wish to have them designated as mandatory on the projected list.

- 5.4.** Define the value which will be used to identify elective courses for registration.

This will be compared against the value in area rule description field in SMAAREA form.

The elective rule key is used when courses that are optional for students to complete their degrees have been entered into CAPP area rules, and you wish to have them designated as elective on the projected list.

- 5.5.** Enter the information for the external API when CAPP is not in use.

- 6.** Access GTVSDAX and set up the rules for AREASELECT, CLASS, and PRIADJFAC.

See the " GTVSDAX Rules" section for more information.

- 7.** Set up the external API if CAPP is not in use.

See the "Use external API" section for more information.

- 8.** Access the Program Requirements Page (SMAPROG).

Verify that the registration model used on SOATERM is defined for the program and term range.

- 9.** Set up program filtering on the Projection Configuration by Program Form (SFALPRO) in Banner 8.x.

- 9.1.** Enter the program for the rule.

- 9.2.** Set the maximum area or class and credit parameters for the rule.

- 9.3.** Set up the combinations of department, college, and subject to identify courses that can be treated as first courses.

- 9.4.** View and update the most probable attributes for the program.

- 10.** Run the Student Projection Process (SFPPROJ) in Banner 8.x to produce projection results.

11. Review and modify results on the Projection Maintenance Form (SFAPROJ) in Banner 8.x.
12. Run the Schedule Planning Report (SFRPRES) in Banner 8.x to see expected registration for courses.

Projected registration controls

Use the Term Control Page (SOATERM) to set up projected registration controls.

In the Term Management tab, access the indicators in the Registration Model section to designate which type of registration processing you wish to use for the term. Choices are **Regular**, **Structured**, or **Projected**.

In the Projected Registration Controls, set up the sets of controls fields. These fields come from the Projected Registration Term Control Table (SOBPROJ).

Use these fields to set up restrictions.

Fields	Descriptions
Term open for Self-Service Projections	Check box used to indicate whether projected registration is in use for the term.
Restrict to Projected Courses	Check box used to indicate whether registration and planning are restricted to only projected courses.
Restrict to Null Projections	Check box used to indicate whether registration and planning are restricted when no projected courses are listed.

Use these fields to define student projection settings.

Fields	Descriptions
Include Failed Courses in Student Projections	Check box used to indicate whether failed courses are included in the projections.
Mark Failed Courses as Most Probable	Check box used to indicate whether failed courses can be marked as most probable in the projections.

Use this field to set up the mandatory rule.

Fields	Descriptions
Mandatory Rule Key	Value used to identify mandatory courses. Enter a key such as MANDATORY. When this field is blank, only independent courses listed in the area requirements are considered as mandatory.

Use this field to set up the elective rule.

Fields	Descriptions
Elective Rule Key	Value used to identify elective courses. Enter a key such as ELECTIVE. When this is blank, the elective rule does not apply.

Use this field to set up the external API.

Fields	Descriptions
External API	Name of the external API used for processing registration projections when CAPP is not in use.

GTVSDAX rules

Rules on GTVSDAX with the internal code group of REGPROJSTRUCT are used with projected registration.

AREASELECT rule

Use the AREASELECT rule to determine whether to use the name convention for the area or use the area priority. Values are P - Priority, N - Name, or A - All. The default is P.



Note: The value of A is not used with projections.

- When an institute is using CAPP and has associated sequenced priorities with areas in SMAPROG based on the order in which they will be taken, the value of P should be used.
- When an institute uses area naming conventions to identify the sequence, the value of N should be used.

CLASS rule

For projections, the CLASS rule is only used when the AREASELECT rule is set to N. When the AREASELECT rule is set to N, the name of the class code found at the end of the area name is used. The CLASS rule can use numerical or alphabetical codes. However, the code must be used as the student's class code, and the area assigned to the student's program on SMAPROG must end with the same code.

PRIADJFAC rule

Use the PRIADJFAC rule to adjust the priority factor for processing. Enter 1 or 10. 10 is the default. The adjust factor is used to set the maximum area and the maximum over the class rules. The factor of 10 assumes that area priorities are numbered in increments of 10, such as 10, 20, 30, and so on. The factor of 1 assumes that area priorities are numbered in increments of 1, such as 1, 2, 3, and so on.

External Code	Internal Code	Internal Code Sequence Number	Internal Code Group	Description
P, N, A Default is P A is not used for projections	AREASELECT		REGPROJSTRUCT	Use name convention or priority. P = Priority, N = Name, A = All A is not used for projections
01	CLASS	1	REGPROJSTRUCT	1st year class
02	CLASS	2	REGPROJSTRUCT	2nd year class
03	CLASS	3	REGPROJSTRUCT	3rd year class
04	CLASS	4	REGPROJSTRUCT	4th year class
1, 10 Default is 10	PRIADJFAC		REGPROJSTRUCT	Priority adjust factor 1 or 10

Use External API

Projected registration processing can request data from external third party applications and receive a list of projected courses to be processed in Banner. This is done by setting up an external API when CAPP is not in use.

Configure the external API

Do the following to set up the external API used to retrieve projected registration data from the third party application.

1. Create a new record for the external RESTful API code and description on the External API Information Validation Page (STVREST).

For example, PRG - Third Party Connection for Projected Registration

This code is used in step 2.

2. Define the RESTful API controls on the External API Connection Information Page (SOAREST).
 - 2.1. Select the code created on STVREST.
 - 2.2. Enter the username, password, and URL information used to connect to your third party APIs.
3. Update the RESTful API code on SOATERM.

This step tells your registration process how to collect projected registration data.

- 3.1. Enter the term you wish to use.
- 3.2. Select the Projected Registration tab.
- 3.3. Enter the external API using the code defined on STVREST.
- 3.4. Save the changes.

Use third party service

The service needs to send all processed data based on the request criteria provided. The following minimum requirements must be met by your third party service provider.

URL

Your third party service should be exposed as a RESTful Service on the URL accessible by the Banner 9.x application.

Authentication

External API access requires Base64 encoding of the username and password. The third party service is expected to authenticate all incoming requests with the Base64 encoded username and password. The response is returned when the data is successfully validated, based on the credentials entered in SOAREST.

Request criteria

The Banner 9.x application will provide following criteria for the RESTful request.

Criteria Field	Field Attribute	Description
studentId	String (9 char)	Student's ID, required.
termCode	String (6 char)	Student's term, required.
program	String (12 char)	Student's program, required.

Response

A JSON type of response is expected from the third party service. The Banner 9.x application will request "application/json" as the acceptToken in the request.

JSON

Here is the JSON information for criteria field, field attribute, and description.

Criteria Field	Field Attribute	Description
studentId	String (9 char)	Student's ID, required.
term	String (6 char)	Student's term, required.
mandatoryIndicator	String (1 char) ["Y", "N"]	Mandatory Course Indicator, optional. Default is N.
Program	String (12 char)	Student's program code, required.
elective	String (1 char) ["G", "E", null]	Elective Course Indicator, optional. Valid values are: G - Generic, E - Elective, Null - Default.
subject	String (4 char)	Subject Code, optional. Default is Null.
courseNumberLow	String (5 char)	Course number low, optional. Default is Null.
courseNumberHigh	String (5 char)	Course number high, optional. Default is Null. When low and high are both populated, a range is indicated. High cannot exist without low.
attribute	String (4 char)	Attribute Code, optional. Default is Null.
level	String (2 char)	Level Code, optional. Default is Null.

Criteria Field	Field Attribute	Description
mostProbable	String (1 char) ["Y", "N", null]	Most Probable Course Indicator, optional. Default is Null.
campus	String (3 char)	Campus Code, optional. Default is Null.
college	String (2 char)	College Code, optional. Default is Null.
department	String (4 char)	Department Code, optional. Default is Null.

Sample JSON object

Here is an example of request criteria for the third party service.

```
[{
  "attribute": null,
  "campus": null,
  "college": null,
  "courseNumberHigh": null,
  "courseNumberLow": "101",
  "department": null,
  "elective": null,
  "level": "UG",
  "mandatoryIndicator": "Y",
  "mostProbable": null,
  "program": "BA_LANG",
  "studentId": "PROTEST01",
  "subject": "SPAN",
  "term": "201410"
},
{
  "attribute": null,
  "campus": null,
  "college": null,
  "courseNumberHigh": null,
  "courseNumberLow": "102",
  "department": null,
  "elective": null,
  "level": "UG",
  "mandatoryIndicator": "Y",
  "mostProbable": null,
  "program": "BA_LANG",
  "studentId": "PROTEST01",
  "subject": "ACCT",
  "term": "201410"
}
```

```
}1
```

Processing note

When the Student Projection Process (SFPPROJ) is run and data is retrieved from an external API, sometimes a delay occurs in the generation of the `.lis` and `.log` file files. In that case you will need to wait before you attempt to open those files.

This delay is caused when a connection timeout exception takes place. This exception is listed in the `.log` file. The timeout takes place when SFPPROJ cannot access the URL configured for the external API code on the SOAREST page. The batch process will try to access the URL for a specific amount of time. If it is not successful, the timeout occurs.

Administrative forms

The following Banner 8.x administrative forms are used with this functionality.

- Projection Configuration by Program Form (SFALPRO)
- Projection Maintenance Form (SFAPROJ)

These forms are only available in Banner Student 8.x. They can be accessed from the Course Projections Menu (*PROJECTIONS) on the Student Menu (*STUDENT). Refer to the *Banner Student 8.x Online Help* for information on form sections and field definitions.

Projection Configuration by Program Form (SFALPRO)

This Banner 8.x form is used to set up projection filtering by program. It contains several blocks and a secondary window.

- The program for the rule is entered in the Key block.
- The parameters used with the rule are defined in the Parameters to Define the Term's Rule block. The data can be filtered by the projection process.
- Combinations of department, college, and subject are defined in the Parameters to Define First Courses block to identify courses as first courses.

First courses are selected for projection without consideration of the limits on maximum levels or maximum areas over student classes. Only the first maximum number of courses is selected for each rule defined in this block. At least one value of department, college, or subject must be defined for each rule.

- The most probable attributes for the program are viewed and maintained in the Most Probable Attribute window.

Note for the window behavior

When the Most Probable Attribute window is accessed from the Options Menu and a new attribute code is inserted and saved, and then the user performs a Rollback and re-

enters the window from the Options Menu, the inserted attribute is not displayed. The window is re-entered in query mode, and you need to perform an Execute Query function to display the record.

When the window is accessed using Next Block, the inserted attribute is displayed.

Projection Maintenance Form (SFAPROJ)

This Banner 8.x form is used to view projection registration results for a student, term, and study path and then modify the returned list of projected courses if needed.

Reporting

The following process and report are used with projected registration.

- Student Projection Process (SFPPROJ)
- Schedule Planning Report (SFRPRES)



Note: Reports and processes must be run from job submission in Banner 8.x.

See the *Banner Student Reports and Processes Handbook 8.7* for information on parameters and output samples.

Student Projection Process (SFPPROJ)

The Student Projection Process (SFPPROJ) is a Java process used to produce projection results based on CAPP compliance information. The list of projected courses for a student is used in Self-Service registration.

This process takes CAPP compliance results, generates the list of projected courses, applies filters, verifies prerequisites and corequisites, and marks the most probable courses for registration. Students are selected and processed by ID or population selection when CAPP compliance results exist for the term. Only students that match the selected college, major, and student type are selected.

The CAPP compliance results for the primary program are used when study paths are not active. When study paths are active, CAPP compliance results are used for each active program that needs to be processed for projections. When the Curriculum parameter is set to P, only primary curriculum records are processed.

Not-met courses are identified from CAPP compliance results from each row of courses attached to areas and rules.

- When the subject and course number are specified, that course is included in the projection.

- When a subject with a range of course numbers is specified, all courses with the subject in the range of course numbers are included in the projection.
- When only the subject is specified, no courses are included in the projection, but the subject is projected.
- When a rule only includes attributes, no courses are included in the projection, but the attribute is projected.
- When a rule only includes the course number, no courses are included in the projection, but the course number is projected.
- When the rule description contains the elective rule key specified on SOATERM, courses are marked as electives in the projection. Rules are designated as elective on the Projection Maintenance Form (SFAPROJ).



Note: Lists of projected courses generated previously for the term are deleted when the process is run.

Schedule Planning Report (SFRPRES)

The Schedule Planning Report (SFRPRES) is a C process that produces a list of courses with the expected number of students to be registered in each active course in the Course Catalog. This can assist with schedule planning for the upcoming term. The numbers returned are based on the most probable courses for all available term projections. Historic enrollment data from two previous terms is included in the report, and courses are grouped by college and department.

Self-Service Registration

This section discusses the Banner Student Self-Service Registration pages.

Overview

Self-Service pages are delivered for use with Banner Student Registration. Perform the setup on the administrative pages before you use the Self-Service pages.

The following introductory pages are displayed after the user logs in to Self-Service, if the pages are set up to do so, and the user has not previously provided the requested information.

- Terms of Usage page
- Security Question and Answer page
- Update Ethnicity and Race Survey page
- Forgot PIN page - *This page is not available when CAS is in use.*

These pages are used with Self-Service registration processing.

- Registration Landing page
 - Persona Selection page - displayed based on selected path
 - Select a Term - displayed based on selected path
- Prepare for Registration
- Class Search and Registration (Blocks, Plans, Projections, Structured)
- View Registration Information
- Browse Classes - without login
- Browse Course Catalog - without login

Setup information

Please refer to the following topics at the end of this chapter for setup used with Self-Service:

- “Set up the Registration Self-Service Pages” contains information on setup needed on GTVSDAX, SOATERM, and so on to use the pages.
- “Faculty card setup” contains information on how to set up the faculty card for use with the registration pages.

Introductory pages

Here is more detail on the introductory Self-Service pages.

Terms of Usage

The Terms of Usage Page is displayed the first time you log in to Self-Service Registration and two conditions are true: the **Accepted** indicator is set to **No** on the Third Party Access Audit Page (GOATPAD), and the **Display Usage Page** indicator is checked on the Customize Web Rules Page (`twbkwrul.P_ModifyPgWebRules`) in Web Tailor. When the user selects **Continue** to accept the terms, the **Accepted** indicator is set to **Yes** on GOATPAD.

This page is the same as the Banner Web General 8.x Self-Service page, Terms of Usage (`twbkwbis.P_UsagePage`). The page details and setup can be found in the *Banner Web for General User Guide* in the “Technical Reference” chapter, under the “Terms of Usage” topic.

Security Question and Answer

The Security Question and Answer Page is displayed when you log in to Self-Service Registration and the following condition is true: the **Disable “Forgot PIN”** indicator is set to **No** on the Enterprise PIN Preferences Page (GUAPPRF). The answers to the questions are stored on the Third Party Access Audit Page (GOATPAD).

This page is similar to the Banner Web General 8.x Self-Service page, Security Question and Answer (`twbkwbis.P_SecurityQuestion`). Multiple questions are displayed on one page in 9.x, instead of answering one question per page as in 8.x. The page details and setup can be found in the *Banner Web for General User Guide* in the “Using Web General” chapter, under the “Security Questions and Answers” topic.

Update Race and Ethnicity Survey

The Update Ethnicity and Race page is displayed when you log in to Self-Service Registration and the following conditions are true: the **Reporting Date** value is set for the `RESTARTDAT` and `REENDDATE` GTVSDAX rules, and the system date falls within that range. You can click **Ask Me Later** to continue and bypass the page.

The page will be displayed each time the user logs in during the date range until the survey is completed. The survey confirmation is displayed on the General Person Identification Page (SPAIDEN) with the **Ethnicity and Race Confirmed** indicator checked and the **Confirmed Date** field populated.

This page is the same as the Banner Web General 8.x Self-Service page, Update Ethnicity and Race Survey (`bwgkomre.P_RaceSurvey`). The page details and the GTVSDAX setup can be found in the *Banner Web for General User Guide* in the “Technical Reference” chapter, under the “Ethnicity and Race Survey Pages” topic.

External Code	Internal Code	Internal Code Group	Description	Reporting Date
NOT USED	RESTARTDAT	SSMREDATE	Race/Ethn Survey Start Date	First date the survey is to be displayed on the web
NOT USED	REENDDATE	SSMREDATE	Race/Ethn Survey End Date	Last date the survey is to be displayed on the web

Forgot Password and Reset Password

This page is available when CAS is not in use.

The Forgot Password and Reset Password pages can be used to assist with logging in when a student has forgotten his or her password/PIN or when the password/PIN has expired. The user-supplied security questions and answers are used to allow a password to be reset. The **Forgot Password** option is displayed as a link on the Login page.

Users can do the following to reset a password.

1. The student enters the Banner ID in the **User ID** field, then selects the **Forgot Password** link.
The system displays the Forgot Password page with the student's user name and security questions displayed.
2. The student enters the answers to the security questions in the **Answer** fields, and then selects the **Continue** button.
The system displays the Reset Password page for the student to reset his or her PIN.
3. The student enters the new password in the **New Password** field, then reenters the same password in the **Re-enter New Password** field.
4. The student selects the **Submit** button.
The system displays the Login page.

This page is similar to the Banner Web General 8.x Self-Service page, Change PIN (`twbkwbis.P_ChangePin`). The details for this page can be found in the *Banner Web for General User Guide* in the "Using Web General" chapter, under the "Resetting Your PIN" topic.

Forgot PIN and Security Question interaction

When a Banner Self-Service user creates his/her own security questions and tries to reset the PIN on a Banner 9.x Self-Service page, the following error can occur: *Security question and answers need to be defined*. This occurs when Banner Student Registration 9.x is deployed as a stand-alone application with native authentication.

When Banner Student Registration 9.x is deployed with Banner Student 8.x Self-Service, the user is able to reset the PIN from an 8.x Self-Service page.

When Banner Student Registration 9.x is configured to use CAS authentication, the reset PIN functionality should not be enabled, as it is not currently supported.

Registration pages

This section describes the pages and paths used to perform registration.

Registration Landing Page

When a user logs in to Banner Student Self-Service Registration, he/she is taken to the Registration Landing page where a list of options is displayed.

- Browse Course Catalog

Use this link to search on and browse through courses in the course catalog for potential registration or about which more information is needed. It is not necessary to log in to use this link.

The path is as follows:

- Select a Term
 - Browse Courses
 - Search Results
- Prepare for Registration

Use this link to view the registration status for a student, update student term data, and complete pre-registration requirements.

The path is as follows:

- Select a Term
 - Registration Status
 - Update Student Term Data
- Plan Ahead

Use this link to create and manage student registration plans. The plans can be saved in the Plan Ahead path and then later used for registration in the Register for Classes path.

In the Plan Ahead path, student registration plans can be created using the Browse Courses and Find Classes searches. View Sections can be used to select course sections. In the Degree Works tab, Degree Works plans can also be used to add courses or classes to the student registration plans when third party planning is in use.

Depending on whether different personas (faculty, advisors, and so on) have access to create plans for students, the Plans Created by Others tab is also available for creating student registration plans.

The Plan Ahead path is as follows for any login ID:

- Select a Term

A non-student is required to enter a student ID and meet security credentials.

- Select a Plan - create, edit, or delete student registration plans, and list Degree Works plans
- Find Classes - use search criteria to add courses or classes to the student registration plan summary
- Plans Created by Others - use plans created by IDs other than the login ID to add courses or classes to the student registration plan summary
- Degree Works Plans - use the Degree Works SEPs to add courses or view sections to add classes from Degree Works plans to the student registration plan summary

- Register for Classes

Use this link to search for and register in classes. The user can also view and manage the class schedule. When this link is selected, the user is prompted to log in to continue.

The path is as follows:

- Select a Term
- Register for Classes
 - Find Classes
 - Enter CRNs
 - Plans
 - Blocks
 - Projections
 - Structured
 - Schedule and Options

- View Registration Information

Use this link to view student schedules and ungraded classes.

The path is as follows:

- Look up a Schedule
- Active Registrations
- Schedule by Centric Period

- Browse Classes

Use this link to search on and browse through class sections for potential registration or

about which more information is needed. It is not necessary to log in to use this link.

The path is as follows:

- Select a Term
- Browse Classes
- Search Results

The faculty card is available from the following paths:

- Register for Classes
- Plan Ahead
- View Registration Information
- Browse Classes (sections)
- Browse Course Catalog

Refer to the "Faculty Card" and "Faculty Card setup" topics for more information on using this card.

Persona Selection page

When you log in to Banner Student Self-Service Registration and multiple personas are in use for your account, you are taken to the Persona Selection page. The roles available for your user ID are displayed. Persona choices include: Student, Registrar, Faculty, Advisor, and Faculty and Advisor. You can choose one, click **OK**, and continue to the Registration Landing page. If your login ID has only one persona, you are not given this choice, and the persona functionality becomes transparent. This situation will apply to most students and faculty members, as they are only set up as a STUDENT persona or a FACULTY persona.

If you are eligible, you can switch your persona at any time during your session from the Registration Landing page. The selected persona is displayed at the top of the page, to the left of the username. If you have multiple personas, and the persona in use does not have access to a specific page you are trying to view, you are prompted to change your role to continue. If you return to the Registration Landing page and you have multiple personas, the displayed persona becomes a link. Select the link to access the Persona Selection page and change your persona.

Select a Term

Use this page to select a term or date range for which you wish to perform a task. You can select a term for a class or course search, to proceed with registration, or to work with registration plans. Use the **Continue** button to move to the next page.

When you search on and register in a date range, changes to the registration status (registered, dropped, withdrawn and so on) and updates to classes are performed within the term flow, the same as in Banner 8.x. Date ranges return terms that are open for

registration within the specified dates. The SOBTERM rules from the maximum effective term are applied to all terms in the date range search. Date ranges are only available for the STUDENT persona type code.



Note: When a term date range is used (where start and end dates include multiple terms), the rules defined for the last term in the date range are used to process error messaging for the student.

The SVQ_TERM_REGISTRATION view presents the terms that are open for registration. This includes the WEBTRMDTE rule on GTVSDAX used to display term dates in the description.

This set of fields is displayed for the class search for registration.

Fields	Descriptions
How would you like to search?	Radio group used to select search for a term or a date range. Choices are: Term or Date Range. STUDENT persona only.
Terms Open for Registration	Displayed when Term is selected for the search. Select a term from the list of available terms. STUDENT persona only
Start Date	Displayed when Date Range is selected for the search. Enter the start date of the course. STUDENT persona only
End Date	Displayed when Date Range is selected for the search. Enter the end date of the course. STUDENT persona only
Study Path	<p>Study path for registration. Displayed when Term is selected for the search. Select a valid study path value from the list.</p> <p>When a term is selected that does not have a study path associated with it, this field defaults to None.</p> <p>When study paths are required, you must select one to continue with registration. When study paths are optional, you can select one or select None to continue.</p> <p>This field is not displayed if study paths are not enabled for the term.</p>
Holds Password.	Password from SOATERM used to override holds that prevent registration. This field is for registrar use only.

Fields	Descriptions
Alternate PIN	<p>Alternate PIN for the user. Displayed when Term is selected for the search. STUDENT persona only</p> <p>The field is displayed but is disabled if an SPAAPIN record is not assigned to the ID. The field is active and required when a record is assigned to the ID on the Alternate Personal Identification Number Page (SPAAPIN).</p>

Name and ID Search

Users who are administrators and faculty members or advisors can search on student names and Banner IDs for a term on the Select a Term page in Self-Service. This allows the user to perform a quick search on a student for a term without leaving the page and then continue with registration. The search criteria displays changes depending on the user's persona type code, such as REGISTRAR, FACULTY, ADVISOR, or FACULTY AND ADVISOR.

The registrar or administrator can enter a partial ID and view a list of results. The registrar can then change the term for the student, change the study path for the student, or change both and proceed with registration. The user who is either a faculty member, an advisor, or both, can also enter a partial ID and view a list of results.

The faculty member or advisor may be limited to searching for their assigned students or advisees. The ALLADV, ALLFAC, and REGADVISEE GTVSDAX rules for the FACWEB internal code group control whether the faculty member or advisor can search beyond their classes or advisees. The faculty member or advisor must enter the student's password to access the Self-Service registration pages.

A user with the REGISTRAR persona type code can use the student's ID to access student-related pages and change the term for the student, change the study path for the student, or change both and then proceed with registration. A password is required for a user who has a persona type code of FACULTY, ADVISOR, or FACULTY AND ADVISOR, in order to access student information. The user can then perform actions on a student's record such as adding or dropping classes. However, an advisor may have limited access and permissions based on your policies.

Once you have selected a student from the search results and viewed the registration summary information on the Find Classes page, you can click on **New Search** at the top of the page. This returns you to the Select a Term page, where you can perform a search on another student. The term you were using is defaulted into the page.

Confidential and Deceased notifications

When a user searches on and selects a student, the *CONFIDENTIAL* and *DECEASED* notifications are displayed, based on the settings on SPAPERS.

The REGISTRAR persona (administrative) can view and process information for a student who is marked as *CONFIDENTIAL* or *DECEASED*. The notifications are displayed next to the student's name on the Self-Service pages.

The FACULTY, ADVISOR, or FACULTY AND ADVISOR personas can also view and process information for a student who is marked as *CONFIDENTIAL*. However, these personas cannot process a student marked as *DECEASED* or advance to another Self-Service page.

When the FACULTY, ADVISOR, or FACULTY AND ADVISOR personas select a student marked as both *CONFIDENTIAL* and *DECEASED*, the *DECEASED* notification takes precedence. Only the *DECEASED* notification is displayed, and the following message is displayed: *You cannot process this student at this time. Please contact the student records department.*

The FACADVSESEARCHDECEASED rule on the Information Text Editor Page (GUAINFO) contains the text used for the *DECEASED* notification message. This text can be re-configured at your institution.

Field display by persona

Here are the fields the user with the REGISTRAR persona type code can use for a student search.

Fields	Descriptions
Search by	Radio group used to search on a student by ID or name for the term. Values are ID, Name.
Untitled (Search Criteria)	Field used to enter the ID or name search criteria. <ul style="list-style-type: none"> • For an ID, enter at least four characters. • For a name, enter data in the format last name, first name or initial, such as Jones , M.
Untitled (Results)	Displays list of students returned for the search by name and ID. You can select a student from the list and continue. Alternate student names are presented in the results. Third party IDs are not included at this time.

Here are the fields the user with the FACULTY, ADVISOR, or FACULTY AND ADVISOR persona type codes can use for student searches.

Fields	Descriptions
Search by	Radio group used to search on a student by ID or name for the term. Values are ID, Name. When Name is selected, the Search On field is displayed to the left of the Search by radio group.

Fields	Descriptions
Search on	Field that displays a specific type of name search based on the persona in use. Select the value that applies to your persona. <ul style="list-style-type: none"> • For Advisor, you can search on <i>All Students</i> or <i>My Advisees</i>. • For Faculty, you can search on <i>All Students</i> or <i>My Students</i>. • For Faculty And Advisor, you can search on <i>All Students</i>, <i>My Students</i>, <i>My Advisees</i>, or <i>Both</i>.
Untitled (Search Criteria)	Field used to enter the ID or name search criteria. <ul style="list-style-type: none"> • For an ID, enter at least four characters. • For a name, enter data in the format last name, first name or initial, such as <i>Jones , M</i>.
Untitled (Results)	Displays list of results for the search by name and ID. You can select a student from the list and continue. <p>Alternate student names are presented in the results. Third party IDs are not included at this time.</p>
Password	Student password. You must enter the password to continue.

Prepare for Registration

Use this page to view the registration status for a student or to update the student data for a term. Use the *Registration Status* tab and the *Update Student Term Data* tab to access this information. This page is available for users with the *STUDENT* and *REGISTER* persona type codes.



Note: The *Update Student Term data* tab is only displayed when it has been activated. When it has not been activated, only the *Registration Status* tab is available on this page.

Registration Status

The *Registration Status* tab displays information about items that affect a student's ability to register for a selected term. It reports time-ticket assignments or time control messages, holds, academic standing, student status, study path status, calculated student classification, and primary curriculum details. In addition, it displays a summary of any hours already earned. The information is taken from the student record that is currently in effect for the selected term. Curriculum data elements are displayed for the current and active primary curriculum, as well as for any current and active secondary curricula in effect for the term selected.

Example status messages could be:

- *Your student status permits registration.*
- *Your overall academic status permits registration.*
- *You have no holds which prevent registration.*
- *Time tickets do not allow registration at this time.*

An error is displayed if registration is prevented due to study path status, academic standing status, or combined academic standing and progress evaluation status. When registration is prevented due to the student's overall academic standing codes, general student status, or override standing, any study path statuses that prevent registration are not displayed. It is assumed that no study path can be used during registration when the student's overall standing or status prevents registration.

The SVQ_SOVLCUR_TERM view presents current and active curriculum records by term.

Refer to the "Registration Status tab" topic at the end of this section for more information on status message configuration and conditions for message display.

Fields	Descriptions
Term	Term code and description for which the registration status information is displayed.
<i>The following fields/messages are displayed in the Registration Status information.</i>	
Student Status	Message indicating whether the student's status affects his or her ability to register for the selected term.
Academic Standing	Message indicating whether the student's academic standing affects his or her ability to register for the selected term.
Combined Academic Standing	Message indicating whether the student's combined academic standing affects his or her ability to register for the selected term.
Study Path Status	Message indicating the study path in which the student is eligible to register when study paths are in use.
Holds	Message indicating whether or not registration holds exist for the student that prevent registration.
Class Standing	Message indicating the student's classification for registration (such as, Freshman, Year 3, and so on).
Time Tickets	<p>Message indicating the time controls by date and time range during which the student can register.</p> <p>If registration is not permitted, the message <i>Time tickets do not allow registration at this time</i> is displayed.</p> <p>If no time ticket has been assigned, the message <i>You have no Registration Time Ticket. You may register at any time</i> is displayed.</p>

Fields	Descriptions
Permit Override	Message indicating the permit override for the CRN, subject and course number, course title, and permit override type.
Earned Hours	Message indicating the student's earned hours information by student level, institutional or transfer hours, and number of hours for each level in Academic History.
<i>The following fields are displayed in the Primary Curriculum Information.</i>	
Primary Curriculum	Name of the student's current active primary curriculum. If the student has multiple current active primary curricula, the set of fields will be displayed multiple times.
(Primary) Study Path	Study path associated with the current active primary learner curriculum.
(Primary) Level	Student level associated with the current active primary learner curriculum.
(Primary) College	Name of the college associated with the current active primary learner curriculum.
(Primary) Degree	Name of the degree associated with the current active primary learner curriculum.
(Primary) Program	Name of the program associated with the current active primary learner curriculum.
(Primary) Campus	Name of the campus associated with the current active primary learner curriculum.
(Primary) Catalog Term	Catalog term code and description associated with the current active primary learner curriculum.
(Primary) Admit Term	Admit term code and description associated with the current active primary learner curriculum.
(Primary) Admit Type	Admit type code and description associated with the current active primary learner curriculum.
(Primary) Major	Name of the major associated with the current active primary learner curriculum. This field is displayed multiple times if there are multiple majors.
(Primary) Department	Name of the department associated with the current active primary learner curriculum. This field is displayed multiple times if there are multiple departments.
(Primary) Major Concentration	Name of the concentration associated with the major for the current active primary learner curriculum. This field is displayed multiple times if there are multiple major concentrations.

Fields	Descriptions
(Primary) Minor	Name of the minor associated with the current active primary learner curriculum. This field is displayed multiple times if there are multiple minors.
(Primary) Concentration	Name of the base concentration for the current active primary learner curriculum. This concentration is not attached to any major. This field is displayed multiple times if there are multiple concentrations.
(Primary) Other field of study	Name of any other field of study associated with the current active primary learner curriculum. This field is displayed multiple times if there are multiple other fields of study.

The following fields are displayed in the Secondary Curriculum Information.

Secondary Curriculum	Name of the student's current active secondary curriculum. If the student has multiple current active secondary curricula, the set of fields will be displayed multiple times.
(Secondary) Study Path	Study path associated with the current active secondary learner curriculum.
(Secondary) Level	Student level associated with the current active secondary curriculum.
(Secondary) College	Name of the college associated with the current active secondary curriculum.
(Secondary) Degree	Name of the degree associated with the current active secondary learner curriculum.
(Secondary) Program	Name of the program associated with the current active secondary curriculum.
(Secondary) Campus	Name of the college associated with the current active secondary curriculum.
(Secondary) Catalog Term	Catalog term code and description associated with the current active secondary learner curriculum.
(Secondary) Admit Term	Admit term code and description associated with the current active secondary learner curriculum.
(Secondary) Admit Type	Admit type code and description associated with the current active secondary learner curriculum.
(Secondary) Major	Name of the major associated with the current active secondary learner curriculum. This field is displayed multiple times if there are multiple majors.
(Secondary) Department	Name of the major and department associated with the current active secondary learner curriculum. This field is displayed multiple times if there are multiple departments.

Fields	Descriptions
(Secondary) Major Concentration	Name of the concentration associated with the major for the current active secondary learner curriculum. This field is displayed multiple times if there are multiple major concentrations.
(Secondary) Minor	Name of the minor associated with the current active secondary learner curriculum. This field is displayed multiple times if there are multiple minors.
(Secondary) Concentration	Name of the base concentration for the secondary learner curriculum. This field is displayed multiple times if there are multiple concentrations.
(Secondary) Other field of study	Name of any other field of study associated with the current active secondary learner curriculum. This field is displayed multiple times if there are multiple other fields of study.

Update Student Term Data

The Update Student Term Data tab allows students to update the major, educational goal, and employment expectation information stored in the general student record (SGASTDN). The major, educational goal, and employment expectation can be modified for any term in which the student has not already registered or changed this information. When no changes are needed, a message is displayed, and the student can exit from the page. If data is successfully changed, a message is displayed that the update was successful.

If a student tries to access this information for a term for which changes have already been made or in which registration has already occurred, the page is displayed as read only, and the student is alerted that no changes are required at this time. If a student accesses a term for which no student record (SGASTDN) exists, no major is available to be selected.

Inactive students cannot update their term data. For example, when a student's general student record (SGASTDN) has the **Student Status** code of `Inactive Due to Graduation`, and the **Allow Registration** indicator on STVSTST is set to N for the status code, the student is not allowed to update the term data.

The Update Student Term Data tab is delivered in a disabled state. To enable/display the tab, set the `updateStudentTermData` item to Y in the `StudentRegistrationSsb_configuration.groovy` file. Set the `updateStudentTermData` item to N to disable/not display the tab. The display can be turned on or off as you choose. If you do not wish to use the page or do not allow students to make these updates, you can turn the display off. For more information on enabling this tab, please refer to the *Banner Student Registration Installation Guide 9.x*.

The order in which the **Major**, **Educational Goal**, and **Employment Expectation** fields are displayed on the page can be customized using the Overall Page and Field Configuration Page (SOAWSCR). This configuration replaces the GTVSDAX rules used in Banner 8.x.

Fields	Descriptions
Major	<p>Student's major for the term. When the major is updated, the SORLCUR and SORLFOS tables are updated. This field is required.</p> <p>The majors listed for selection are determined by the curriculum checking rules on SOACTRL.</p> <ul style="list-style-type: none"> • When Perform Curriculum Checking is set to Yes, the majors listed will only be choices within that student's existing curriculum rule. • When Perform Curriculum Checking is set to No, all majors with the Major indicator checked on STVMAJR will be listed.
Educational Goal	<p>Student's educational goal for the term. When the educational goal is updated, the SGBSTDN record is updated.</p> <p>The display of this field can be configured using the Overall Page and Field Configuration Page (SOAWSCR).</p>
Employment Expectations	<p>Student's employment expectation for the term. When the employment expectation is updated, the SGBSTDN record is updated.</p> <p>The display of this field can be configured using the Overall Page and Field Configuration Page (SOAWSCR).</p>
Submit	<p>Button used to submit changes for the student.</p>

Class Search and Registration

Use this page to perform the following tasks:

- search on classes
- select CRNs for registration
- view plans
- perform block registration
- perform projected registration
- perform structured registration
- view a schedule and options

Find Classes

The Find Classes section of the page allows you to perform basic and advanced searches for class information. Use the Find Classes tab to access the search criteria. The SVQ_CLASSEARCH view facilitates searches on class sections.



Note: Course abbreviations must use all capital letters. Mixed case and lower case are not used. For example, the name “ART” is correct. The names “Art” or “art” are not correct.

Basic Search Criteria

Use any of the following criteria to perform a search. No fields are required. Fields left blank indicate a search for “all”. Fields with the tool tip *You can add another* allow multiple values to be selected for the search. Use the **Search** button to continue or the **Clear** link to re-enter the search criteria.

Fields are delivered to display for a basic search or an advanced search. Fields can be rearranged between the two search areas by modifying the elements on the Overall Page and Field Configuration Page (SOAWSCR).

Fields	Descriptions
Term	Term selected for the search.
Subject	Course subject. Select one or more values from the list.
Course Number	Course number with course description. Select one or more values from the list.
Keyword	<p>Enter partial words you want to find, using wildcards on the front and back of the string, such as %string%. The search uses an AND operator. The search returns courses that match the partial keywords entered.</p> <p>For example, if you were searching for MATH 203, the following strings would find a match:</p> <ul style="list-style-type: none">•Ath 03•Mat 20•At 0 <p>The following strings would not find a match:</p> <ul style="list-style-type: none">•Math 444•Ath 4•English 203

Advanced Search Criteria

Select the **Advanced** link to access this section. You can use the following criteria to perform an advanced search. No fields are required. Fields left blank indicate a search for

“all”. Fields with the tool tip *You can add another* allow multiple values to be selected for the search. Use the **Search** button to continue or the **Clear** link to search again.

Fields	Descriptions
Term	Term selected for the search.
Subject	Course subject and description. Select one or more values from the list.
Course Number	Course number. Select a value from the list.
Keyword	<p>Enter partial words you want to find, using wildcards on the front and back of the string, such as <code>%string%</code>. The search uses an AND operator. The search returns courses that match the partial keywords entered.</p> <p>For example, if you were searching for MATH 203, the following strings would find a match:</p> <ul style="list-style-type: none"> •Ath 03 •Mat 20 •At 0 <p>The following strings would not find a match:</p> <ul style="list-style-type: none"> •Math 444 •Ath 4 •English 203
Instructor	Course instructor and description. Select one or more values from the list.
Subject and Course Number	Course subject and course number with course description. Select one or more values from the list.
Keyword (With All Words)	<p>Enter <i>all</i> the words you want to find. The search uses AND logic. Sections returned contain <i>all</i> of the words entered.</p> <p>For example, if you enter <code>History American</code>, only classes with both <code>History</code> and <code>American</code> in any of the fields searched by keywords are returned, such as <code>Latin American History</code>, <code>History of the American West</code>, or <code>American Cultures</code> with a subject description of <code>History</code>.</p>

Fields	Descriptions
Keyword (With Any Word)	<p>Enter <i>any</i> of the words you want to find. The search uses OR logic. Sections returned contain <i>at least one</i> of the words entered.</p> <p>For example, if you enter <code>History</code>, any classes with History in any of the fields searched by keywords are returned.</p> <p>If you enter <code>History Math</code>, any classes with History or Math in any of the fields searched by keywords are returned.</p>
Keyword (Exact Phrase)	<p>Enter the <i>exact</i> phrase you want to find. Sections returned contain the <i>exact</i> phrase entered.</p> <p>For example, if you enter <code>Introduction to</code>, any classes with that phrase are returned, such as Introduction to Accounting, Introduction to Math.</p>
Keyword (Without the Word)	<p>Enter the word you do <i>not</i> want to find. This option <i>must</i> be used with another Keyword search field, such as All, Any, Partial, or Phrase.</p> <p>Sections returned contain the words entered in the Keyword (With Any Word) and Keyword (With All Words) fields but do <i>not</i> contain the word entered here.</p> <p>For example, if you enter <code>History</code> as any keyword and <code>American</code> as the word to exclude, the search returns sections with <i>History</i> in any of the fields searched by keywords, but none of the sections returned includes <i>American</i>.</p>
Attribute	Course attribute and description. Select one or more values from the list.
Campus	Course campus and description. Select one or more values from the list.
Level	Course level and description. Select one or more values from the list.
Buildings	Building in which course meets with description. Select one or more values from the list.
College	Course college and description. Select one or more values from the list.
Departments	Course department and description. Select one or more values from the list.
Instructional Methods	Course instructional method and description. Select one or more values from the list.

Fields	Descriptions
Schedule Type	Course schedule type and description. Select from the list.
Duration	Course duration, for open learning courses only. Enter a numerical value and choose a duration unit from the list, for example a numerical value of 4 and unit value of <i>weeks</i> .
Part of Term	Course part of term and description. Select one or more values from the list.
Title	Course title. Enter the complete course title for the search.
Sessions	Course session and description. Select one or more values from the list.
Course Number	Course number.
Course Number Range	Course number range with from and to numbers
Credit Hour Range	Course credit hour range with from and to hours
Meeting Days: Monday	Check box used to only show courses that meet on Monday.
Meeting Days: Tuesday	Check box used to only show courses that meet on Tuesday.
Meeting Days: Wednesday	Check box used to only show courses that meet on Wednesday.
Meeting Days: Thursday	Check box used to only show courses that meet on Thursday.
Meeting Days: Friday	Check box used to only show courses that meet on Friday.
Meeting Days: Saturday	Check box used to only show courses that meet on Saturday.
Meeting Days: Sunday	Check box used to only show courses that meet on Sunday.
Start Time (On or after)	Course start time with hours, minutes, and AM or PM. Select values from the lists.
End Time (On or after)	Course end time with hours, minutes, and AM or PM. Select values from the lists.
Open Sections Only	Check box used to indicate that only sections with available seats should be returned by the search. This works with the settings on SOATERM.

Find Classes Results

This section of the page displays the results of the search when the Select a Term page radio group was set to **Term** and then the class search was performed.

Use the **Add** button to add a class to the summary in preparation for registration.



Note: The display of classes is not dependent on the setting of the **Print on Schedule** check box on the Course Registration Status Code Validation Page (STVRSTS).

The display of search results for linked classes is dependent on the configuration of the Course Details window on SOAWSCR. If you do not want linked courses to display in the Course Details, they will not be displayed in the search results. If you do want linked courses to be displayed in the Course Details, they will be displayed in the search results.

The schedule type information is always displayed as part of the title information when the **Displayed** indicator is checked on SOAWSCR. The setting of the **Display Number** field does not have any effect on the display order on the page.

Fields	Descriptions
Term	Term code and description for the term in which the course is offered.
Title, Schedule Type	Course title. Schedule type is listed below the course title if it is configured for display.
Subject	Subject code.
Subject Description	Course subject description.
Course Number	Course number.
Section	Section number.
Hours	Course credit hours.
CRN	Course reference number.
Term	Course term and description.
Instructor	Course instructor or instructors.
Meeting Times	Course meeting information, including meeting days, times, buildings, and rooms.
Campus	Course campus.
Status	Course status as to how many seats are filled and how many remain.

Fields	Descriptions
View Linked	Button used to view groups of linked sections for the course in a separate page, where you can select the Add All button to add a specific group of linked sections to the registration summary.
Add	Button used to add the course to the summary, in preparation for registration. This is displayed for courses that were searched on with the Select a Term page set to search on a term.
Select	Check box used to select an open learning course and add it to the summary when the Submit button is clicked. This is displayed for courses that were searched on with the Select a Term page set to search on a date range.

Find Classes Results - Linked Sections

Use this section of the page to review groups of linked sections for the course in the Find Classes Results display. You can add the linked sections by group instead of one at a time using the **Add All** button. You can use the **Panels** button at the bottom of the page to expand or hide the schedule and summary information.

Fields	Descriptions
Back to Search Results	Button used to return to the Find Classes Results display.
Term	Term code and description for the term in which the course with the linked sections is offered.
Title, Schedule Type	Course title for the course with linked sections that was selected in the Find Classes Results display. Schedule type is listed below the course title if it is configured for display.
CRN	Course reference number of the course with linked sections that was selected in the Find Classes Results display.

The following fields are in the detail for the linked sections.

Title	Title of the linked section.
Subject	Subject code for the linked section.
Subject Description	Course subject description for the linked section.
Course Number	Course number for the linked section.
Section	Section number of the linked section.
Hours	Course credit hours for the linked section.

Fields	Descriptions
CRN	Course reference number for the linked section.
Term	Term and description for the linked section.
Instructor	Course instructor or instructors for the linked section.
Meeting Times	Course meeting information, including meeting days, times, buildings, and rooms for the linked section.
Campus	Course campus for the linked section.
Status	Course status as to how many seats are filled and how many remain in the linked section.
Add All	<p>Button used to add a specific group of linked sections for the course to the registration summary.</p> <p>When this button is selected for a group of linked sections, it is disabled for the other groups of linked sections displayed for the course. The linked sections are added to the registration summary with a status of <i>Pending</i>. If the linked sections are removed from the registration summary, the button is enabled again for the groups of linked sections for the course.</p>

Confirm Your Selections window

When you search by date range instead of term, and use the **Select** check box and the **Submit** button in the Find Classes Results to add those courses to the summary, this window is displayed. Use the **Submit** button in this window to proceed with registration or the **Cancel** button to close the window.

Fields	Descriptions
Term	Term in which course is offered.
Course Title	Course title.
Subject	Course subject.
Course Number	Course number.
Section	Course section number.
Credit Hours	Course credit hours.
CRN	Course reference number.
Schedule Type	Course schedule type.
Study Path	Study path associated with the course.
Duration Unit	Course duration unit, such as weeks, months, and so on.
Start Date	Course start date.

Fields	Descriptions
End Date	Course end date.
Status	Course registration status.
Action	Action to be taken for the course, such as register for the course, waitlist the course, remove the course from the summary, drop the course, drop the course with a penalty, or none (no action to be taken), and so on. Select a value from the list. This value comes from the Action Description field on STVRSTS.

Schedule information

The schedule information is displayed in the lower section of the page. It consists of the Schedule view, the Schedule Details view, and the Summary of the schedule.

Schedule view

The Schedule View shows the class schedule by day and hour in the bottom left section of the page. Use the Schedule tab to display this view. Use the **Panels** button to display and hide the schedule and summary information.

The display of registered courses for the selected term is controlled by the **Print On Schedule** check box on the Course Registration Status Code Validation Page (STVRSTS). Only courses with statuses for which the **Print On Schedule** check box is selected are included when the schedule is displayed. It is recommended that statuses for dropped courses should not have the **Print On Schedule** check box selected, as listing dropped courses on the schedule may cause confusion.

The Schedule information is displayed for the following tabs: Find Classes, Enter CRNs, Plans, Blocks, Projections, Structured, Schedule and Options, and Schedule by Centric Period. This information is updated as changes are made.

Schedule Details view

The Schedule Details View shows the class schedule in detailed format in the bottom left of the page. The registration status displayed here is updated when changes are made to courses in the Summary section. Use the Schedule Details tab to display this view. Use the **Panels** button to display and hide the schedule and summary information.

The Schedule Details information is displayed for the following tabs: Find Classes, Enter CRNs, Plans, Blocks, Projections, Structured, Schedule and Options, and Schedule by Centric Period. This information is updated as changes are made.

Summary of the schedule

This Summary section of the page on the bottom right shows the classes selected for registration and the student's existing schedule. Think of this area as a shopping cart

where you can place the courses you wish to consider for registration. As courses are added, the status of Pending is displayed. Use the **Submit** button to continue and register for the courses. Use the **Panels** button to display and hide the schedule and summary information.

If you attempt to leave the Summary section while you have pending courses for registration, you are prompted to stay and continue or leave and not retain your changes.

When you submit a course for registration, all registration errors are displayed in the Notification Center. You do not need to correct an error and then register again and then correct the next error that is displayed. You can view the course details and see what each error requires (such as restrictions, prerequisites, and so on) in order to continue with registration for that course.

The Summary information is displayed for the following tabs: Find Classes, Enter CRNs, Plans, Blocks, Projections, and Structured. This information is updated as changes are made.

Here are the fields in the registration summary.

Fields	Descriptions
Course Title	<p>Course title.</p> <p>When you click on the specific course title name link, such as Introduction to Accounting, you can access a Course Details window with a subset of links and view detailed information for:</p> <ul style="list-style-type: none"> • Class Details • Bookstore Links • Course Description • Syllabus • Attributes • Restrictions • Faculty/Meeting Times • Enrollment/Watilist • Corequisites • Prerequisites • Mutual Exclusion • Cross Listed Courses • Linked Courses • Fees • Catalog <p>All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.</p>
Details	Course subject, course number, section number.
Hours	Course credit hours.

Fields	Descriptions
CRN	Course reference number.
Schedule Type	Course schedule type. This is displayed in the Find Classes Results and Find Classes - Linked Sections summary information.
Status	Course registration status.
Action	Action to be taken for the course, such as register for the course, waitlist the course, remove the course from the summary, drop the course, drop the course with a penalty, drop the course and delete the record, or none (no action to be taken), and so on. Select a value from the list. This value comes from the Action Description field on STVRSTS.
Total Hours Registered	Total registration hours for the courses in the summary.
Total Hours Billing	Total billing hours for the courses in the summary.
Total Hours CEU	Total continuing education units for the courses in the summary.
Total Hours Min	Total minimum registration hours for the courses in the summary.
Total Hours Max	Total maximum registration hours for the courses in the summary.
Conditional Add and Drop	Check box used to indicate that all changes to the schedule are required for registration. This check box is displayed in the Summary section of Find Classes, Enter CRNs, Blocks, and Projections when the Allow Student to Select Conditional Add Drop indicator is checked for the term on SOATERM.
Submit	Button used to submit the schedule for registration.

Enter CRNs

Use this section of the page to enter CRNs directly and add them to the class summary. You can add up to ten CRNs at a time using the **Add Another CRN** link, and then click the **Add to Summary** button. Use the Enter CRNs tab to access this information.

Fields	Descriptions
CRN	Course reference number and description.
Add Another CRN	Link used to display additional CRN fields.

Fields	Descriptions
Add to Summary	Button used to add CRNs to the summary.

Refer to the “Schedule Information” topic in the “Find Classes” section for information on the Schedule view, Schedule Details view, and Summary of the schedule in the lower portion of the page.

Confirm Your Dates

When a CRN is entered for an open learning course in the Enter CRNs section, a secondary window is displayed. Use this window to view the course information with the permitted start and end dates. Enter the date for when the course will be officially started, and the expected date of completion will be populated by the system based on the duration. Use the **Confirm** button to save the changes or the **Cancel** button to close the window.

Fields	Descriptions
Course Title	Course title for the open learning course.
Subject	Course subject for the open learning course.
Course Number	Course number for the open learning course.
CRN	Course reference number for the open learning course.
Section	Course section number for the open learning course.
Duration	Course duration for the open learning course.
Start Date	Permitted start date range is displayed. Enter the selected start date for the open learning course.
End Date	Permitted end date range is displayed. Enter the selected end date for the open learning course.
Remove	Click Remove to remove the course from the summary of pending courses for registration.

Register for Classes path - administrative view

When you are logged in as an administrator (persona of REGISTRAR), a more detailed view of the summary section is displayed for Find Classes Results and Enter CRNs in the Register for Classes path. You can expand the summary full page width and view course information that reflects the Course Information section of the Student Course Registration Page (SFAREGS).



Note: You can continue to use the 8.x version of SFAREGS for registration processing while development of the Self-Service administrative view is in progress. However, you cannot use the same student for registration in 8.x and 9.x at the same time.

Here is some information on how an administrator can override fatal errors in Self-Service Registration. When a CRN is entered, and fatal errors are encountered, all existing errors are displayed in the Notification Center. The errors can be overridden using one of two options in the **Override** field in the administrative view.

- **Override all possible errors** - This options sets all of the error flags in the SFRSTCR record to Overridden.
- **Override only existing fatal errors** - This option sets the related error flag in the SFRSTCR record to Overridden.

For example, an institution may not have entered prerequisites associated with sections at the time of registration. The fatal error rule for prerequisites on SOATERM may have been applied later, after registration for these classes has already taken place.

- When **Override only existing fatal errors** has been selected, a batch process can be run that checks prerequisites and corequisites. The student IDs with **Override only existing fatal errors** selected or those student IDs having no fatal errors are shown on the report. The errors can be resolved on SFAREGS by override or deletion.
- When **Override all possible errors** has been selected, the associated student IDs are not shown on the report.

Fields	Descriptions
Course Title	<p>Course title.</p> <p>When you click on the specific course title name link, such as Introduction to Accounting, you can access a Course Details window with a subset of links and view detailed information for:</p> <ul style="list-style-type: none"> • Class Details • Bookstore Links • Course Description • Syllabus • Attributes • Restrictions • Faculty/Meeting Times • Enrollment/Watilist • Corequisites • Prerequisites • Mutual Exclusion • Cross Listed Courses • Linked Courses • Fees • Catalog <p>All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.</p>

Fields	Descriptions
Details	Course description and subject code, course number, section number, and CRN.
Campus	Campus code of the campus where the course is offered.
Part of Term	Part of term code for the course.
Schedule Type	Schedule type code for the course.
Instructional Method	Instructional method code for the course, if one exists.
Registration Date	Date of registration for the course.
Status	<p>Course registration status type for the Action field.</p> <p>The status type describes the course registration status code. This field is display only and represents the value defined for the status code in STVRSTS.</p>
Action	<p>Action to be taken for the course, such as register for the course, waitlist the course, remove the course from the summary, drop the course, drop the course with a penalty, drop the course and delete the record, or none (no action to be taken), and so on. Select a value from the list.</p> <p>This value comes from the Action Description field on STVRSTS.</p> <p>You have the option to perform a combined drop and delete, where the course is dropped and the record is deleted, or you can drop the course and retain the record in the database.</p>
Credit Hours	<p>Course credit hours.</p> <p>When the “i” tooltip is displayed, you can view a variable credit hours range for the course, such as 3 to 4, and reset the hours, such as to 3.</p>
Bill Hours	<p>Course billing hours.</p> <p>When the “i” tooltip is displayed, you can view a variable billing hours range for the course, such as 3 to 4, and reset the hours, such as to 3.</p>
Attempted Hours	<p>Student’s attempted hours for the course. The field is populated by the existing SFTREGS_CREDIT_HR_HOLD value when the STVRSTS_ATTEMPTED_HRS_IND is set to Y.</p>
Time Status Hours	<p>Student’s time status hours for the course that will be used in the time status calculation. The field is populated by the existing SFTREGS_CREDIT_HRS_HOLD value when the STVRSTS_INCL_TMST_IND is set to Y.</p>

Fields	Descriptions
Grade Mode	Grade mode code and description for the course. This can be changed using the pulldown list of values.
Approval Received	<p>Checkbox used to indicate that the student has received the appropriate instructor or advisor approval needed to register for the class.</p> <p>This field is used when the Special Approval indicator is set on SSASECT, and the Approval radio group is set to Fatal on SOATERM in the Section Options.</p>
Override	<p>Course registration restriction override. This value can be changed using the pulldown list of values when fatal errors exist. When no fatal errors exist, the pulldown list is disabled, and no values are displayed.</p> <p>You can choose to override all possible registration errors, override only fatal errors, or not override any errors. When multiple errors are displayed in the Notification Center, you can override all of the errors at one time, instead of overriding each error separately.</p> <p>Values are:</p> <ul style="list-style-type: none"> • None • Override all possible errors - sets all error flags in the SFRSTCR record to Overridden, saved to the database as ALL • Override only existing fatal errors - sets the related error flag in the SFRSTCR record to Overridden, saved to the database as Y
Level	Student level code and description. This value can be changed using the pulldown list of values.
Study Path	Study paths available to the student. This value can be changed using the pulldown list of values.
Registration Status	Registration status code and description, such as RE, Registered.
Total Hours Registered	Total registration hours for the courses in the summary.
Total Hours Billing	Total billing hours for the courses in the summary.
Total Hours CEU	Total continuing education units for the courses in the summary.
Total Hours Min	Total minimum registration hours for the courses in the summary.
Total Hours Max	Total maximum registration hours for the courses in the summary.
Submit	Button used to submit the schedule for registration.

Plans - Plan Ahead path

The Plan Ahead path is selected on the Registration Landing page. The Select a Term page is then displayed with terms that are available for use with planning, based on the setup on SOATERM. (The **Term open for Self-Service planning** indicator is checked for the term.)

When the student selects a term, the Select a Plan page is displayed, and the student (or other users with personas that are granted security access) can create new student registration plans, edit or delete existing plans, or view plans from Degree Works for the term, based on the interface configured on SOAREST and the settings on SOATERM. (The **Check third party degree audit system plan** indicator is checked on SOATERM.)

Plan Ahead - Select a Plan

The Select a Plan tab displays the term, the maximum number of plans you can have based on the **Maximum plans for term value** defined on SOATERM, and a listing of any student registration plans created for the term. Existing student registration plans are displayed for the term with the plan name and the user (and persona) who created the plan. These plans are displayed in an expanded view. You can create a new plan if the maximum number of plans has not been reached. You can also delete or edit plans as needed.

Use the **Create New Plan** button to build a new student registration plan by searching on courses and then viewing class sections, if sections have been made available in planning on SOATERM. (The **Allow adding course sections to plan** indicator is checked.) A plan name must be entered to save the plan.

Use the **Delete** or **Edit** buttons to remove or modify an existing plan. When you choose to edit a student registration plan, the selected plan is displayed in the Summary section of the page. New courses or sections found in the course search or through other options can be added to the plan summary. You can remove courses or sections from the plan using the **Action** pulldown. **Remove** is displayed as an option if the course or section has not been saved in the plan. **Delete** is displayed as an option if the course or section has been saved in the plan.

The Select a Plan tab can also display existing Degree Works Student Educational Plans (SEPs) for the term. Degree Works plans are always displayed in a list below existing student registration plans on the Plan Ahead - Select a Plan page. To view details of a Degree Works plan, the Degree Works tab must be selected. Degree Works plans cannot be edited. However, once you decide to edit existing student registration plans or create new plans, the Degree Works tab will display the Degree Works SEPs, and you can add courses that exist in Degree Works plans to your plan summary.

Fields

Descriptions

Term

Term code and description of the term in which the plan is active.

Fields	Descriptions
Create New Plan	<p>Button used to create a new student registration plan.</p> <p>This takes you to Find Classes with the basic and advanced searches. The plan summary is also displayed for the student registration plan.</p>
Plan	<p>Student registration plan name entered by the user or Degree Works (SEP) plan name generated by the third party degree audit system interface.</p>
Created by and Persona	<p>User who created the plan. The persona is displayed when plans are created by a different login ID user.</p> <p>A link to the faculty card is available from the user name when the person is a faculty member.</p>
My Preferred Plan/Make Preferred	<p>Text and links displayed when preferred plans are in use.</p> <p>The preferred plan displays the notation “My Preferred Plan”. Other plans display a link for Make Preferred that can be selected to change the non-preferred plan to be the preferred plan.</p> <p>This option is only available to students.</p>
Approved/Approve This Plan/Remove Approval	<p>Text and links displayed when a plan has been approved by a faculty member or advisor. Multiple plans can be approved.</p> <p>The approved plan displays the notation “Approved”. Approved plans display a link for Remove Approval that can be selected to unapprove the plan. Unapproved plans display a link for Approve This Plan that can be selected to approve the plan.</p> <p>This option is only available to faculty members or advisors.</p>
Title	<p>Course title.</p> <p>When you click on the specific course title name link, such as Introduction to Accounting, you can access a Course Details window with a subset of links and view detailed information for each link.</p> <p>All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.</p>
Details	<p>Course subject, course number, and section number.</p>
Hours	<p>Course hours.</p>
CRN	<p>Course reference number.</p>
Schedule Type	<p>Course schedule type.</p>

Fields	Descriptions
Instructor	Course instructor or instructors.
Grade Mode	Course grade mode.
Note	<p>Button used to view a note added about the overall student registration plan or notes associated with courses or classes in the plan. A check mark indicates data exists for the note.</p> <p>Notes can only be entered or updated when a new plan is created or an existing plan is edited. Otherwise, notes are display only. Degree Works plan notes cannot be edited.</p>
Delete	<p>Button used to remove a plan and all associated courses.</p> <p>Only the plan creator can delete the plan.</p> <p>Degree Works (SEP) plans cannot be deleted. You can only add classes or sections to your student registration plan summary from a Degree Works plan that is displayed in the Degree Works tab.</p>
Edit	<p>Button used to access the class search when modifying an existing plan.</p> <p>Only the plan creator can edit the plan.</p> <p>Degree Works (SEP) plans cannot be edited. You can only add classes or sections to your student registration plan summary from a Degree Works plan that is displayed in the Degree Works tab.</p>
Total Planned Hours	Total planned hours for the courses in the plan for the term.
Number of Degree Works Plans	<p>Number and list of plans found and loaded from Degree Works.</p> <p>Degree Works plans are only shown when third party plans are set up to display on SOATERM, the interface is set up on SOAREST, and Degree Works plans exist for the student and term.</p> <p>(The Check third party degree audit system plan indicator is checked, and the Display Third Party Plans in registration indicator is checked on SOATERM.)</p> <p>When you create a new plan or edit an existing plan, you can access the Degree Works tab to add courses from the Degree Works plan to the student registration plan summary.</p>

Plan Ahead - Find Classes Search and Results

This view of Plan Ahead displays the basic and advanced searches you can use to find the courses and/or sections to add to the Summary section of the student registration plan. Find Classes is accessed using the **Create New Plan** button or the **Edit** button when editing an existing student registration plan.

You can view the Schedule, Schedule Details, and Summary sections for the plan. When the Find Classes - Search Results data is displayed, the following options are available.

- Use the **Search Again** button to perform a new search.
- Use the **Add Course** button to add the course to the student registration plan summary. There is no course or class restriction checking in student registration planning.
- Use the **View Sections** button to access a list of class sections for a course returned by the search.

(This button is displayed when the **Allow adding course sections to plan** indicator is checked on SOATERM.)

- Use the **Add** button in the view section results to add the section to the plan summary. There is no course or class restriction checking in student registration planning.
- Use the **Catalog Search Results** button in the view section results to return to the search results.
- Use the **Save Plan** button in the Summary section to save student registration plan changes.

Refer to the “Schedule Information” topic in the “Find Classes” section for information on the Schedule view, Schedule Details view, and Summary of the schedule in the lower portion of the page.

The Summary used with the Plan Ahead path displays the total planned hours and any combined *previously registered and CEU hours*. Only *planned* sections or courses can be added or removed from the registration plan summary in the Plan Ahead path. Registered classes displayed in the registration plan summary are informational only and cannot be modified. Changes to registered classes must occur in the registration plan summary in the Register for Classes path.

Please refer to the “Find Classes” topic earlier in this section for information on using basic and advanced searches and for field definitions.

Please refer to the “View Sections” topic under the “Browse Course Catalog” topic for field definitions and information on sections returned by a search.

Plan Ahead - Faculty member and advisor access

Faculty members and advisors can be given access to planning to create registration plans for students. After choosing the Plan Ahead path, logging in, and selecting a term, the faculty member or advisor must then enter a student ID (password). If security is passed based on the PLAN Ahead process rules on SOAFACS, the faculty member or advisor can access the Select a Plan page and create student registration plans up to the maximum allowed per user ID as defined on SOATERM.

All plans created for students or by students are displayed in the Select a Plan page, along with any Degree Works SEPs. When plans are displayed that were not created by the login ID user, the name of the plan creator and the associated persona are displayed.

Faculty members and advisors *cannot* mark any plan created by a student as preferred. They *can* approve any plans created by the student or plans created for the student by that login user ID. Faculty members or advisors *can* edit or delete plans they had previously created for students. No plans can be deleted or edited that were not created by the login ID user.

Plan Ahead - Created by Others

The Created by Others tab is displayed in the Plan Ahead path, when plans exist that were created by users other than the login ID user. Students, faculty members, and advisors can access this tab. Multiple plans are displayed by name and can be expanded to view the courses in each plan.

When you choose to edit a plan or create a new plan, you can view the plans created by other individuals or personas. Plans that are displayed here can be used to add courses and/or classes to a student's personal plan in the registration plan summary. These plans cannot be edited by anyone other than the plan creator.

Fields	Descriptions
Number of Plans not created by me	Number of plans created by others that can be viewed and used to update a student's registration plan.
Term	Term code and description of the selected term that is open for registration planning.
Plan Title	Title of registration plan created by another individual.
Created By and Persona	User who created the plan. The persona is displayed when plans have been created by another login ID user. A link to the faculty card is available from the user name when the person is a faculty member.
Add All	Button used to add courses and/or sections from a plan created by a user other than the student to the registration plan summary.
Title	Course title. When you click on the specific course title name link, such as Introduction to Accounting, you can access a Course Details window with a subset of links and view detailed information for each link. All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.
Details	Course subject, course number, and section number.
Hours	Course hours.

Fields	Descriptions
Schedule Type	Course schedule type.
Instructor	Course instructor or instructors.
Grade Mode	Course grade mode.
Note	Button used to access a note added about the plan item or the overall plan. A check mark indicates data exists for the note.
View Sections	Button used to display the sections associated with the course. When sections are displayed, you can use the Add button to add a section to the student registration plan.
Add Course	Button used to add the course to the student registration plan.

Refer to the “Schedule Information” topic in the “Find Classes” section for information on the Schedule view, Schedule Details view, and Summary of the schedule in the lower portion of the page.

The Schedule View in this path displays planned classes in the student registration plan with assigned days and times. Courses in the student registration plan are not displayed in the schedule, as courses do not have assigned days and times. In addition, should registration exist in this term, those classes are displayed in the Schedule View with a status of `Registered`.

Plan Ahead - Degree Works plans

Third party degree audit registration plans, such as those from Degree Works, can be used with Banner student registration plans. Degree Works uses Student Educational Plans (SEPs) that are created in the Student Planner. SEPs can be loaded to Banner for use in creating student registration plans. However, they are not editable. They are only used as a reference when creating Banner student registration plans. Also, processing student registration plans using Degree Works plans does not send updates back to Degree Works.

Use the Degree Works tab in the Plan Ahead path to access Degree Works (SEP) plans when the third party interface has been set up on SOAREST, third party degree audit system plans are active for the term on SOATERM, and third party plans exist in Degree Works for use with student registration planning.

Fields	Descriptions
Number of Degree Works Plans for this term	Number of Degree Works (SEP) plans available for the term.
Term	Term code and description of the selected term that is open for registration planning.
Plan Title	Title of Degree Works registration plan.

Fields	Descriptions
Created By	User who created the plan.
Critical Indicator	Check box used to indicate whether the course was flagged as critical for the student's curriculum requirements in Degree Works.
Title	<p>Course title from Degree Works.</p> <p>When you click on the specific course title name link, such as Introduction to Accounting, you can access a Course Details window with a subset of links and view detailed information for each link.</p> <p>All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.</p>
Details	Course subject, course number, and section number from Degree Works.
Hours	Course hours from Degree Works.
Delivery	Delivery method for the course, such as online or lecture, from Degree Works.
Choice Group	Group the course is associated with such as prerequisite, corequisite, linked course, and so on, from Degree Works.
Choice Description	Description of the choice group from Degree Works.
Attribute Summary	Attribute associated with the course, such as Honors Program, from Degree Works.
Note	Button used to access a note added about the plan item or the overall plan. A check mark indicates data exists for the note.
View Sections	Button used to display the sections associated with the Degree Works course from the SEP. When sections are displayed, you can use the Add button to add a section to the student registration plan.
Add Course	Button used to add the course to the student registration plan.

Refer to the "Schedule Information" topic in the "Find Classes" section for information on the Schedule view, Schedule Details view, and Summary of the schedule in the lower portion of the page.

The Schedule View in this path displays planned classes in the student registration plan with assigned days and times. Courses in the student registration plan are not displayed in the schedule, as courses do not have assigned days and times. In addition, should registration exist in this term, those classes are displayed in the Schedule View with a status of *Registered*.

Plan Ahead - Name Your Plan

When you save your plan, the Name Your Plan window is displayed so you can enter and save your plan with a descriptive name. If you do not enter a name and select **Save**, the system assigns a generic name, such as *Class Schedule for Registration Fall 203610*.

Fields	Descriptions
Plan Name	Registration plan name.

Plans - Register for Classes path

This view of the Plans tab is displayed when you select the Register for Classes path from the Registration Landing page, you have student registration plans and/or Degree Works plans for the selected term, and the term is open for registration planning.

In order for student registration plans and Degree Works (SEP) plans to be displayed in the Register for Classes path, the third party interface needs to be configured on SOAREST, and the following SOATERM settings must be checked:

- **Check third party degree audit system plan**
- **Display Self-Service Plans in registration**
- **Display third party degree audit system plans in registration**

Use the Plans tab to register for sections from student registration plans and/or Degree Works (SEP) plans. Plans are displayed in a list and can be collapsed or expanded to view plan detail. When plans are expanded, student registration plans have a different column configuration than Degree Works plans.

Student registration plans created in the Plan Ahead path are term-based and can consist of courses and/or sections. Students can register directly from these plans. The planning term will always match the registration term. It is important to note that plans cannot be modified in the Register for Classes path.

When a student selects a term in the Register for Classes path, he/she will always be presented with the Find Classes tab. If the student has existing registration plans that were created in the Plan Ahead path and the SOATERM settings have been defined, the student can navigate to the Plans tab and register for classes using his/her student registration plans and/or Degree Works plans.

You can view the Schedule, Schedule Details, and Summary sections for registration from the Plans tab.

- Use the **Add** button to add the section from a plan to the registration summary. You can never add courses to the registration summary.

Degree Works plans *only* consist of courses, so it is necessary to view available sections and then add the sections from the Degree Works plans to the registration plan summary. Student registration plans can consist of courses and/or sections, so you can either view sections associated with courses in a student registration plan, add sections

directly to the registration summary, or view additional sections for an existing section in the student registration plan and select a different CRN.

- Use the **View Sections** button to view a list of class sections for a course in the plan. You can also view available sections from an existing section in the student registration plan to search for and select a different CRN.
- Use the **Add** button to add the section to the registration plan summary.
- Use the **Return to Plan** button to go back to the Plans tab and continue registering from the listed student registration plans and/or Degree Works plans.
- Use the **Search** button from the View Sections window to navigate to the Class Search.
- Use the **Submit** button in the registration summary to register for the classes that have been added to the summary.

Please refer to the “View Sections” topic under the “Browse Course Catalog” topic for field definitions and information on sections returned by a search.

Here are the fields that are displayed for student plans in the Register for Classes path and the Plans tab.

Fields	Descriptions
Term	Term code and description of the term in which the plan is active.
Plan	Student registration plan name entered by the user or Degree Works (SEP) plan name generated by the third party degree audit system interface.
Created by and Persona	User who created the plan. The persona is displayed when the plan was created by another login ID user. A link to the faculty card is available from the user name when the person is a faculty member.
My Preferred Plan	Text displayed for the student’s preferred plan.
Name and Persona of Approved Plan	Name and persona displayed when a plan has been approved by a faculty member or advisor.
Title	Course title. When you click on the specific course title name link, such as Introduction to Accounting, you can access a Course Details window with a subset of links and view detailed information for each link. All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.
Details	Course subject, course number, and section number.
Hours	Course hours.

Fields	Descriptions
CRN	Course reference number.
Schedule Type	Course schedule type.
Instructor	Course instructor or instructors.
Grade Mode	Course grade mode.
Note	Button used to access a note added about the plan item or the overall plan. A check mark indicates data exists for the note. All notes in the Register for Classes path are display only.
View Sections	Button displayed when registering from a plan and the class section needs to be selected for a course or the section needs to be changed.
Add	Button displayed when registering from a plan and the class section needs to be added to the plan.

Here are the fields that are displayed for Degree Works plans in the Register for Classes path and the Plans tab.

Fields	Descriptions
Number of Degree Works Plans for this term	Number of Degree Works (SEP) plans available for the term.
Term	Term code and description of the selected term that is open for registration planning.
Plan Title	Title of Degree Works registration plan.
Created By	User who created the plan.
Critical Indicator	Check box used to indicate whether the course was flagged as critical for the student's curriculum requirements in Degree Works.
Title	Course title from Degree Works. When you click on the specific course title name link, such as Introduction to Accounting, you can access a Course Details window with a subset of links and view detailed information for each link. All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.
Details	Course subject, course number, and section number from Degree Works.
Hours	Course hours from Degree Works.

Fields	Descriptions
Delivery	Delivery method for the course, such as online or lecture, from Degree Works.
Choice Group	Group the course is associated with such as prerequisite, corequisite, linked course, and so on, from Degree Works.
Choice Description	Description of the choice group from Degree Works.
Attribute Summary	Attribute associated with the course, such as Honors Program, from Degree Works.
Note	Button used to access a note added about the plan item or the overall plan. A check mark indicates data exists for the note.
View Sections	Button used to display the sections associated with the Degree Works course from the SEP. When sections are displayed, you can use the Add button to add a section to the student registration plan.
Add Course	Button used to add the course to the student registration plan.

Register for Classes - Tuition and Fees

When you submit a classes or a registration plan for registration and fee assessment is in use, the Tuition and Fees link is displayed in the Summary section of the page. When you click on the link, the Tuition and Fees window is displayed. The data in this window is display only and contains a link to your account information in Banner Student Self-Service 8.x.

Fields	Descriptions
Code	Detail code for the student's fee.
Description	Detail code description for the student's fee.
Amount	Detail code charge amount for the student's fee.
Total Hours	Total charges on the student's account for this term. This amount does not represent all that may be owed on the student's account.
Total Credit Hours	Total hours for registration.

Blocks

Use this section of the page to view and select blocks of courses for scheduling and registration. Use the Blocks tab to access this section of the page. You can select a block

using the associated radio button. Once a block has been selected, the information for the summary and calendar is display only. The **Action** field in the Summary section cannot be changed.

Depending on how your block rules are defined, you can add or drop classes within a block. You can also add or drop an entire block. When a block is dropped, all courses within the block are dropped. The drop process follows existing Web Registration rules including AUTODROP, based on the settings for the term on SOATERM. (These settings were formerly housed on GTVSDAX.) Changes are reflected in the SFRBSEL, SFRSTCR, and SFRSTCA tables.

In order to drop a block, only one course registration status for drop or withdraw can be available on all classes in the block. The default drop or withdraw course registration status code is entered on GTVSDAX under the internal code WEBRSTSDRP and internal group WEBREG. The drop or withdraw course registration status must be valid for each part of term on all classes within the block, or valid for open learning classes within the block.

In the List View of the student’s schedule, a course that is associated with a block displays the block detail. For example, for the course NURS 3100 Section 1, the detail could be, *Block member of: Third Year Nursing Second Semester Track 1.*

Fields	Descriptions
Select Your Block Option	<p>Radio group that displays options appropriate for the student such as enrolling in a new block, changing enrollment in a block, or removing an enrolled block from the student’s schedule. The available options are displayed above each block and include the specific block name.</p> <p>Values are:</p> <ul style="list-style-type: none"> • Suggested Block: Block Name - This option is displayed when the block has been pre-assigned to the student. • Alternate Block: Block Name - This option is displayed when the student has met a rule to which the block has been attached. • Drop all classes that are part of your current block: Block Name - This option is displayed when the student is registered in the block and is allowed to drop the block.
Term	Term code and description for the registration block selection.
Block	Registration block name and description.
Title	<p>Course title for the course in the registration block.</p> <p>A Calendar button is displayed for an open learning course, so the student can enter the start or end date.</p>
Subject	Subject for the course in the registration block.

Fields	Descriptions
Subject Description	Course subject description.
Course	Course number for the course in the registration block.
Section	Section number for the course in the registration block.
Hours	Credit hours for the course in the registration block.
CRN	Course reference number for the course in the registration block.
Term	Term for the course in the registration block.
Instructor	Instructor for the course in the registration block.
Meeting Times	Meeting information, including meeting days, times, buildings, and rooms, for the course in the registration block.
Campus	Campus for the course in the registration block.
Status	Registration status for the course in the registration block.
Conditional Add and Drop	<p>Check box used to indicate that all changes to the schedule are required for registration.</p> <p>This check box is displayed in the Summary section of Find Classes, Enter CRNs, Blocks, and Projections when the Allow Student to Select Conditional Add Drop indicator is checked for the term on SOATERM.</p>
Process Block	<p>Button used to submit the block changes for registration.</p> <p>This button is active when changes have been made.</p>

Refer to the “Schedule Information” topic in the “Find Classes” section for information on the Schedule view, Schedule Details view, and Summary of the schedule in the lower portion of the page.

Projections

Use this section of the page to review the projected courses for the student and term based on CAPP program requirements or third party program requirements. Courses are designated as mandatory or elective. The student can search on and view sections and add them to the registration summary. Use the Projections tab to access this information.

The display of courses is based on the restriction and projected registration settings on SOATERM. You can choose to only display projected courses. No courses are displayed when projected courses are not available for the term. In this case the following message is displayed: *There are no projected courses for this term. Contact an administrator.* You can also include failed courses in the projection and/or mark failed courses as most probable for the projection.

The SVQ_PROJECTIONRESULTS view is used to collect projected course details by joining the Course Search Result View (SVQ_COURSESEARCH) and the SFRREGP

table. The output is used to display projected registration data in Self-Service for a student.

Fields	Descriptions
Title	<p>Course title, subject title, or attribute title.</p> <p>Course title is displayed when the projected record has a course.</p> <p>Subject title is displayed when the projected record is not a course and only has a subject.</p> <p>Attribute title is displayed when the projected record is not a course, does not have a subject, and only has an attribute.</p>
Details	Course subject and number range.
Type	Indicates whether the course is mandatory or elective.
Attribute	Course attribute description.
View Sections	Button used to view sections of the course.
Conditional Add and Drop	<p>Check box used to indicate that all changes to the schedule are required for registration.</p> <p>This check box is displayed in the Summary section of Find Classes, Enter CRNs, Blocks, and Projections when the Allow Student to Select Conditional Add Drop indicator is checked for the term on SOATERM.</p>
Submit	Button used to submit the schedule for registration.

Refer to the “Schedule Information” topic in the “Find Classes” section for information on the Schedule view, Schedule Details view, and Summary of the schedule in the lower portion of the page.

View Sections

This section of the page displays section-related information for the course on the Projections tab. This data is accessed using the **View sections** button and is presented as a list of sections in the Find Classes tab. When a course has no associated sections, a corresponding message is displayed.

When the section count for a course is more than ten, the **Refine** link is displayed at the top right of the page. Use this link to further refine the list of sections from which to choose. Use the **Add** button to add the section to the registration summary. Use the **Return to Projections** button to return to projected course list in the Projections tab.

Fields	Descriptions
Return to Projections	Button used to go back to the projected course list.

Fields	Descriptions
Program	Program of study for the sections.
Term	Term code and description for the term in which the course is offered.
Refine	Link used to refine the list of sections presented.
Title	Title of the course. When you click on the specific Title link for the course, such as Introduction to Accounting, you can view the term and CRN and access a subset of links and view detailed information for each link.
Subject Description	Course subject description from the course catalog.
Course Number	Course number from the course catalog.
Section	Section number from the course catalog.
Hours	Course credit hours from the course catalog.
CRN	Course reference number from the course catalog.
Term	Term in which the course is offered.
Instructor	Course instructor.
Meeting Times	Course meeting information which includes days of the week, times, building, room, start date, and end date.
Campus	Course campus.
Status	Course status as to how many seats are filled and how many remain, time conflicts, restrictions, and so on.
Add	Button used to add the section to the registration summary.
Conditional Add and Drop	Check box used to indicate that all changes to the schedule are required for registration. This check box is displayed in the Summary section of Find Classes, Enter CRNs, Blocks, and Projections when the Allow Student to Select Conditional Add Drop indicator is checked for the term on SOATERM.
Submit	Button used to submit the schedule for registration.

Structured

Use the Structured tab to view and select courses for registration based on CAPP program requirements or on third party program requirements.

Use the breadcrumb trail at the top of the page to see which level of information is being displayed. As you navigate to each new level, that new level is added to the breadcrumb

trail. A sample breadcrumb trail could be: *Top > Elective > Elective Classes for Year 1 > Select from the attached 9 requirements.*

The initial display may contain a message to select from a specific number of requirements and conditions or list headings of Mandatory, Elective, and Optional with requirements at lower levels of display. A check mark in a circle is used to show the completion status. The **View** button takes you down to the next level.

When the next level displays course information, the **View** button is replaced with a **View Sections** button. When the **View Sections** button is selected for a course, you are taken to the associated course sections. A **Refine** link is displayed which allows you to reduce the list of sections using the basic search parameters, and then add courses to the registration summary. That breadcrumb trail could be: *Top > Elective > Elective Classes for Year 1 > Select from the attached 9 requirements > Search Results.*

Use the **Structured Overview** button at the top right of the page to view a tiered hierarchy of requirements. (This button resembles a bulleted list with indented bullets and lines.) The tiered view shows all the requirements and conditions in one scrollable display, instead of drilling down through levels of data using the breadcrumb trail.

When an open learning course is selected, the Confirm Your Dates window is displayed. Use this window to view the course information with the permitted start and end dates. Enter the date when the course will be officially started, and the expected date of completion will be populated by the system based on the duration. Use the **Confirm** button to save the changes or the **Cancel** button to close the window.

Error severity for registration is defined on SOATERM for structured registration. You can set the severity to `Fatal` (registration changes are not saved until all structured registration requirements are met), `Warning` (registration changes are saved and the student is warned when structured registration requirements have not been met), or `None` (registration changes are saved, and the student is not informed when structured registration requirements have not been met).

Fields	Descriptions
Breadcrumb trail	Used to indicate which level of requirements are being viewed, for example, <i>Top > Mandatory > Mandatory Year 1.</i> This can be used to navigate back and forth through the levels of requirements.
Structured Overview	Button used to display a tiered list of requirements, ranges, and conditions in a separate window.
Program	Program code and description.
Term	Term code and description.
Instructions	Information about total of combined conditions and courses that must be selected or maximum credits that can be selected.
Select from...	Select from a list of requirements.

Fields	Descriptions
View	Button used to go down a level and view the course list of requirements.
Course List	List of courses the student can select from and drill down into and view requirement details. Courses can be specific or from a range. The check mark in the circle indicates the completion status of the requirement.
View Sections	Button used to view sections for a course in the list at that level of information.

Refer to the “Schedule Information” topic in the “Find Classes” section for information on the Schedule view, Schedule Details view, and Summary of the schedule in the lower portion of the page.

Search Results

You can search on sections of courses for the program requirements. You can refine the search and continue to review the results. Use the entries on SOAWSCR to create the list of fields a student can use to search. The fields must fit on one page, and course number range fields should be included. The search cannot be expanded to be an advanced search.

Refer to the "Find Classes" topic under "Class Search and Registration" for more information on search criteria.

Fields	Descriptions
Breadcrumb Trail	Levels of information that have been displayed.
Program Name	Name of program in use.
Course name	Name of course used in search.
Search Results	Number of classes returned in the search.
Term	Term code and description for the term in which the course is offered.
Title, Schedule Type	Course title. Schedule type is listed below the course title if it is configured for display.
Subject, Description	Subject code and description.
Course Number	Course number.
CRN	Course reference number.
Instructor	Course instructor or instructors.

Fields	Descriptions
Meeting Times	Course meeting information, including meeting days, times, buildings, and rooms.
Hours	Course credit hours.
Section	Section number.
Status	Course status as to how many seats are filled and how many remain.
Campus	Course campus.
Term	Course term and description.
Status	Course status as to how many seats are filled and how many remain.
Add	Button used to add the course to the summary, in preparation for registration.
Refine	Link used to open the search criteria to find more specific results.
Submit	Button used to submit the classes in the registration summary for registration.

Structured Overview window

This window is accessed using the **Structured Overview** button from any level of requirements data. This view displays a hierarchy of requirements that can be reviewed without drilling down through the levels of data using the breadcrumb trail. This view provides a visual display of requirements that have been met (green check mark), and /or still need to be met (gray check mark), based on mandatory, optional, or elective areas.

Schedule and Options

Use this section of the page to view a detailed summary of the class schedule for registration. You can update the hours, level, study path, and grade mode if you choose. Be aware that you cannot change course options on this section of the page when using a date range to search on and register for courses. Use the **Submit** button to save the changes and update the schedule. Use the Schedule and Options tab to access this information.



Note: The functionality for changing a selected study path is not available on the main Registration page in Banner 9.x. Students can use the Schedule and Options page to associate a study path with a specific class.

Fields	Descriptions
Term	Term for which student has registered for courses.
Email or Download	<p>Button used to email the schedule and download the schedule to a calendar.</p> <p>This button resembles a calendar within an envelope.</p>
Print	<p>Button used to print the schedule.</p> <p>This button resembles a printer.</p>
Title	<p>Title of the course.</p> <p>When you click on the specific course title name link, such as Introduction to Accounting, you can access a Course Details window with a subset of links and view detailed information for each link.</p> <p>All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.</p>
Subject	Course subject.
Course	Course number.
Section	Section number.
Hours	Course registration hours. This field can be changed.
CRN	Course reference number.
Schedule Type	Course schedule type.
Grade Mode	Course grade mode. This field can be changed. Use the link to display valid values.
Level	Course level. This field can be changed. Use the link to display valid values.
Study Path	Study path associated with the course. This field can be changed when study paths are in use. Use the link to display valid values.
Date	Date on which the student registered for the course.
Status	Course registration status.
Message	Course registration message.
Total Hours Registered	Total hours for which the student is registered for the term.
Total Hours Billing	Total hours for which the student will be billed for the term.
Submit	Button used to submit the schedule for registration.

Email and Download Schedule

Use the **Email/Calendar** button to display a window where you can enter email addresses to which you wish to send a schedule and a .ics internet calendar file. The email subject line contains the student's name and term, but it can be changed. You can send email to yourself and/or other parties. The .ics file is attached to the email and can be loaded to your calendar.

The email address that is marked as preferred and Web-enabled on the General Person Identification Page (SPAIDEN) will automatically be populated and checked when the button is selected. The button resembles a calendar in an envelope and is on the Schedule and Options, Look Up a Schedule, and Schedule by Centric Period tabs.

Fields	Descriptions
Myself (emailaddress@location.edu)	Check box used to send the email schedule and schedule calendar file to the student.
Email	Multiple fields, used to send the student's email schedule and schedule calendar file to other parties.
Subject	Email subject line. This defaults to the student's name and term. It can be changed.
Send	Button used to send student's email schedule to email and schedule calendar file.

Print Schedule

Use the **Print** button to view and print a schedule. You can view the schedule in print preview mode and then continue to your local printer to print the schedule document.

This button resembles a printer and is on the Schedule and Options and Look Up a Schedule tabs.

Registration Information

Use this page to view registration history for a student, after a term has been closed for registration. You can also view prior schedules and ungraded classes, as well as schedules that use student centric periods. To access this page, select the View Registration Information link from the Registration Landing page.

Look up a Schedule

Use the Look up a Schedule tab to access student schedules. You can pick a schedule for a term and then use the Schedule View and Schedule Detail View tabs to see more detail. When a student has past schedules in multiple terms, the schedules can be viewed by term.

When you select a term in order to look up a schedule under View Registration Information, and no active registration records exist for the student, the term may still be displayed as available for selection. This occurs when SFBETRM records still exist for courses that were dropped and/or deleted from the Student Course Registration Page (SFAREGS) or dropped in Self-Service.

Fields	Descriptions
Term	<p>Term for which schedules exist for past registration records.</p> <p>When a student has registration records in multiple terms, you can select each term for review.</p> <p>When no active registration record exists for a student, the term may still display in the list as available. This can occur when SFBETRM records exist.</p>
Email or Download	<p>Button used to email the schedule and download the schedule to a calendar.</p> <p>This button resembles a calendar within an envelope.</p>
Print	<p>Button used to print the schedule.</p> <p>This button resembles a printer.</p>
Title	<p>Title of the course.</p> <p>When you click on the specific course title name link, such as Introduction to Accounting, you can access a subset of links and view detailed information for each link.</p> <p>All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.</p>
Subject Description	Course subject description.
Course Number	Course number.
Section	Section number.
Hours	Course credit hours.
CRN	Course reference number.
Schedule Type	Schedule type.
Grade Mode	Grade mode used for the course.
Level	Course level.
Part of Term	Part of term course was taken in.
Study Path	Study path with which the course is associated.
Date	Date the course was added to the schedule.

Fields	Descriptions
Status	Course registration status.
Message	Course registration message.
Total Hours Registered	Total credit hours the student registered for.
Total Hours Billing	Total billing hours for the student.

Refer to the “Email and Download Schedule” and “Print Schedule” topics in the “Schedule and Options” section for more information on these scheduling options.

Active Registrations

Use the Active Registrations tab to access active registration records. This pertains to classes that are not considered to be complete for transcript use.

Fields	Descriptions
Course Information	Course title, course number, and section number.
Associated Term	Term for which a schedule exists for past registration. When a student has registration records in multiple terms, you can select each term for review.
CRN	Course reference number.
Status	Course registration status.
Status Date	Course registration status date.
Schedule Type	Schedule type for the course.
Credit Hours	Credit hours for the course.
Instructional Method	Instructional method for the course.
Campus	Campus for the course.
Start Date	Course start date.
End Date	Course end date.
Level	Course level.
Instructor	Instructor assigned to the course.
Grade Mode	Grade mode used for the course.

Schedule by Centric Period

Use the Schedule by Centric Period tab to view student schedules by student centric period. Schedule information is displayed by term for the student centric period.

Fields	Descriptions
Class Schedule For	Student centric period code. When multiple student centric periods are available for the student, you can select a code from the list to view different schedules.
Email or Download	Button used to email the schedule and download the schedule to a calendar. This button resembles a calendar within an envelope.
Title	Title of the course. When you click on the specific course title name link, such as Introduction to Accounting, you can access a subset of links and view detailed information for each link. All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.
Details	Course subject, course number, and section number.
Hours	Credit hours for the course.
CRN	Course reference number.
Schedule Type	Schedule type for the course.
Grade Mode	Grade mode used for the course.
Level	Course level.
Part of term	Part of term for the course.
Study Path	Study path with which the course is associated.
Date	Date on which registration for the course occurred.
Status	Course registration status.
Message	Registration message.
Total Hours Registered	Total registration hours for the courses in the student centric period.
Total Hours Billing	Total billing hours for the courses in the student centric period.
Total Hours CEU	Total continuing education units for the courses in the student centric period.

Refer to the “Email and Download Schedule” topic in the “Schedule and Options” section for more information on these scheduling options.

Browse Classes

This page allows you to perform basic and advanced searches for classes you may want to take or about which you want more information. To access this page, select the Browse Classes link from the Registration Landing page. This link takes you to the Select a Term page. Once you select a term or enter a date range, you can continue to the Class Search page.



Note: This page is used for searching only. No action can be taken on courses from this path.

You can perform basic or advanced searches. The results are displayed in the Browse Classes Search Results. Use the **Search Again** button to perform a new search.

Basic Search Criteria

Use any of the following criteria to perform a search. No fields are required. Fields left blank indicate a search for “all”. Fields with the tool tip *You can add another* allow multiple values to be selected for the search. Use the **Search** button to continue or the **Clear** link to re-enter the search criteria.

Fields are delivered to display for a basic search or an advanced search. Fields can be rearranged between the two search areas by modifying the elements on the SOAWSCR page.

Fields	Descriptions
Term	Term selected for the search.
Keyword (With All Words)	Enter <i>all</i> the words you want to find. The search uses AND logic. Sections returned contain <i>all</i> of the words entered. For example, if you enter <i>History American</i> , only classes with both <i>History</i> and <i>American</i> in any of the fields searched by keywords are returned, such as <i>Latin American History</i> , <i>History of the American West</i> , or <i>American Cultures</i> with a subject description of <i>History</i> .
Subject	Course subject. Select one or more values from the list.
Subject and Course Number	Course subject and course number with course description. Select one or more values from the list.
Instructor	Course instructor. Select a value from the list.

Advanced Search Criteria

Select the **Advanced** link to access this section. You can use the following criteria to perform an advanced search. No fields are required. Fields left blank indicate a search for

“all”. Fields with the tool tip *You can add another* allow multiple values to be selected for the search. Use the **Search** button to continue or the **Clear** link to search again.

Fields	Descriptions
Term	Term selected for the search.
Keyword (With All Words)	<p>Enter <i>all</i> the words you want to find. The search uses AND logic. Sections returned contain <i>all</i> of the words entered.</p> <p>For example, if you enter <code>History American</code>, only classes with both History and American in any of the fields searched by keywords are returned, such as Latin American History, History of the American West, or American Cultures with a subject description of History.</p>
Subject	Course subject and description. Select one or more values from the list.
Subject and Course Number	Course subject and course number with course description. Select one or more values from the list.
Instructor	Course instructor and description. Select one or more values from the list.
Keyword (With Any Word)	<p>Enter <i>any</i> of the words you want to find. The search uses OR logic. Sections returned contain <i>at least one</i> of the words entered.</p> <p>For example, if you enter <code>History</code>, any classes with History in any of the fields searched by keywords are returned.</p> <p>If you enter <code>History Math</code>, any classes with History or Math in any of the fields searched by keywords are returned.</p>
Keyword	<p>Enter partial words you want to find, using wildcards on the front and back of the string, such as <code>%string%</code>. The search uses an AND operator. The search returns courses that match the partial keywords entered.</p> <p>For example, if you were searching for MATH 203, the following strings would find a match:</p> <ul style="list-style-type: none"> •<code>Ath 03</code> •<code>Mat 20</code> •<code>At 0</code> <p>The following strings would not find a match:</p> <ul style="list-style-type: none"> •<code>Math 444</code> •<code>Ath 4</code> •<code>English 203</code>

Fields	Descriptions
Keyword (Exact Phrase)	<p>Enter the <i>exact</i> phrase you want to find. Sections returned contain the <i>exact</i> phrase entered.</p> <p>For example, if you enter <code>Introduction to</code>, any classes with that phrase are returned, such as <code>Introduction to Accounting</code>, <code>Introduction to Math</code>.</p>
Keyword (Without the Word)	<p>Enter the word you do <i>not</i> want to find. This option <i>must</i> be used with another Keyword search field, such as All, Any, Partial, or Phrase.</p> <p>Sections returned contain the words entered in the Keyword (With Any Word) and Keyword (With All Words) fields but do <i>not</i> contain the word entered here.</p> <p>For example, if you enter <code>History</code> as any keyword and <code>American</code> as the word to exclude, the search returns sections with <code>History</code> in any of the fields searched by keywords, but none of the sections returned includes <code>American</code>.</p>
Attribute	Course attribute and description. Select one or more values from the list.
Campus	Course campus and description. Select one or more values from the list.
Level	Course level and description. Select one or more values from the list.
Buildings	Building in which course meets with description. Select one or more values from the list.
College	Course college and description. Select one or more values from the list.
Departments	Course department and description. Select one or more values from the list.
Instructional Methods	Course instructional method and description. Select one or more values from the list.
Schedule Type	Course schedule type and description. Select from the list.
Duration	<p>Course duration, for open learning courses only.</p> <p>Enter a numerical value and choose a duration unit from the list, for example a numerical value of 4 and unit value of weeks.</p>
Part of Term	Course part of term and description. Select one or more values from the list.
Title	Course title. Enter the complete course title for the search.

Fields	Descriptions
Sessions	Course session and description. Select one or more values from the list.
Course Number	Course number.
Course Number Range	Course number range with from and to numbers
Credit Hour Range	Course credit hour range with from and to hours
Meeting Days: Monday	Check box used to only show courses that meet on Monday.
Meeting Days: Tuesday	Check box used to only show courses that meet on Tuesday.
Meeting Days: Wednesday	Check box used to only show courses that meet on Wednesday.
Meeting Days: Thursday	Check box used to only show courses that meet on Thursday.
Meeting Days: Friday	Check box used to only show courses that meet on Friday.
Meeting Days: Saturday	Check box used to only show courses that meet on Saturday.
Meeting Days: Sunday	Check box used to only show courses that meet on Sunday.
Start Time (On or after)	Course start time with hours, minutes, and AM or PM. Select values from the lists.
End Time (On or after)	Course end time with hours, minutes, and AM or PM. Select values from the lists.
Open Sections Only	Check box used to indicate that only sections with available seats should be returned by the search. This works with the settings on SOATERM.

Browse Classes Search Results

Here are fields for the courses found by the search, displayed in the Browse Classes Search Results with the number of records found.

Fields	Descriptions
Term	Term code and description for the term in which the course is offered.
Keyword	Type of keyword search used and data entered for the search, such as Keyword (With All Words): Accounting.

Fields	Descriptions
Search Again	Button used to return to the Class Search (Browse Classes) page and enter new search criteria.
Title	Title of the course. When you click on the specific course title name link, such as Introduction to Accounting, you can view the term and CRN and access a subset of links and view detailed information for each link. All links are displayed whether or not detail data exists. You can use SOAWSCR to turn off the display for specific links or to change the display order.
Subject Description	Course subject description.
Course Number	Course number.
Section	Section number.
Hours	Course credit hours.
CRN	Course reference number.
Term	Term in which the course is offered.
Instructor	Course instructor.
Meeting Times	Course meeting information which includes days of the week, times, building, room, start date, and end date.
Campus	Course campus.
Status	Course status as to how many seats are filled and how many remain, time conflicts, restrictions, and so on.

Browse Courses

This page allows you to perform basic and advanced searches for course catalog information. To access this page, select the Browse Course Catalog link from the Registration Landing page. This link takes you to the Select a Term page. Once you select a term, you can continue to the Browse Courses page.



Note: This page is used for searching only. No action can be taken on courses from this path.

You can perform basic or advanced searches. The results are displayed in the Browse Courses Search Results. Use the **Search Again** button to perform a new search. The SVQ_COURSESEARCH view facilitates searches on the Course Catalog.

Basic Search Criteria

Use any of the following criteria to perform a search. No fields are required. Fields left blank indicate a search for “all”. Fields with the tool tip *You can add another* allow multiple values to be selected for the search. Use the **Search** button to continue or the **Clear** link to re-enter the search criteria.

Fields are delivered to display for a basic search or an advanced search. Fields can be rearranged between the two search areas by modifying the elements on the SOAWSCR page.

Fields	Descriptions
Term	Term selected for the search.
Subject	Course subject. Select one or more values from the list.
Course Number	Course number with course description. Select one or more values from the list.
Keyword	<p>Enter partial words you want to find, using wildcards on the front and back of the string, such as <code>%string%</code>. The search uses an AND operator. The search returns courses that match the partial keywords entered.</p> <p>For example, if you were searching for MATH 203, the following strings would find a match:</p> <ul style="list-style-type: none">•Ath 03•Mat 20•At 0 <p>The following strings would not find a match:</p> <ul style="list-style-type: none">•Math 444•Ath 4•English 203

Advanced Search Criteria

Select the **Advanced** link to access this section. You can use the following criteria to perform an advanced search. No fields are required. Fields left blank indicate a search for “all”. Fields with the tool tip *You can add another* allow multiple values to be selected for the search. Use the **Search** button to continue or the **Clear** link to search again.

Fields	Descriptions
Term	Term selected for the search.
Subject	Course subject. Select one or more values from the list.

Fields	Descriptions
Course Number	Course number with course description. Select one or more values from the list.
Keyword	<p data-bbox="696 348 1365 474">Enter partial words you want to find, using wildcards on the front and back of the string, such as <code>%string%</code>. The search uses an AND operator. The search returns courses that match the partial keywords entered.</p> <p data-bbox="696 499 1333 558">For example, if you were searching for MATH 203, the following strings would find a match:</p> <ul data-bbox="699 575 821 680" style="list-style-type: none"> •Ath 03 •Mat 20 •At 0 <p data-bbox="696 705 1219 732">The following strings would not find a match:</p> <ul data-bbox="699 749 911 854" style="list-style-type: none"> •Math 444 •Ath 4 •English 203
Subject and Course Number	Course subject and course number with course description. Select one or more values from the list.
Keyword (With All Words)	<p data-bbox="696 968 1321 1056">Enter <i>all</i> the words you want to find. The search uses AND logic. Sections returned contain <i>all</i> of the words entered.</p> <p data-bbox="696 1081 1354 1241">For example, if you enter <code>History American</code>, only classes with both History and American in any of the fields searched by keywords are returned, such as Latin American History, History of the American West, or American Cultures with a subject description of History.</p>
Keyword (With Any Word)	<p data-bbox="696 1266 1365 1354">Enter <i>any</i> of the words you want to find. The search uses OR logic. Sections returned contain <i>at least one</i> of the words entered.</p> <p data-bbox="696 1379 1330 1476">For example, if you enter <code>History</code>, any classes with History in any of the fields searched by keywords are returned.</p> <p data-bbox="696 1501 1365 1593">If you enter <code>History Math</code>, any classes with History or Math in any of the fields searched by keywords are returned.</p>
Keyword (Exact Phrase)	<p data-bbox="696 1619 1276 1682">Enter the <i>exact</i> phrase you want to find. Sections returned contain the <i>exact</i> phrase entered.</p> <p data-bbox="696 1707 1321 1797">For example, if you enter <code>Introduction to</code>, any classes with that phrase are returned, such as Introduction to Accounting, Introduction to Math.</p>

Fields	Descriptions
Keyword (Without the Word)	<p>Enter the word you do <i>not</i> want to find. This option <i>must</i> be used with another Keyword search field, such as All, Any, Partial, or Phrase.</p> <p>Sections returned contain the words entered in the Keyword (With Any Word) and Keyword (With All Words) fields but do <i>not</i> contain the word entered here.</p> <p>For example, if you enter <code>History</code> as any keyword and <code>American</code> as the word to exclude, the search returns sections with <code>History</code> in any of the fields searched by keywords, but none of the sections returned includes <code>American</code>.</p>
Instructor	Course instructor and description. Select one or more values from the list.
Title	Course title. Enter the complete course title for the search.
Attribute	Course attribute and description. Select one or more values from the list.
Level	Course level and description. Select one or more values from the list.
College	Course college and description. Select one or more values from the list.
Division	Course division and description. Select one or more values from the list.
Departments	Course department and description. Select one or more values from the list.
Schedule Type	Course schedule type and description. Select from the list.
Course Number Range	Course number range with from and to numbers
Credit Hour Range	Course credit hour range with from and to hours

Browse Courses Search Results

Here are the fields for the courses found by the search, displayed in the Browse Courses Search Results with the number of records found.

Fields	Descriptions
Term	Term code and description for the term in which the course is offered.

Fields	Descriptions
Keyword	Type of keyword search used and data entered for the search, such as <code>Keyword (With All Words): Accounting</code> .
Search Again	Button used to return to the Course Search (Browse Course Catalog) page and enter new search criteria.
Title, Schedule Type	Title of the course with the schedule type. When you click on the specific course title name link, such as Introduction to Accounting, you can view the term and CRN and access a subset of links and view detailed information for each link. The schedule type is displayed with the course title if it is configured for display.
Subject Description	Course subject description from the course catalog.
Course Number	Course number from the course catalog.
Hours	Course credit hours from the course catalog.
Description	Course description from the course catalog.
View sections	Button used to view the sections for the course selected.

View Sections

This section of the page displays the section-related information for a course. Select a course on the Browse Courses Search Results page, and use the **View sections** button to access this data. When a course has no associated sections, you are prompted to search again. Use the **Catalog Search Results** button to return to the results display and then the **Search Again** button to perform a new search.

Fields	Descriptions
Catalog Search Results	Button used to return to the Browse Courses Search Results page.
Term	Term code and description for the term in which the course is offered.
Subject and Course Number	Subject and course number associated with the sections displayed.
Title	Title of the course. When you click on the specific Title link for the course, such as Introduction to Accounting, you can view the term and CRN and access a subset of links and view detailed information for each link.

Fields	Descriptions
Subject Description	Course subject description from the course catalog.
Course Number	Course number from the course catalog.
Section	Section number from the course catalog.
Hours	Course credit hours from the course catalog.
CRN	Course reference number from the course catalog.
Term	Term in which the course is offered.
Instructor	Course instructor.
Meeting Times	Course meeting information which includes days of the week, times, building, room, start date, and end date.
Campus	Course campus.
Status	Course status as to how many seats are filled and how many remain, time conflicts, restrictions, and so on.

Set up Registration Self-Service pages

This section contains administrative setup requirements for the Registration Self-Service pages.

Please refer to the *Banner Student 8.x User Guide* and the *Banner Student 8.x Self-Service User Guide* for setup information on existing functionality such as study paths and student centric periods.

Page or section	Item	Description
Select a Term	Term Control Page (SOATERM)	<p>Select the Activate on the Web (Master Web Control) check box to include the term in the Search a Term list.</p> <p>For registration to be allowed, select the Permit check box in the Registration section of the Term Information.</p> <p>Also complete the Web Registration Dates section in the Access Management information. If the Web registration dates are not current, the term will not be displayed in the Search a Term list.</p>

Page or section	Item	Description
	Term Control Page (SOATERM)	<p>Select the Study Path Required check box to require study paths for registration.</p> <p>Clear the Study Path Required check box to have study paths be optional.</p> <p>Select the Change Study Path check box to allow users to change the study path.</p> <p>Clear the Change Study Path check box to display the study path selected at registration, but not allow the user to change the study path.</p>
	Curriculum Rules Control Page (SOACTRL)	Select the Enable Study Paths check box to display and enable the Study Path field.
	Crosswalk Validation Page (GTVSDAX)	<p>Set the SCHBYDATE rule for group WEBREG to Y to display the Terms Open for Registration field for searches by term and/or the Start Date and End Date fields for searches by date range.</p> <p>If this rule is not set to Y, the values in the pulldown for the term are not displayed. If this rule is not found, the value is assumed to be N, and the values in the pulldown for the term are not displayed.</p>
	Crosswalk Validation Page (GTVSDAX)	Set the WEBTRMDTE rule for group STUWEB to Y to display date ranges for terms on all Banner Student Self-Service pages where the term is selected.
	Crosswalk Validation Page (GTVSDAX)	Set the WEBALTPINA rule for group WEBREG to Y to display the Alternate PIN field.
Select a Term - Name and ID Search	Crosswalk Validation Page (GTVSDAX)	Set the ALLFAC rule for group FACWEB to Y to display all student names in a search. This rule only controls Self-Service display. Use the process rule on SOAFACS for security processing.
	Crosswalk Validation Page (GTVSDAX)	Set the ALLADVR rule for group FACWEB to Y to display all advisee names in a search. This rule only controls Self-Service display. Use the process rule on SOAFACS for security processing.

Page or section	Item	Description
	Crosswalk Validation Page (GTVSDAX)	Set the REGADVISEE rule for group FACWEB to Y or N to control which advisee names are displayed in a search. <ul style="list-style-type: none"> • When set to Y, only advisees assigned to the advisor and registered for classes for the selected term are displayed. • When set to N, all advisees assigned to the advisor for the selected term are displayed, whether they are registered or not.
Find Classes	Schedule Page (SSASECT)	Select the Voice Response and Self-Service Availability check box for each class you want to be available in Self-Service.
Find Classes Results (and perform registration)	Crosswalk Validation Page (GTVSDAX)	Set the DISPENROLL rule for group WEBREG to Y to display the enrollment information in the Status field. Time status information and restrictions are also displayed.
	Crosswalk Validation Page (GTVSDAX)	Set the DISPWL rule for group WEBREG to Y to display the waitlist information in the Status field. Time status information and restrictions are also displayed.
	Crosswalk Validation Page (GTVSDAX)	Set the MAXREGNO rule for group WEBREG to the maximum number of registration attempts allowed for a student.
	Crosswalk Validation Page (GTVSDAX)	Set the CRNDIRECT rule for group WEBREG to Y to allow the student to add a class directly by entering the CRN.
	Crosswalk Validation Page (GTVSDAX)	Set the WEBRSTSDRP rule for group WEBREG to the Web drop course registration status code defined on STVRSTS to allow a student to drop a class.
	Crosswalk Validation Page (GTVSDAX)	Set the WEBRSTSREG rule for group WEBREG to the Web registered course status registration code defined on STVRSTS to allow a student to perform registration in Self-Service.
	Crosswalk Validation Page (GTVSDAX)	Set the REGACCTIME rule for group REGISTRATION to the number of minutes before timeout so a user can log into Self-Service for registration when the SFAREGS page is being used.
	Term Control Page (SOATERM)	Select the Basic indicator for the registration model.

Page or section	Item	Description
	Term Control Page (SOATERM) - Registration Summary	Set the Allow Student to Select Conditional Add Drop indicator to Y to allow a student to perform conditional adds and drops for courses.
	Term Control Page (SOATERM) - Registration Summary	Set the Allow Student to Drop their Last Class indicator to Y to allow students to drop their last class during registration.
	Term Control Page (SOATERM) - Registration Summary	<p>Set the Administration Drop Connected Course Errors radio group to indicate how administrative drops should be processed during registration in Self-Service.</p> <p>Drop - The class is automatically dropped. Errors are reported in the SFTRGAM table.</p> <p>Do Not Drop, Report in Administrative Error Table - An error is reported, but there is no automatic action taken by the system. Errors are reported in the SFTRGAM table.</p> <p>Do Not Report and Do Not Drop - No error is reported, and no automatic action is taken by the system.</p>
	Term Control Page (SOATERM) - Registration Summary	<p>Set the Auto Drop Connected Course Drop Errors radio group to indicate how automatic drops should be processed during registration in Self-Service.</p> <p>Drop Connected Course - Both classes in the pair are automatically dropped.</p> <p>Do Not Drop, Display Error - The student receives an error, but there is no automatic action taken by the system.</p> <p>Confirm to Drop - The student receives a message asking if the other class in the pair can be automatically dropped.</p> <p>Allow Connected Drops - The student can drop any class, even if it is a linked course, a corequisite, or a prerequisite. No cross checking is performed for the missing connected class.</p>

Page or section	Item	Description
Plans	Term Control Page (SOATERM)	<p>Check the Term open for Self-Service planning indicator to open the term in the Key block for registration planning.</p> <p>Enter the maximum number of plans allowed for the plan in the Maximum plans for term field.</p> <p>Check the Allow adding course sections to plan indicator to allow students to add <i>sections</i> to the plan. When unchecked, only <i>courses</i> can be added to the plan.</p> <p>Check the Check third party degree audit system plan indicator to allow use of third party registration plans in Self-Service.</p> <p>Check the Display Self-Service Plans in registration indicator to display student plans and let students add sections to the registration summary.</p> <p>Check the Display Third Party Plans in registration indicator to display third party degree audit system plans (such as Degree Works) and let students add sections to the registration summary.</p>
Blocks	Term Control Page (SOATERM) - Registration Summary	Set the Allow Student to Select Conditional Add Drop indicator to Y to allow a student to perform conditional adds and drops for courses.
	Term Control Page (SOATERM) - Registration Summary	Set the Allow Student to Drop their Last Class indicator to Y to allow students to drop their last class during registration.
	Term Control Page (SOATERM) - Registration Summary	<p>Set the Administration Drop Connected Course Errors radio group to indicate how administrative drops should be processed during registration in Self-Service.</p> <p>Drop - The class is automatically dropped. Errors are reported in the SFTRGAM table.</p> <p>Do Not Drop, Report in Administrative Error Table - An error is reported, but there is no automatic action taken by the system. Errors are reported in the SFTRGAM table.</p> <p>Do Not Report and Do Not Drop - No error is reported, and no automatic action is taken by the system.</p>

Page or section	Item	Description
	Term Control Page (SOATERM) - Registration Summary	<p>Set the Auto Drop, Connected Course, Drop Errors radio group to indicate how automatic drops should be processed during registration in Self-Service.</p> <p>Drop Connected Course - Both classes in the pair are automatically dropped.</p> <p>Do Not Drop, Display Error - The student receives an error, but there is no automatic action taken by the system.</p> <p>Confirm to Drop - The student receives a message asking if the other class in the pair can be automatically dropped.</p> <p>Allow Connected Drops - The student can drop any class, even if it is a linked course, a corequisite, or a prerequisite. No cross checking is performed for the missing connected class.</p>
Projections	Term Control Page (SOATERM)	<p>Select the Projected indicator for the registration model.</p> <p>Define information on the Projected Registration tab.</p>
	Crosswalk Validation Page (GTVSDAX)	<p>Define external code for the AREASELECT rule for group REGPROJSTRUCT.</p> <p>Define the external code for the CLASS rule for group REGPROJSTRUCT.</p> <p>Define the external code for the PRIADJFAC rule for group REGPROJSTRUCT.</p>
Structured	Term Control Page (SOATERM)	<p>Select the Structured indicator for the registration model.</p> <p>Define information on the Structured Registration tab.</p>
	Crosswalk Validation Page (GTVSDAX)	<p>Define external code for the AREASELECT rule for group REGPROJSTRUCT.</p> <p>Define the external code for the CLASS rule for group REGPROJSTRUCT.</p>
Schedule and Options	Crosswalk Validation Page (GTVSDAX) - Schedule and Options	<p>Set the DISPENROLL rule for group WEBREG to Y to display the enrollment information in the Status field. Time status information and restrictions are also displayed.</p>

Page or section	Item	Description
	Crosswalk Validation Page (GTVSDAX) - Schedule and Options	Set the DISPWL rule for group WEBREG to Y to display the waitlist information in the Status field. Time status information and restrictions are also displayed.
	Crosswalk Validation Page (GTVSDAX) - Course Details window	Set the DISPENROLL rule and the DISPWL rule for group WEBREG to Y to display the Enrollment/ Waitlist information in the Course Details window accessed from the Title field.
	Crosswalk Validation Page (GTVSDAX) - Course Details window	Set the DISPXL rule for group WEBREG to Y to display the Cross Listed Courses information in the Course Details window accessed from the Title field.
	Overall Page and Field Configuration Page (SOAWSCR)	Set the SCHEDULEBOOKSTORELINKS rule to display the Bookstore Link information in the Course Details window accessed from the Title field.
Registration Information	Crosswalk Validation Page (GTVSDAX)	Set the PROCESSSCP rule to Y to display the Schedule by Centric Periods tab.
Registration Status	Term Control Page (SOATERM)	To enable study paths, check the Enable Study Paths checkbox on SOACTRL. To require study paths, check the Study Path Required checkbox on SOATERM. To allow changes to study paths, check the Change Study Path checkbox on SOATERM.
Browse Classes	Crosswalk Validation Page (GTVSDAX)	Set the DISPENROLL rule and the DISPWL rule for group WEBREG to Y to display the Enrollment/ Waitlist information in the Course Details window accessed from the Title field.
	Crosswalk Validation Page (GTVSDAX)	Set the DISPXL rule for group WEBREG to Y to display the Cross Listed Courses information in the Course Details window accessed from the Title field.
	Overall Page and Field Configuration Page (SOAWSCR)	Set the SCHEDULEBOOKSTORELINKS rule to display the Bookstore Link information in the Course Details window accessed from the Title field.

Page or section	Item	Description
Browse Courses	Crosswalk Validation Page (GTVSDAX)	Set the DISPENROLL rule and the DISPWL rule for group WEBREG to Y to display the Enrollment/ Waitlist information in the Course Details window accessed from the Title field.
	Crosswalk Validation Page (GTVSDAX)	Set the DISPXL rule for group WEBREG to Y to display the Cross Listed Courses information in the Course Details window accessed from the Title field.

Faculty Card

Contact cards for faculty members are available in Self-Service Registration. They are accessed by clicking the link on the faculty member's name. The cards display faculty contact information such as name, title, department, address, phone number, and email address, as well as a photo if one is provided and photos have been set up to be displayed.

You can choose to not display the faculty card. However, the card will still appear if the user clicks on the link, but it will not contain faculty information. A message is displayed indicating that the faculty information is not available.

In order for information to be displayed on the card, the faculty member and/or advisor must have a record on the General Person Identification Page (SPAIDEN), as well as a record with an active status on the Faculty/Advisor Information Page (SIAINST).

The faculty card is available in the following registration paths:

- Register for Classes
- Plan Ahead
- View Registration Information
- Browse Classes (sections)
- Browse Course Catalog

Faculty Card data

Information displayed on the faculty card comes from the following sources.

Title

The faculty card displays the title of the faculty member. The title comes from the category on the Faculty/Advisor Information Page (SIAINST), which in turn uses category code

data from the Faculty Category Validation Page (STVFCTG). Faculty category validation codes define the category into which a faculty member is placed, such as Advisor, Professor, Instructor, and so on.

Department

The faculty card displays the home department associated with the faculty member from the Faculty College and Department information on SIAINST. If a home department is not identified, the faculty card uses the department with the highest associated percentage.

Address, phone, and email

The rules that determine which faculty office address, office phone number, and email address will be displayed on the faculty card are the same rules used to determine the office address, office phone number, and email address displayed in the Campus Directory. This ensures the consistency of contact information between the Campus Directory and the faculty card.

The faculty card displays the address for the faculty member from the address information on the General Person Identification Page (SPAIDEN). The office address rules on the Directory Options Rules Page (GOADIRO) determine which address is displayed on the faculty contact card. The address type on GOADIRO with the lowest priority number that matches an address type on SPAIDEN determines the address that is displayed on the faculty card.

The faculty card displays the phone number for the faculty member from the area code, phone number, and extension information on the General Person Telephone Page (SPATELE) or the Telephone tab on SPAIDEN. The office telephone rules on GOADIRO determine which phone number is displayed on the faculty card. The telephone type in GOADIRO with the lowest priority number that matches a telephone type on SPATELE determines the phone number that is displayed on the faculty card.

The faculty card displays the email address for the faculty member from the email address information on the E-Mail Address Page (GOAEMAL) or the E-mail tab on SPAIDEN. The email address must be configured with the **Preferred**, **Active**, and **Display on the Web** indicators checked.

Faculty Card configuration

Information displayed on the faculty card can be configured on the Overall Page and Field Configuration Page (SOAWSCR). Whenever a faculty member's name is displayed as a link in registration or planning, this card can be displayed. Here are some exceptions:

- If the faculty card is not set up to be displayed, and the user clicks on the link, the card will appear, but it will not contain faculty information. A message is displayed indicating that the faculty information is not available.
- For the REGISTRAR persona, when a faculty member is not active for the term, a message is displayed on the card in place of the faculty information.

- For the REGISTRAR persona, when information for a faculty member is confidential or when the faculty member is deceased, a message is displayed on the card in place of the faculty information.
- For the ANONYMOUS, STUDENT, FACULTY, ADVISOR, or FACULTY AND ADVISOR personas, when information for a faculty member is confidential or when the faculty member is deceased, a generic message, *No information is available at this time*, is displayed.
- For the ANONYMOUS, STUDENT, FACULTY, ADVISOR, or FACULTY AND ADVISOR personas, when information for a faculty member is inactive, a generic message, *No information is available at this time*, is displayed.

Default settings on SOAWSCR are used to configure the faculty card for authenticated users and anonymous users.

- Authenticated users are those who access a page that requires a login, such as Register for Classes, Plan Ahead, or View Registration. The default SOAWSCR settings for authenticated users are configured to display all faculty contact information. SOAWSCR can be configured to not display specific contact data.
- Anonymous users are those who access a page that does not require a login, such as Browse Courses or Browse Classes. The default SOAWSCR settings for anonymous users are configured to only the display the faculty name, department, and email address. This protects the faculty contact information from inadvertently being exposed to anyone with an internet connection.

Fields

Here are the fields that can be displayed on the card.

Fields	Descriptions
Name	Name of faculty member.
Title	Title of faculty member.
Department	Department of faculty member.
Address	Office address of faculty member.
Phone Number	Office phone number of faculty member.
Email Address	Office email of faculty member.

Faculty Card setup

Do the following to ensure that contact information is displayed on the faculty card.

1. Verify that the faculty member has a person record on the General Person Identification Page (SPAIDEN).

2. Verify that the faculty member is not designated as confidential or deceased on the General Person Page (SPAPERS).
3. Verify that the faculty member has a record on the Faculty/Advisor Information Page (SIAINST) with an active status.
4. Verify that the faculty member has a home college and department defined on SIAINST.
5. Verify that the faculty member has a category defined on SIAINST.
6. Set up the email address information on the E-mail Address Page (GOAEMAL) and indicate that the email is the preferred address, is active, and should be displayed on the Web.
7. Verify that office address and office phone directory item codes exist on the Directory Item Validation Page (GTVDIRO).
 - 7.1. Verify that the directory item code of ADDR_OF exists on GTVDIRO.
 - 7.2. Verify that the directory item code of TELE_OF exists on GTVDIRO.
8. Verify that the faculty member has an address record on SPAIDEN.
9. Verify that the faculty member has a telephone record on SPAIDEN.
10. Set up the office address display options using directory rules on the Directory Options Rules Page (GOADIRO).
 - 10.1. Verify that the directory item code of ADDR_OF exists on GOADIRO.
 - 10.2. Set up the office address type and priority using directory rules on GOADIRO under the directory item code of ADDR_OF.
 - 10.3. Set the address type on SPAIDEN equal to the address type for the ADDR_OF rule on GOADIRO.
11. Set up the office phone display options using directory rules on the Directory Options Rules Page (GOADIRO).
 - 11.1. Verify that the directory item code of TELE_OF exists on GOADIRO.
 - 11.2. Set up the office phone number type and priority using directory rules on GOADIRO under the directory item code of TELE_OF.
 - 11.3. Set the telephone type on SPAIDEN equal to the telephone type for the TELE_OF rule on GOADIRO.
12. Set up the phone number format in the `messages.properties` file.

Please refer to the *Banner Student Registration Installation Guide 9.x* for information on how to set up the phone number format.
13. Configure the display of the card information on the Overall Page and Field Configuration Page (SOAWSCR) for name, photo, title, department, address, phone number, and email address. This is for authenticated and/or anonymous users.
14. Configure the display of faculty photos.

The image folder location must be specified in the `banner_configuration` file for the `banner.picturesPath`. A default image is delivered and should be placed in this folder for use when a faculty image is not available for display.

Please refer to the *Banner Student Registration Installation Guide 9.x* for information on how to add and display photos.

Registration Status tab setup

Use the Overall Page and Field Configuration Page (SOAWSCR) to set up the display configuration rules for this tab.

- Page Code 450 (Register Status) lists all status and class code entries and requires that the student status is displayed.
- Page Codes 455 (Register Status Primary Curriculum) and 460 (Register Status Secondary Curriculum) display the primary and secondary curriculum information.

Status messages

Registration status messages are displayed in the Registration Status tab. Here is some detail on messages and conditions for message display.

Current student

When the student is not a current student for the term, the following message is displayed:

You are not a student for the selected term. Please contact the registration office.

Student status

The student's status is keyed off of the general student status.

- When the STVSTST_REG_IND is set to N, the following message is displayed:

Your Student Status prevents registration.

- When the STVSTST_REG_IND is set to Y, the following message is displayed:

Your Student Status permits registration.

Re-admittance

The student re-admittance requirement is based on the current general student record and the readmit term code in the SOBTERM table. The following message is displayed:

Student requires being readmitted.

Holds

The hold severity on the Term Control Page (SOATERM) must be set to `Fatal` for a hold status to prevent registration. When a registration hold exists for the current day, the following message is displayed:

Holds exist.

Academic status

The academic standing, progress evaluation, and combined academic standing are retrieved from the Term Course Maintenance Page (SHAINST). Those values are overridden by the values from the General Student Page (SGASTDN), when the override term on the current general student record equals the registration term. The current SGASTDN term must also equal the registration term. The following message is displayed:

Academic standing prevents registration.

Here are the possible academic standing conditions and the resulting messages that can be presented to the student.



Note: The study path is equal to the `SOBCTRL_STUDY_PATH_IND` value.

Status Conditions	Message
Combined Academic Status is Null Academic Status code is Null Study Path is N	<i>Academic Standing permits registration.</i>
Combined Academic Status is Null Academic Status code is Null Study Path is Y	<i>Your overall Academic Standing permits registration.</i>
Combined Academic Status Null Academic Status Not Null STVASTD_PREVENT_REG is Y Study Path is N	<i>Your Academic Standing is %01% which prevents registration.</i>
Combined Academic Status Null Academic Status Not Null STVASTD_PREVENT_REG is Y Study Path is Y	<i>Your overall Academic Standing is %01% which prevents registration.</i>

Status Conditions	Message
Combined Academic Status is Null Academic Status Not Null STVASTD_PREVENT_REG is N Study Path is N	<i>Your Academic Standing is %01% which permits registration.</i>
Combined Academic Status is Null Academic Status Not Null STVASTD_PREVENT_REG is N Study Path is Y	<i>Your overall Academic Standing is %01% which permits registration.</i>
Combined Academic Status is Not Null Combined Academic Status prevents registration Study Path is N	<i>Your Academic Standing is %01%.</i> <i>Your Progress Evaluation Standing is %01%.</i> <i>Your Combined Academic Standing is %01% which prevents registration.</i>
Combined Academic Status is Not Null Combined Academic Status prevents registration Study Path is Y	<i>Your overall Academic Standing is %01%.</i> <i>Your overall Progress Evaluation Standing is %01%.</i> <i>Your overall Combined Academic Standing is %01% which prevents registration.</i>
Combined Academic Status is Not Null Combined Academic Status does not prevent registration Study Path is N	<i>Your Combined Academic Standing is %01% which permits registration.</i>
Combined Academic Status is Not Null Combined Academic Status does not prevent registration Study Path is N	<i>Your overall Combined Academic Standing is %01% which permits registration.</i>

Study path

The study path standing is displayed when the Academic Standing Status is configured on SOAWSCR to display and the following is true:

- The study path is enabled in the SOBCTRL table.

- The student has a study path.
- The student's combined academic status allows registration.
- The student's academic standing allows registration.
- The student's status allows registration.

When the study path does not allow registration, the following message is displayed:

Academic Standing prohibits registration for Study Path %01%.

When the study path combined with the academic standing does not allow registration, the following message is displayed:

Combined Academic Standing prohibits registration for Study Path %01%.

When the study path enrollment status does not allow registration, the following message is displayed:

Study Path Status prohibits registration for Study Path %01%.

Hours earned by level

The student's total for institutional and transfer earned hours in the SHRTGPA table is displayed for all levels. The hours earned information is not displayed if no earned hours exist for the student.

Permit overrides

Permit overrides for the term are displayed when they exist. The permit override information is not displayed when no overrides exist for the student.

Time tickets

Two rules on the Crosswalk Validation Page (GTVSDAX) are used with time ticketing.

- When the WEBMANCONT rule for group WEBREG rule is N, registration uses group time ticketing controls.
- When the WEBRESTTKT rule for group WEBREG is Y, registration is restricted to using time tickets.

When time tickets exist, the status is displayed when it prevents the student from registering at the time the page is opened.

Setup is required on the following administrative pages:

1. Add the priority and time slot on the Registration Priority Control Page (SFARCTT).
2. Add the time slot to a group on the Registration Group Control Page (SFARCTL).
3. Add the student to the group on the Student Registration Group Query Page (SFIRGRP).

Please refer to the "Registration" chapter in the *Banner Student User Guide* for detailed information on setting up and using time ticketing with registration.

The following message is displayed for time tickets:

This table contains information about registration time slots. You may register during the following times.

Class code

The student's class code calculation includes in-progress courses when that option is checked on the Tern Control Page (SOATERM).

Curriculum

All current and active curriculum records are displayed for the LEARNER module and the registration term.

The concentrations attached to majors are always displayed below the major to which the concentration is attached. The display order entered for concentrations attached to majors will always be the same as the major display order. Uncheck the display indicator if you do not wish to display concentrations attached to majors.

The standard format for curricula display is:

- Primary or Secondary label
- Study path name
- Level
- College
- Degree
- Program
- Campus
- Catalog Term
- Admit Term
- Admit Type
- Major and Department
- List all concentrations attached to each major
- Minors
- Concentrations attached to the base curriculum
- Other fields of study

Appendix - Extensibility in Registration

Extensibility is one of the key features of Banner 9.x. It uses tools, techniques, documentation, and source code to make Banner easier to tailor for existing and changing business requirements.

The following extensibility tools are delivered for Banner Student Registration:

- Configure Page Components
- Domain Extension Tool

The following administrative pages are delivered with Banner Student Registration:

- Information Text Editor Page (GUAINFO)
- SSN/SIN Alternate ID Search Page (GUIALTI)
- General Search Page (GUISRCH) - Telephone, Email, Additional ID
- Block Registration Control Page (SFABLCK)
- Student Block Pre-Assignment Page (SFABLPA)
- Block Rule Definition Page (SFABRDF)
- Registration Additional Fees Page (SFAEFEE)
- Enrollment Status Control Page (SFAESTS)
- Registration Fees Min/Max Charge Control Page (SFAFMAX)
- Registration Minimum Maximum Hours Page (SFAMHRS)
- Pre-Assigned Block Configuration Page (SFAPABC)
- Registration Priority Control Page (SFARCTT)
- Student Course/Fee Assessment Query Page (SFAREGF)
- Registration Query Page (SFAREGQ)
- Registration Fee Assessment Refund by Total Rules Page (SFARFND)
- Student Registration Group Page (SFARGRP)
- Third Party Registration Time Controls Page (SFARGTC)
- Registration Error Messages Page (SFARMSG)
- Registration Permit-Overrides Control Page (SFAROVR)
- Course Registration Status Page (SFARSTS)

- Reserved Seats Waitlist Priority Management Page (SFARWLP)
- Student Registration Permit-Override Page (SFASRPO)
- Student Course Registration Audit Page (SFASTCA)
- Time Status Rules Page (SFATMST)
- Student Withdrawal Page (SFAWDRL)
- Waitlist Priority Management Page (SFAWLPR)
- Cross List Waitlist Priority Management Page (SFAXWLP)
- Student Block Selection Inquiry Page (SFIBSEL)
- Student Registration Group Query Page (SFIRGRP)
- Student Withdrawal Query Page (SFIWDRL)
- Waitlist Notification Error Query Page (SFIWLNE)
- Waitlist Notification Query Page (SFIWLNT)
- Registration Section Query Page (SFQSECM)
- Registration Course Query Page (SFQSECT)
- Non-Person Search Page (SOACOMP)
- Curriculum Rules Control Page (SOACTRL)
- Hold Information Page (SOAHOLD)
- Person Search Page (SOAIDEN)
- Person Search Detail Page (SOAIDNS)
- Open Learning Section Default Rules Page (SOAORUL)
- Persona Rules Page (SOAPERS)
- External API Connection Information Page (SOAREST)
- Student Centric Period Term Control Page (SOASCPT)
- Term Control Page (SOATERM)
- Web Display List Customization Page (SOAWDSP)
- Overall Page and Field Configuration Page (SOAWSCR)
- Waitlist Automation Term Control Page (SOAWLTC)
- Alternate Personal Identification Number Page (SPAAPIN)
- Persona Validation Page (STVPERS)
- External API Information Validation Page (STVREST)
- Course Registration Status Code Validation Page (STVRSTS)

- Overall Configurable Page Field Validation Page (STVWSFD)
- Overall Configurable Page Validation Page (STVWSPG)

Configure Page Components

You can use this tool to customize delivered user interface common components and add new common components to the Registration administrative pages. You can hide fields that are not required, change the field type of delivered fields (within the bounds of the database functionality), and change the behavior of fields. For more information, refer to the *Banner Extensibility Configure Page Components Tool for ZK Pages for Administrative Users 9.0*.

Tool	Version	Availability
Configure Page Components - Administrative Applications	9.0	Embedded

Domain Extension Tool

You can use this tool to make changes to the domains without modifying the source code. It is recommended that this tool is used by experienced developers who are familiar with the nomenclatures and concepts used in Banner 9.x development. For more information, refer to the *Domain Extension Tool for Developers Handbook 9.0*.

Tool	Version	Availability
Domain Extension Tool	9.0	Using Client Git Repository

Use the following steps to access extensibility tools user documentation on the Ellucian Support Center:

1. Go to the Ellucian Client Support web site:
<http://www.ellucian.com/Solutions/Ellucian-Client-Support>.
 2. Click **Ellucian Hub** to log in to the Ellucian Hub.
 3. Choose the Ellucian Download Center application.
- or

4. Choose the Ellucian Support Center application.

Limitations of page customization

Here is a list of Configure Page Components tool known issues.

- When radio group button labels are modified, the information text for each option defaults to *Null*.
- The **Insert** button disappears when the first column of the Listbox is hidden using the Configure Page Components tool.
- The width attribute of a text box in the tool should be disabled until the **Multiline** checkbox is selected, and the number of lines is greater than or equal to 1.
- When you press the Alt+U shortcut key multiple times, multiple Configure Page Components tool windows are opened.
- In Data Masking, the component in the Listbox is never marked as *masked*.
- When the Multiline box is converted to a Text Box, it always reverts back to a Multiline box.
- When you click the **Close** button in the Configure Page Components tool, the warning pop-up message does not appear.
- In all browsers except Chrome, for the Arabic locale (Right To Left) in the tool, when you select the **Item** section, the arrow disappears for all records when expanded for one record.
- When you press the **Escape** button, the Configure Page Components tool does not close.
- A warning message appears when you click on the **Cancel** button, even when there has been no change in the Configure Page Components tool.
- The **F9** key does not work for the newly added Lookup fields.
- When you click on the **Revert All** button, the **Added as** field does not revert back to the text *Baseline*, until the page is reloaded.
- Changes are not reflected in the Configure Page Components tool until it is reloaded.
- The spinner number cannot save a Null value in the Configure Page Components tool.
- You cannot make the Read Only fields editable using the Configure Page Components tool.