**UPDATED: MAY 3, 2007** 

User Manual for Advisors

# HuskyNet (Banner)

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### **Overall Tips**

#### What is HuskyNet?

- HuskyNet is HBU's name for the computer application named Banner. Banner is an integrated computer system which allows HBU to use one computer system for all necessary computer functions (such as maintaining student records, and payroll and accounting functions).
- SunGard HE is the company who supplies Banner to us.
- **Banner has two applications** HuskyNet or Self Service Banner (SSB) and Internet Native Banner (INB). The user will find information both Banner applications. However, how you find the information and how it looks is different.
  - For example:
    - Only persons teaching a class can ENTER GRADES in SSB
    - Only academic advisors and academic deans can APPROVE COURSES in INB

#### What are my usernames and passwords?

- Each user has a username and password for INB and a ID # and Pin # for SSB
- Complete the HBU Banner Account Request Form and submit it to ITS at least seven (7) working days before Banner access is needed. Find this form on the portal.
  - To find the form on the portal (my.hbu.edu  $-\log in$ ):
    - Click HBU Forms
    - Click Information Technology Services
    - Click HBU Banner Account Request form
    - Print form
  - Complete Page 1 of the request form; ask your College Dean's Assistant for assistance.
  - On Page 2 in the Banner Student section, check "other" and add "Need modification access to SFASRPO"
- Make sure to attend a Banner training session offered by the Office of Academic Advising. Please call to see when the next training session is offered.

#### Ways to find HuskyNet

- Portal
  - Go to https://my.hbu.edu on the internet and log in (see Figure 1.1)
  - See middle of portal for Internet Native Banner (INB) and HuskyNet (SSB)
    - No need to log into SSB

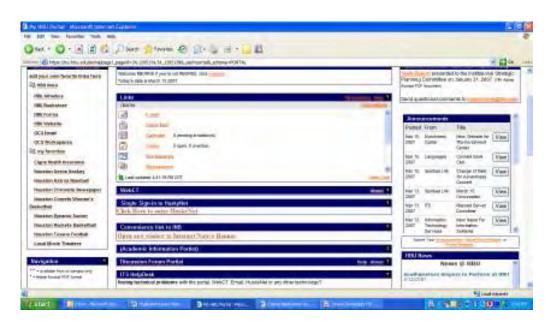


Figure 1.1 Portal screen (see "Click Here to enter HuskyNet" in center of screen)

- Internet
  - Go to http://bannerlinks.hbu.edu (see Figure 1.2)
  - o Once you have entered internet address, you will see a blue screen
    - INB on left side
    - SSB on right side
    - Always click PRODUCTION INSTANCE (PROD); the other options are used for testing and training proposes and is not "live" information. PROD means what is currently in production (current information).



Figure 1.2 Banner Links screen

#### Forgot your Passwords?

• Go to <u>https://www.hbu.edu/username</u> (user must reset password)

#### **User Tips**

- "Term" is the period of time in which classes are in session. For example, a quarter or semester.
- Use the Wildcard symbol (%) for name searches (example: search for Daniel Vaughn, type in "Vau%" to search for all the last names which begin with Vau)
- Provisional Admits...
  - are limited to register for 9 hours maximum (minimum of 8 hours) their first quarter.
  - o pay non-block rate for one quarter.

#### **Definitions**

Program: The goal or objective which measures student progress. A degree is a program (ex: BBA, BS, BA, BSN, ADN, BM, BGS).

Areas: Subset of a program's requirements (ex: core requirements, major requirements).

Compliance: Tracking student progress toward a program/degree.

Term: The defined time classes are in session; for example, a quarter or a semester.

# Section

## **Tips when Advising Students**

- Start with SSB
  - o Look at:
    - test scores
    - HBU grades (transcript)
    - transfer articulation
    - holds
    - current schedule (if appropriate)
    - other as needed
- End with INB

Approve 6 to 10 courses (in SFASRPO) Smith College courses and/or your academic discipline (give students as many choices as possible).

Approve Smith College and YOUR academic discipline only.

- If an advisor only approves 4 courses and the student want to take 4 courses and all the sections are filled or are time conflicts, then the student must return to you or another advisor to approve more courses. Save the student a trip and your time by approving as many courses as possible.
  - Provisional Admits may only register for 8-9 hours (new freshmen admitted provisionally)

# **Student Issues**

- All students must register using HuskyNet (aka Self Service Banner). Student may find HuskyNet by:
  - o Logging into the Portal
  - See the Office of the Registrar's website (http://www.hbu.edu/registrar)
- Students may see the Office of the Registrar for SSB User ID (a.k.a. H#) & Pin.
- If student is having problems with technology, please have him/her do one of the following:
  - o Call: 281-649-3410
  - o Visit: 122 Hinton Center (ITS Helpdesk)
  - o Email: <u>helpdesk@hbu.edu</u>
  - Submit online: From Portal chose Technical Support Request underneath Campus Services
- Students may email the Office of the Registrar for registration assistance
  - o <u>registrar@hbu.edu</u>
- Some new student (specifically transients) may need assistance finding open courses and building their schedules.
  - As a tool, use the Course Selection Worksheet located on the Office of the Registrar's webpage (http://www.hbu.edu/registrar/).



# **Self Service Banner (SSB)**

#### Version 7.3

- Once the uses logs into SSB, you will see Figure 3.1. Click Faculty & Advisors.
- To view information important to individual faculty members, (your schedule, roll for each class, etc.), use Faculty Services screen (see Figure 3.2).

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Figure 3.1 – Main Menu screen

#### **User Tips**

<u>Make sure to select appropriate term</u>; after term is initially selected, it will stay that term until user changes it

- Make sure to select the current term when using SSB
- If in between terms, select upcoming term.

<u>Make sure to select appropriate student</u>; SSB will stay in each student's record until you chose another student

- All directions in this section assume the user has selected appropriate term and student.
- If you enter SSB from the Portal, you will not need to log in.
- If you do not enter from SSB and enter from Banner Links, please do the following:
  - Log into SSB (you will be asked to change your Pin # and security question if using for the first time)
    - Enter User ID#
      - This is your Banner ID # which begins with an "H"
    - Enter Pin #
      - This is your birth date (mmddyy) unless you change it. For example, if your birthday is May 22, 1955, enter 052255

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Figure 3.2 – Faculty Services screen

#### • Screen names and functions:

- Student Information Menu-click to view student information and advisee list
- o Term Selection-make sure to select the appropriate term
- CRN Selection-use CRN to select course you are teaching for the below information
- Faculty Detail Schedule-schedule of courses you are teaching for term
- Week at a Glance-weekly schedule of courses you are teaching
- Detail Class List AND Summary Class List-list of students in your classes
- Final Grades-submit final grades here
- Look Up Classes-not activated
- o Faculty and Advisor Security Information-user information
- o Active Assignments-courses you are teaching
- Assignment History-courses you have taught since Banner was implemented

- o Class Schedule-list of all course taught for the term
- o Course Catalog-not activated
- o Syllabus Information-not activated
- o Office Hours-not activated
- To view course(s) you are teaching & course enrollment:
  - Click Faculty Services
  - Click Faculty Detail Schedule
  - Click Classlist OR click Detail Class List
- To view course & enrollments for class you do not teach:
  - Obtain CRN # before proceeding (e.g., look up in Class Schedule)
  - o Click Faculty Services
  - o Click CRN Selection (select Term if needed)
  - Click Enter CRN see the "Enter CRN Directly" link located bottom/center
  - Enter desired CRN
  - o Click Summary Class List
- **To view student information** (list of your advisees, and student's schedule, transcripts, holds, etc.)
  - o Click Faculty Services
  - Click Student Information Menu (see Figure 3.3)
  - o Click ID Selection
  - Enter H# (use capital H) or last and first name; click Submit & select appropriate student
  - You are back to the Student Information menu (see Figure 3.3)
    - SSB now knows the name of the student you want to view information

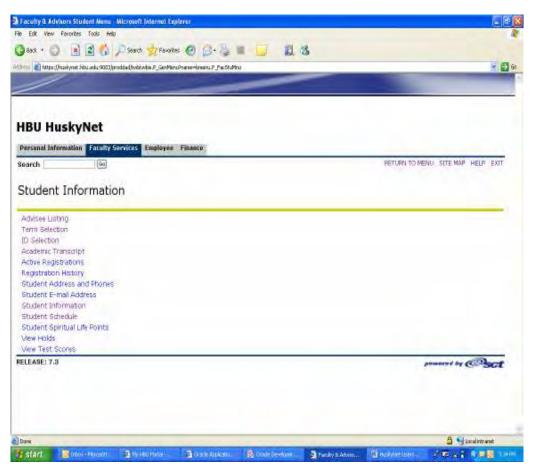


Figure 3.3 – Student Information Menu screen

#### • Screen names and functions:

- Advisee Listing-list of advisees assigned to you
- o Term Selection-make sure you select appropriate term
- o ID Selection-select a student to review information
- Academic Transcript-academic history of student; includes transfer evaluation
- o Active Registrations-courses student is currently registered
- Registration History—all courses student has registered for using HuskyNet
- Student Address and Phones-permanent/physical address or phone
- Student E-mail Address-HBU email address
- Student information-major(s), advisor(s), student status, degree/program seeking, etc.

- Student Schedule-courses student is currently registered (time, days, location)
  - Hint: When searching for two or more subjects (example, searching for all the Psychology and Sociology courses offered), highlight Psychology. Then press the Control Button (CTRL on your keyboard) and scroll to the next course, Sociology, and click to highlight. Then click Submit and the use will see all the course offerings for Psychology and Sociology.
- Student Spiritual Life Points-see below for directions
- o View Holds-if a student has a hold, it will be listed here
- View Test Scores-ACT/SAT scores

#### What to view

\*\*You will need to select a term before you view any of the below information\*\*

- **To view SLP points** (Advisors may enter from HuskyNet, however, HuskyNet does not keep track of points; another program tracks points.)
  - o Click Faculty Services
  - o Click Student Information Menu
  - o Click Student Spiritual Life Points
  - Enter student ID (H#) OR student name (See Figure 3.4)
  - o Click Submit

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Figure 3.4 Student Spiritual Life Points

- To view a student's transfer equivalents (articulation):
  - o Click Faculty Services
  - o Click Student Information Menu
  - o Click ID Selection and select student
  - Click Academic Transcript
  - Select All Levels for Transcript Level & Advising for Transcript Type; then Click Display Transcript
    - Show all course student has taken at HBU, term GPA, overall GPA, credit hours taken, etc
    - Transferred Courses: If the course is articulated as an elective (ELEC), see INB for the rubric and name of the course completed at the student's former institution (see Section 5 for further instructions).

#### • Is student a Provisional Admit?

- Click Faculty Services Menu
- o Click Student Information Menu
- o Click ID Selection
- Enter H# or cast and first name; click Submit & select appropriate student
- o Click Student Information
  - See Admit Type
  - "Committee" means student was admitted by the Admissions Committee (a.k.a. Provisional Admit);
     "Standard" means student was not admitted by the Admissions Committee (a.k.a. regular student).
- To view a list of your advisees:
  - Click Student Information Menu (select different Term if needed)
  - Click Advisee Listing (these students are your assigned advisees who have registered for the indicated term)
    - If a students needs to change their major(s) and/or advisor(s), have them see the Office of Academic Advising
- To view students who are not your assigned advisees:
  - o Click Student Information Menu
  - o Click ID Selection
  - Enter H# or last and first name of student; make sure All is checked in Search Type; click Submit & select appropriate student

#### **Grade Submission**

Only for those who are teaching classes.

Make sure you choose the correct term.

- Step 1 Log in SSB; click Faculty Services menu
- Step 2 Click Final Grades
- Step 3 Select Term using dropdown box
- Step 4 Select CRN/Course using dropdown box
- Step 5 Select Grade from dropdown box
  - Leave blank the following: Last Attend Date & Attended Hours
  - Student Withdrew (indicated with a W) Write the last attended date in Last Attend Date box (see Step 7) on grade sheet.
  - **P/F Option** Assign A, P, F, NR, IS, IU only.
  - Assigning NR Requires submission of a Grade Change Form.
  - Grade Change Including NRs Complete Grade Change Form (see College Dean or Registrar's Office for form) and deliver to Registrar's Office. <u>Each faculty</u> <u>member changing a grade MUST submit this form to</u> <u>Registrar's Office in person</u>.
  - Assigning F, IS, IU, NR Enter the last date attended in the Last Attend Date box online and submit the completed Assignment of Incomplete Grade Form (see College Dean or Registrar's office for the form). Deliver completed document to Registrar's Office with grade sheet (see Step 9).
  - Labs Do not enter grades for Lab; or enter a Z as a grade. Grade is reflected in the lecture.
  - **Team Taught Courses** Only primary instructor can enter grades for courses which have more than one instructor.

Step 6 Click **Submit** to save.

- Click Submit as many times as you wish.
- If Submit is not clicked, information entered is not saved.

Step 7 Print a hardcopy and sign the document. (Go to File and select Print)

 Sign the hardcopy at the bottom of the paper; there is not a box or space for your signature.

Step 8 Exit when finished (upper right corner).

Step 9 **Deliver signed grade sheet** to Registrar's Office by 4pm on date grades are due.

#### TWO IMPORTANT ITEMS:

<u>Graduating candidate</u> grades are due **before** regular grades. Faculty will assign only these students grades on the day required. Once you have entered the grade, click Submit and print a copy. Sign and take to Registrar's Office.

Once signed <u>grade sheets</u> are delivered to the Registrar's Office, do not change grades in SSB. If you need to change a grade, complete the Grade Change Form and submit form in person to the Registrar's Office.

# Section

# **Internet Native Banner (INB)**

#### Version 7.3

#### Log In

- Enter Username and Password
  - o Put in PROD in Database or leave blank
- Figure 4.1 is a user's starting point in INB

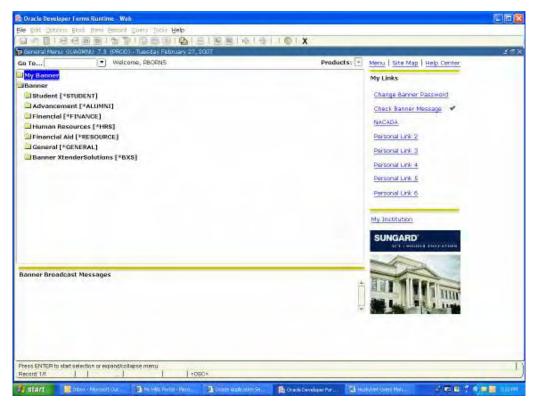


Figure 4.1 INB starting point

#### Navigation

- A Banner <u>form</u> is a screen which allows a user to view information stored in Banner
  - o Every form has a 7-character form name
    - Example: SFASRPO course approval form
- Click the **X** in the right hand corner to move from screen to screen
- Parts of a form: (see Figure 4.2)
  - To move from block to block, put curser in needed box (referred to as "next block")
  - Key Block-top block which shows viewer identification information (ID) and term
  - o Information Block-shows view information needed
    - Examples: General Learner and Curricular Summary are each blocks
  - Field-enter a query or change information
    - ID is a field, Term is a field
    - Use arrow to select information or type in information
      - Example: type in 200750 (Spring 2008) for term or use the arrow box to select Spring 2007-08
  - Record-group of fields
    - Typically, there is one record for each term a student is at HBU
    - See Figure 4.2. Use the scroll bar on the left side of General Leaner to see additional records.
  - o Navigation Block-icon located on the tool bar
    - Buttons which help the user navigate:
      - See the set of buttons under the File Edit Options line
      - Placing the curser on each button shows the function of the button.

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Figure 4.2 SGASTDN form

#### **User Tips**

- If system freezes, close out and log in again.
- If a student wants to attend HBU a term different than indicated on SGASTDN, student MUST see Bob Tripple in Office of Admissions (x3290). For example, if student was admitted for Fall (check Term in SGASTDN), and now wants to come Summer, send student to <u>see Bob Tripple immediately</u>. Bob must change student's record to reflect the change in term. Do not approve courses until student has returned from seeing Bob.
  - If you cannot enter ADAP in SFASRPO, student has not been admitted for that term. See above.

#### **Banner Version 7.3 Enhancements**

- <u>DO NOT</u> close the blank gray web browser window that is behind the INB login screen. This will close your INB session.
- See Broadcast Message (main page; bottom of screen) for important messages regarding Banner.
- See Personal Links (main page; right side) to add your own web links. Directions to add personal links
  - Access GUAUPRF
  - Go to the "My Links" tab
  - o Edit the personal link description
  - Edit the personal link URL
  - o Exit and log back into INB

#### **Using "Term"**

- Enter year and term (quarter or semester) for each record using this format: YYYYTT
  - YYYY = Academic Year 2006-07 (use 2006 all year): Academic Year 2007-08 (use 2007 all year)
    - TT = Term
      - 10=Summer (20 not used)
        - 30=Fall
        - 40=Winter
        - 50=Spring
- Examples:
  - o 200610 = Summer 2006 in the Academic Year 2006-07
  - 200630 = Fall 2006 in the Academic Year 2006-07
  - o 200730 = Fall 2007 in the Academic Year 2007-08
  - o 200750 = Spring 2008 in the Academic Year 2007-08

#### **List of Regularly Used Forms**

\* = forms most used by advisors

- \*SFASRPO <u>approve courses for Smith College & your academic</u> <u>discipline only</u>; view student schedule
- \*SAADCRV view acceptance status, majors, test scores, high school attended, attended other institutions, admit term
  - o Acceptance Status:

Accepted Provisional = freshman

Accepted Probation = transfer

Accepted Unconditional = "regular" student

- SFASLST view students in your class
- SGASTDN view students' major(s) and advisor(s); view FERPA notation (see screen shot later in this section)
- \*SPAIDEN address, phone numbers (primary, cell, etc.)
- \*SGAADVR views advisor(s)
- SIAADGQ views courses you teach for the term; view courses other teach for the term
- SOAHOLD view holds
- SOATEST view test scores (ex: ACT, SAT)

#### **Approving Courses for Students – SFASRPO**

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Figure 4.3 SFASRPO screen

- Go to SFASRPO
- Enter Student ID/name & term
- Enter ADAP in Permit
- Enter subject rubric (example, ENGL, BIOL, SOCI); click in the box to see list of course names, if needed.
- Enter course number (example: 1313, 1323, 3344)
  - <u>Approve courses for Smith College & your academic discipline</u> only
- No need to enter CRN
  - School Music advisors may need to enter CRN for individual lesson(s)
- Next block to see courses a student has already registered.

#### **Using SGASTDN**

• Use screen to view student's major(s), advisor(s), degree seeking, term entered, last term attended, FERPA notation, etc.

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Figure 4.4 SGASTDN form

- When viewing major(s) and/or advisor(s) change, see the "top" record for most current information
  - Example: student submits Change of Major and/or Advisor form during 200630 (Fall 2006); A new 200640 record (Winter 2006) is added to indicate new advisor.
- To view a comment which the OAA or Registrar's Office might have made:
  - o Select Options (top right)
  - o Select Student Comments
  - This form allows the user to view comments, such as a **FERPA** form on file in Registrar's Office or date advisor change was made

#### **View Student Schedule (3 options)**

- SFASRPO (2<sup>nd</sup> part of screen)
- SGASTDN-select Options (at top), select View Student Schedule
- SFAREGS (at Distribution Parameters screen, Click black X)
  - Click drop down box; this will show what the codes mean (Click the drop down box for Status to see code. For example, RW means Web Registered.)

#### View student's course equivalents (articulation)

- Go to: SHATRNS (see Figure 4.5)
- Enter H# or name
- Click drop down box for Transfer Institution Number and select an institution (double click in box)
- Put "1" in Attendance Period Number (1 = undergraduate)
- Go to next bock
- Click Option (top of form)
- Select Transfer Course Detail
  - Use side scroll bars to view courses completed at that institution and the HBU equivalent course.
  - Use Rollback button (top of screen) to get back to starting point and select another institution number if needed

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Figure 4.5 SHATRANS form

# Has student filed degree plan? View HBU completed courses & articulated courses

- Go to: SHADEGR (see Figure 4.6)
- Enter H# or name
- Put "1" in Degree Sequence & next block
  - If a student has a Hold, user will not be able to next block and view information.
- See Outcome Status this will show if student has filed degree plan
  - SO = student not filed degree plan (Sought)
  - $\circ$  AP = applied for graduation
  - DP = degree plan filed in the Office of the Registrar
- Click drop down box in Outcomes Status to view other options
  - Click Institutional Courses view courses student has completed at HBU (term, rubric, course name, hours, grade, etc)
  - Click Transfer Courses view articulated course (term articulated, articulated HBU course or Transfer Elective Credit, hours)

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Figure 4.6 SHADEGR form

#### **Practice**

- After logging in, put curser in "Go" box & type form needed (example: SFASRPO to approve courses; see Figure 4.2)
- Hit Enter (on the keyboard)
- Enter student ID (H#)
  - Or, tab to the next field and enter in last name or part of last name (example: White, Ray) Use the Wildcard symbol (%) if needed (example: Whi%, r%). Hit Enter on keyboard.
  - Or, use the search button function
- Enter term (example: 200750 for Spring 2007-08)
- HINT: Use TAB key to move from field to field
- Use curser to get to the next block of information

#### **My Links**

- See the first Banner screen on the left side; you have the option to add personal web links. To set-up, do the following:
  - o Click Personal Link 1
  - o Click My Links
  - See the Description block "Enter the description for the "My Personal Link 1" and enter the name of the web link in the User Value block.
  - See the Description block "Enter the URL or Banner object for the "My Personal Link 1" and enter the web address (include www but not http//:) in User Value.
  - o Click Save (upper left hand corner)
  - Exit out of INB and log in again....see the links on the left side.

#### Using "My Banner"

- Allows user to click on needed form, rather then typing each form name. To set-up, do the following:
  - o Double click My Banner folder
  - o Double Click GUAPMNU
  - In the upper left hand side drop down box, select Form and click on the green arrows button (Sort Object List button). This will sort the form names in alpha order.
  - Find form(s) on left side and move (using the right arrow key) to right side. Make sure to double click needed form to move to right side. (To remove a form, click form on right side and click left arrow.)
    - Tip: Use the control key to highlight more than one form name before moving to right side.
    - Tip: The list of long; don't get discouraged when trying to locate the form you want.
  - When finished, SAVE. (SAVE icon-top left corner)
  - o Exit out of Banner (this step is important)
  - o Log into Banner
  - Open My Banner see the forms you selected

#### **Using Quick Flow**

- Quick flow is a method to move from form to form without typing each form name. A "flow" is set-up for the following functions:
  - FADV = advising a new freshman
  - To Start a Quick Flow, you have two options:
    - #1 a. go to File (top of screen on the left side)
      - b. select Quick Flow
      - c. select name of Quick Flow
      - d. click Start

OR

- #2 a. go to General Menu (what you first see when you log in)
  - b. type Quick Flow name (ex: FADV)

# Section

## **Course Articulation**

#### **3 options**

Students who transferred hours to HBU <u>before Summer 2006</u> have had their transfer hours articulated; this information is located in Class Mate. Advisors may view and print this information as needed. Class Mate is on the Portal.

<u>Starting Summer 2006</u>, new/entering students have had their transfer hour articulated in Banner. See below for three options to view their transfer articulations.

#### • #1 Paper Copy

• Each Dean's Assistant will be sent transfer articulation paper copies for advisee with majors in that particular college.

- #2 INB
  - INB shows courses completed at other institutions. If a course has an HBU equivalent, both courses and grade are noted (course from former institution and HBU).
  - Option of viewing two screens: SHATRNS (see Section 4 for further instructions)
  - Steps SHATRNS (see Figure 4.5)
    - Go to: SHATRNS
    - Enter H# or name
    - Click drop down box for Transfer Institution Number and select an institution (double click in box)
    - Put "1" in Attendance Period Number (1 = undergraduate)
    - Next Bock
    - Click Option (top of form)
    - Select Transfer Course Detail
      - Use side scroll bars to view courses completed at that institution and the HBU equivalent course.
      - Use Rollback button (top of screen)

#### • #3 SSB

- SSB allows you to see only courses which have been articulated at HBU.
- o Steps:
  - Click Faculty Services Menu
  - Click Student Information Menu (select current term if needed)
  - Click ID Selection
  - Click Academic Transcript
    - If the course is articulated as an elective (ELEC), see INB for the rubric and name of the course completed at the student's former institution.

# Section

# **Class Schedule**

#### 2 options

- SSB (live)
  - o Get to HuskyNet link (use Portal)
    - Log in to SSB
    - Click Faculty & Advisors
    - Click Class Schedule (select Term if needed)
    - Input Subject and Course Number (see Figure 6.1) & Submit
    - Review course offering

Art Appreciation - 5441 - ART 2342 - 01

5441 = CRN (Course Reference Number -- number which corresponds with the course and when it is offered; each course will have a different CRN each term course if offered)

01 = section of course (the course could be offered more than once)

- Click <u>blue underlined</u> course to see number registered in course and number of open seats
- Hint: When searching for two or more subjects (example, searching for all the Psychology and Sociology courses offered), highlight Psychology. Then press the Control Button (CTRL on your keyboard) and scroll to the next course, Sociology, and click to highlight. Then click Submit and the user will see all the course offerings for Psychology and Sociology.

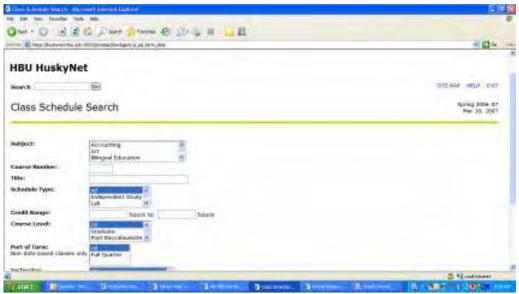


Figure 6.1 Class Schedule screen

- o Go to HuskyNet link from Portal (see left bottom of Portal)
  - Click HuskyNet
  - Do NOT log in to SSB
  - Click Class Schedule

- HBU website or portal (updated periodically)
  - o <u>http://www.hbu.edu</u> or <u>http://my.hbu.edu</u>
  - Click Academics
  - o Click Course Catalog and Calendar
  - o Click Academic Class Schedule (see Figure 6.2)



Figure 6.2 Class Schedule on HBU website

#### Section

# CAPP (Curriculum, Advising and Program Planning)

#### **Overview**

Using CAPP allows the user (such as advisor, administrator, or student) to track a student's progress toward reaching a goal of attaining a degree from HBU. At HBU, this tracking is referred to as the degree audit. CAPP uses the term <u>compliance</u> as the tracking of a student's progress toward graduation. More specifically, "compliance processing takes the student's academic information and measures it against the requirements" for the degree and major(s) at HBU.

"CAPP allows faculty advisors more time for advising, rather than spending hours plotting out a student's progress toward completion of a goal. "What will it take for me to graduate? Am I on schedule? What if I were to change my major?" These are questions that are commonly asked by students; questions that CAPP can handle for you. CAPP is designed with the student population in mind. Students can obtain quick and accurate information that shows just where they are on their path to completing their goal."

The information you receive from CAPP is called the degree audit evaluation/compliance, and includes University requirements (such as Smith College Core, SLP points, etc.) and requirements in each major (such as course required, portfolio requirement, etc.).

More coming.....

Quotes from: Banner Student CAPP Training Workbook, May 2006, Release 7.3



# **My Notes**