

Creating & Assigning Members of Faculty

Banner 8 User Guide

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Creating & Assigning Members of Faculty

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Refer to this tutorial to learn how to create an academic staff, or departmental administration staff, member record in Banner. This is necessary to enable mark-entry via the Self-Service Gradebook system; it is also required to gain access to the Student Information tab on Campus Connect.

Banner forms:

| FORM | FUNCTION |
|---------|---|
| SPAIDEN | General Person Identification Form Person's ID, alternate name and address details |
| GOAMTCH | Common Matching Form Used to check for duplicate person records. |
| SIAINST | The Faculty/Advisor Form Used to enter and maintain the faculty information which changes over time. The key to the form is the faculty member ID and the effective term for which the data is to be viewed or updated. Attributes on this form will determine whether a member of staff has access to self-service functionality via the portal including Gradebook and the student details channel. |

Pre-requisites to this tutorial:

- Name (and Banner ID, if applicable) and department of new staff member.

1. CREATING A NEW PERSON

If a member of staff has previously been a student at Royal Holloway they will already have a General Person Record and a duplicate MUST NOT be created. You must always complete the duplicate checking procedure when setting up a member of faculty.

- 1.1. Go to **SPAIDEN** (Figure 1) and click the *Generate ID* icon (Figure 1, Box 1).

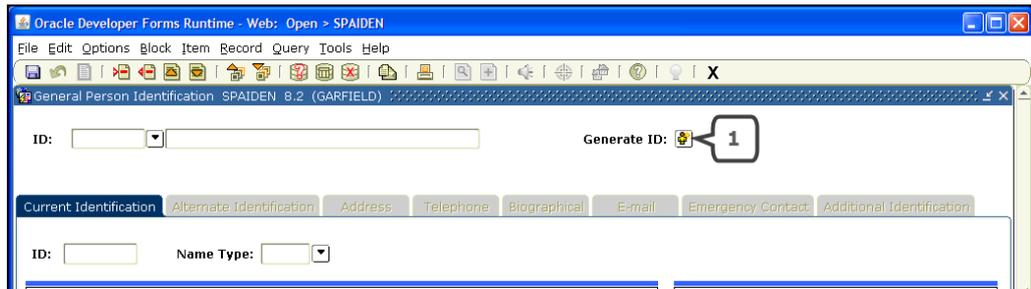


Figure 1

- 1.2. The form **GOAMTCH** (Figure 2) is displayed.

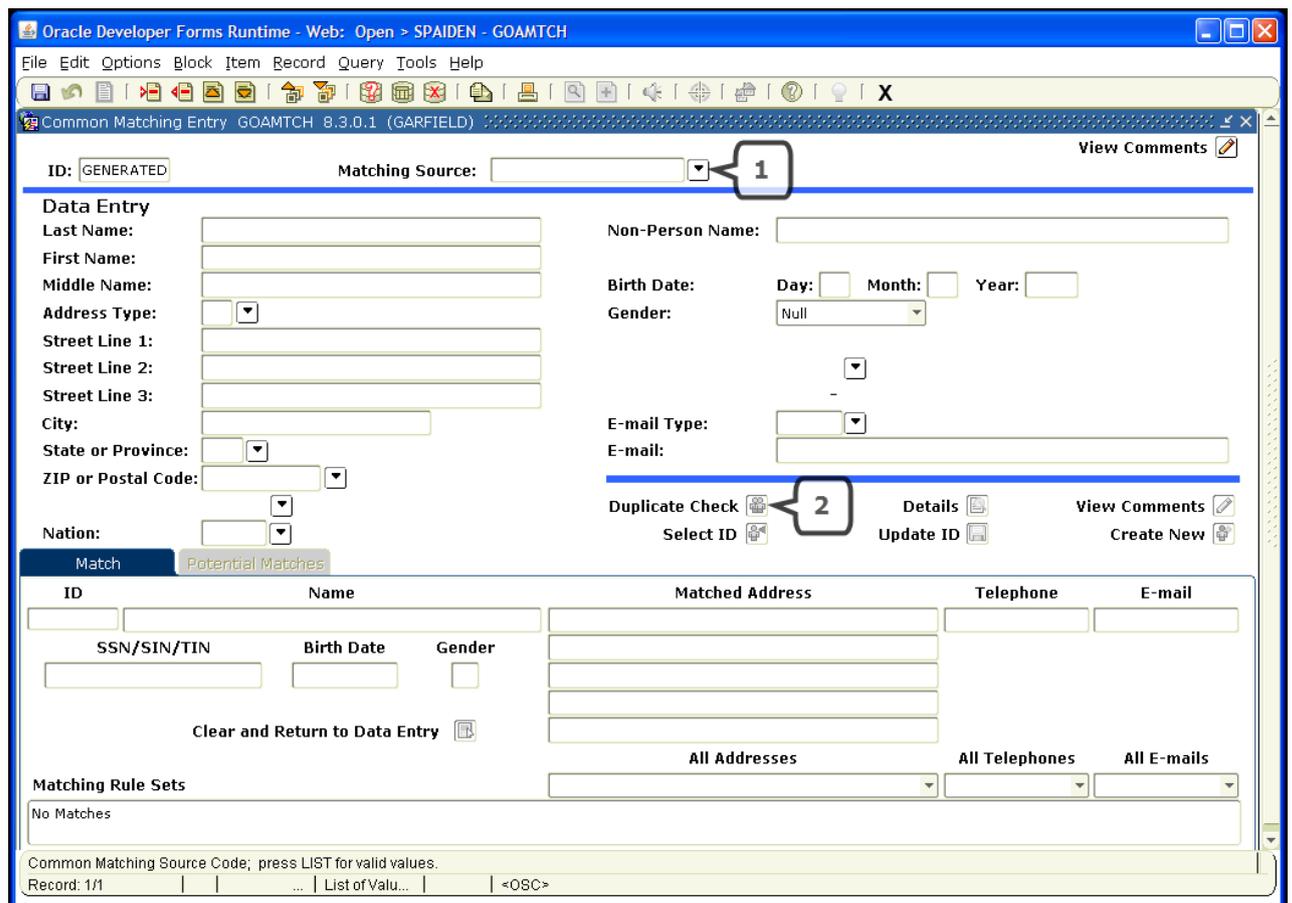


Figure 2

- 1.3. Select the appropriate *Matching Source*, in this case select **FACULTY** (Figure 2, Box

1).

1.4. *Block down* and enter the last name and first name of the member of staff.

Notes:

- Do not enter any wildcard characters in the fields as **GOAMTCH** automatically does a wildcard search e.g. if you enter 'Jo' it will find 'Jonathan', 'John', 'Josephine', etc.
- You must enter at least the 1st letter of the first name, or Banner will not find any results for the surname.
- Matching checks for transposed first and last names, e.g. if you enter John Lee, and Banner contains a 'Lee John', then Lee John will be in the Potential Matches list.

1.5. Click the *Duplicate Check* icon (Figure 2, Box 2) to run the check (or press F10).

1.6. If a window with the message "No matches found, create as new?" appears (Figure 3) the rules cannot find any match, either exact or potential. *Click* Yes and go to step 1.10.

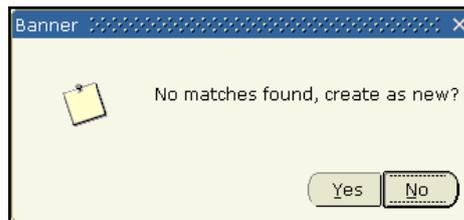


Figure 3

1.7. If the Common Matching rules find an 'Exact Match', information is displayed in the **Match** tab (Figure 4, Box 1).

Notes:

- This **does not guarantee** that the Banner ID is actually the same person: just that the rules being used have found a match.
- The information in the Match tab **must be checked** – see 1.9.

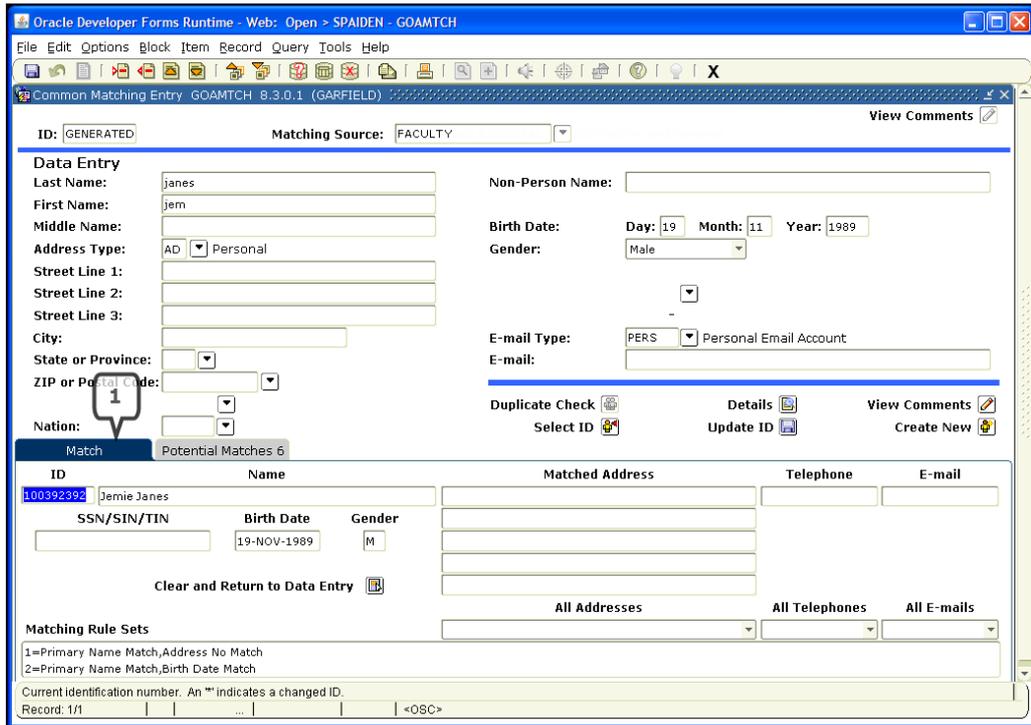


Figure 4

- 1.8. If Common Matching finds one or more Potential matches (or more than 1 Exact match), their Banner IDs and data are displayed in the **Potential Matches** tab (Figure 5, Box 1).

Potential Matches are **NOT** displayed in 'best fit' order, so scroll down to check all the suggestions. An exact match might be the last ID listed.

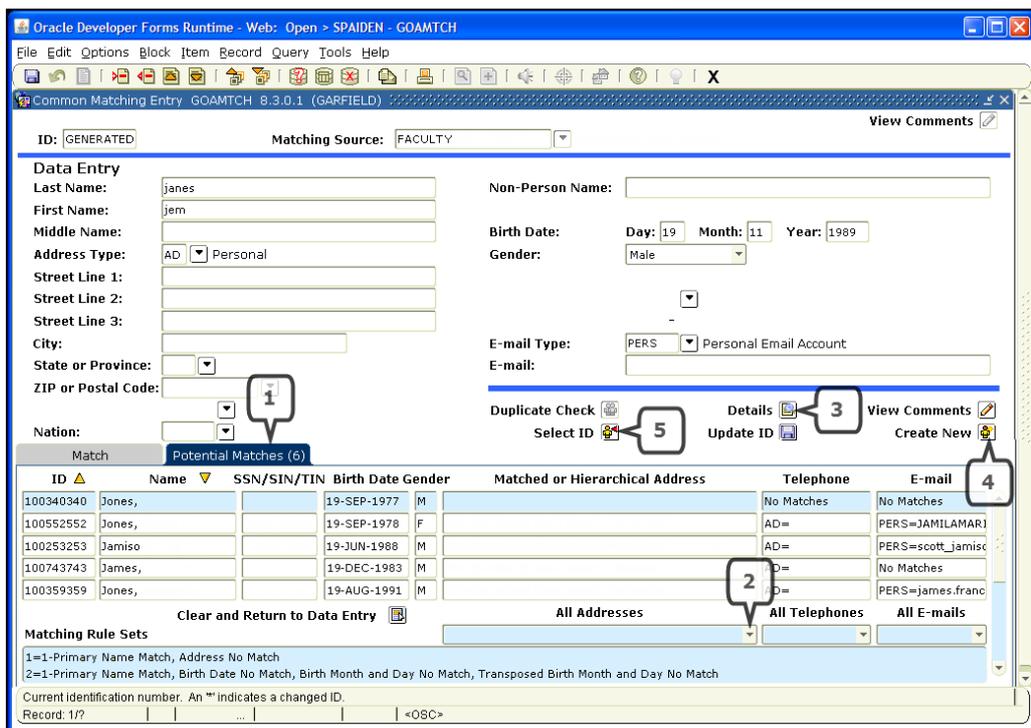


Figure 5

Note:

- An asterisk next to a name or address (in Potential Matches) means it is a previous or overwritten name or address, so click 'Details' then 'General Person Identification' to check the Alternate Name and Address details in SPAIDEN.
- 1.9. You will need to decide if any of the suggested exact or potential matches are indeed the person you are trying to create as a member of Faculty.

If you want to investigate further you can highlight (single-click) an ID in the Match or Potential Match tab, then do one or more of the following:

- Click the drop-down arrow next to 'All Addresses' (Figure 5, Box 2) to view all addresses for that person. The same function is available for 'All Telephones' (This is the only way to view a person's telephone on this form) or 'All Emails' to display relevant data for that person.
- Click the Details icon (Figure 5, Box 3). This displays a list of useful forms e.g. Faculty / Advisor Information. Click on the description to access that form to get more information about the suggested duplicate. Close the form to return to GOAMTCH.
- Select "System Identification" to see if the suggested duplicate is a recruit and/or applicant and/or student and/or faculty member on form GUASYST.

If you decide the person you are trying to create does not match any ID in Match or Potential Matches tab, select the 'Create New' icon (Figure 5, Box 4). This will create a new Banner ID and General Person Record.

If you decide the input data does match one of the IDs in Match or Potential Matches, highlight that ID (single-click) then select the *Select ID* icon (Figure 5, Box 5) which will take you back into **SPAIDEN**.

- 1.10. Following clicking 'Yes' to Create New a message window is displayed describing the results (based on data entered in GOAMTCH). Select 'OK' to return to **SPAIDEN** (Figure 6).

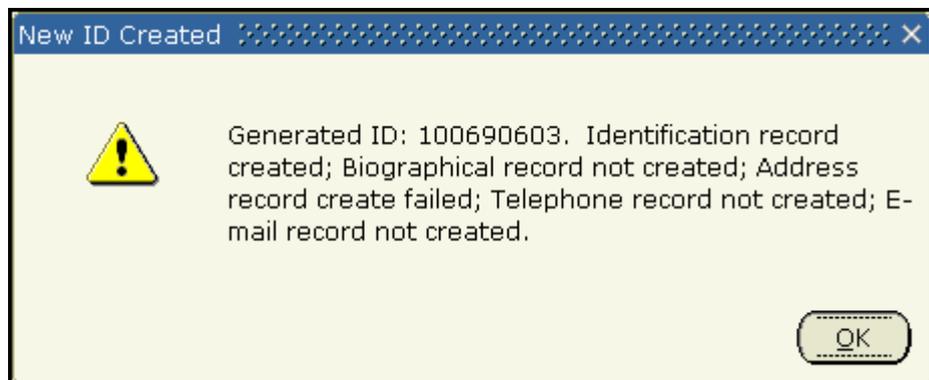


Figure 6

- 1.11. Once you have matched an ID or created a new ID for the member of Faculty you

next need to enter their CC Username as an Alternate ID. Click on the *Alternate Identification* tab (Figure 7, Box 1).

The screenshot shows the Oracle Developer Forms Runtime interface for SPAIDEN. The 'Alternate Identification' tab is selected, indicated by callout box 1. The 'Insert Record' icon in the toolbar is highlighted with callout box 2. The 'Name Type' drop-down arrow is highlighted with callout box 3, and the 'Change Type' field is highlighted with callout box 4. The form contains two sets of fields for alternate names or IDs, including Name Type, ID, Last Name, First Name, Middle Name, Change Type, Origin, User, Activity Date, Create User, and Create Date. A note at the bottom states: '*NOTE* Press Duplicate Record to copy information from alternate record or select type of change from available list'. The status bar shows 'Record: 1/1' and navigation icons.

Figure 7

- 1.12. Click the Insert Record Icon (Figure 7, Box 2) then click the *Name Type* drop-down arrow (Figure 7, Box 3) and pick CCID, then click the *Change Type* field (Figure 7, Box 4) and select *ID*.
- 1.13. Enter the CC username into the *ID* field in the form abcd123 e.g. uhky779 etc
- 1.14. Click *Save*.

2. MAKING A 'PERSON' INTO 'STAFF'

2.1. Go to **SIAINST** (Figure 8).

The screenshot shows the Oracle Developer Forms Runtime web application. The browser title is "Oracle Developer Forms Runtime - Web: Open > SIAINST". The page title is "Faculty/Advisor Information SIAINST 8.0 (GARFIELD)". The form contains the following fields and controls:

- ID: 100690603 (dropdown), Name: Jordan, Hal (text), Term: 201011 (dropdown)
- Faculty Member Base Details section:
 - From Term: 201011 (text), Maintenance button (highlighted with callout 1), To Term: 999999 (text)
 - Status: AC (dropdown, highlighted with callout 2) Active (text)
 - Faculty indicator: Faculty (checkbox, highlighted with callout 3)
 - Advisor indicator: Advisor (checkbox, highlighted with callout 4)
 - Status Date: 02-DEC-2010 (calendar)
 - Appointment Date: (calendar)
 - Category: (dropdown)
 - Staff Type: (dropdown)
 - Workload Rule: (dropdown)

At the bottom, there is a footer: "Faculty Data From Term; press DUPLICATE RECORD to copy the data." and "Record: 1/1 | ... | <<08C>".

Figure 8

- 2.2. Enter the person's ID and current Term in the *Key Block* and *Block down*.
- 2.3. If the *From Term* field is not equal to the current Term click the *Maintenance* button to enable changes to be made (Figure 8, Box 1).
- 2.4. Set the *Status* Field (Figure 8, Box 2) to AC – Active.
- 2.5. Tick the *Faculty* Indicator (Figure 8, Box 3).
- 2.6. If the member of Faculty will be a Personal Advisor, PhD Supervisor, etc tick the *Advisor* Indicator (Figure 8, Box 4).
- 2.7. *Block Down* to display the *Faculty Contract, College and Department* Block. Click in the first of the *College* fields (Figure 9, Box 1) and enter the relevant College Code that the member of staff belongs to. Alternatively, click the drop-down arrow to display the pick list.

Note:

- You can enter more than one department per member of staff should you need to. To do this click in the next empty row and complete as 2.7.

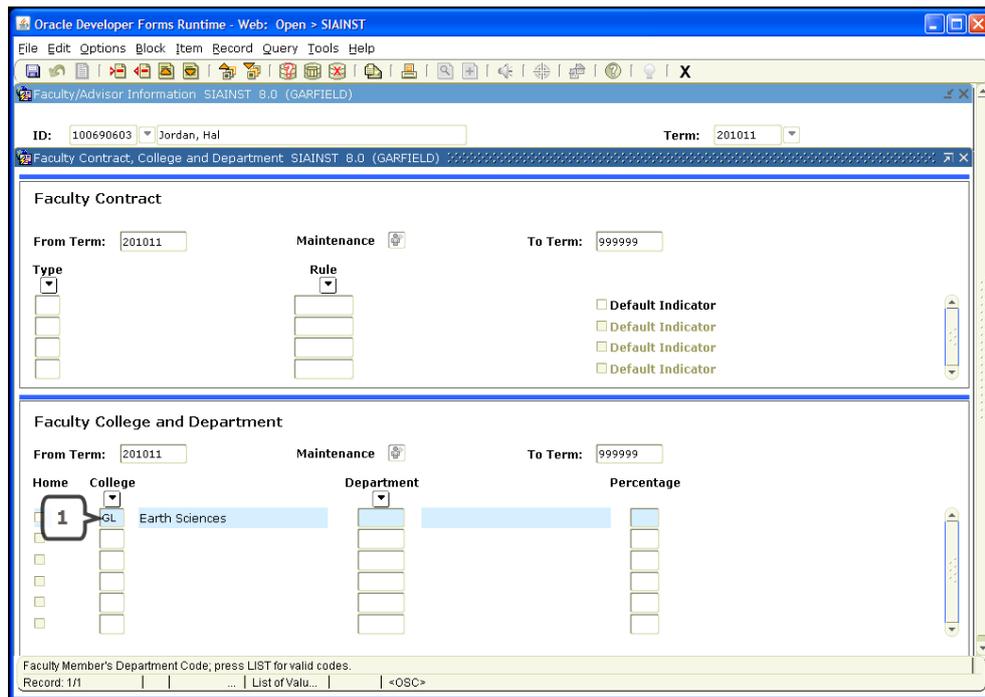


Figure 9

2.8. *Block Down* to display the *Faculty Attributes* Block (Figure 10).

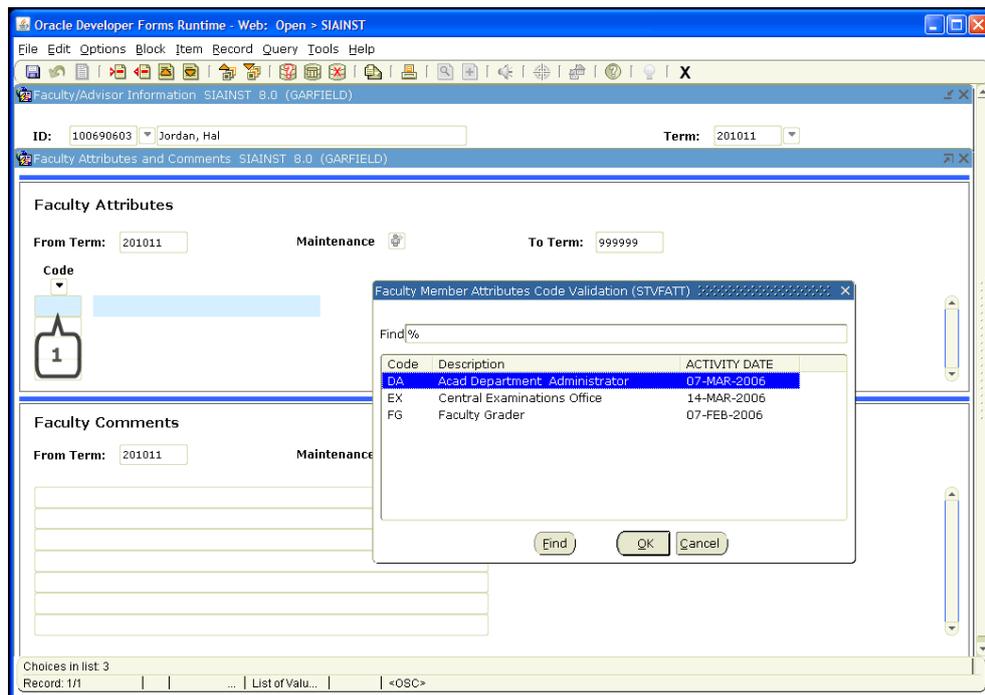


Figure 10

2.9. Double-click in the first field of the *Code* Column (Figure 10, Box 1) to display the *Faculty Attributes* Pick List.

2.10. This is where you choose what access to marking the staff member will have.

- If you do not wish the staff member to have any grading ability, do not select any options on this block and click *Cancel*.

- If the member of Faculty is going to be responsible for entering marks across the entire department, double-click on the *DA – Departmental Administrator* option.
- If you wish to assign the member of Faculty the ability to enter marks for individual courses (e.g. a member of academic staff) double click the *FG – Faculty Grader* option.

Important: If the Departmental Administrator Attribute is set against a faculty record, that person will be automatically assigned to every Section within their department – enabling them to enter marks for all courses.

2.11. Click *Save*.

3. ASSIGNING FACULTY TO SECTIONS.

You can assign Faculty members to any course section in Banner. This will enable them (with the correct attributes on **SIAINST**) to enter marks for that course in Gradebook. It is therefore possible to determine who has the ability to enter marks for each course.

3.1. Go to **SSASECT**; enter the Term and the CRN of the section you wish to assign the member of Faculty to.

3.2. *Block Down* three times to go to the *Instructor* Block (Figure 11).

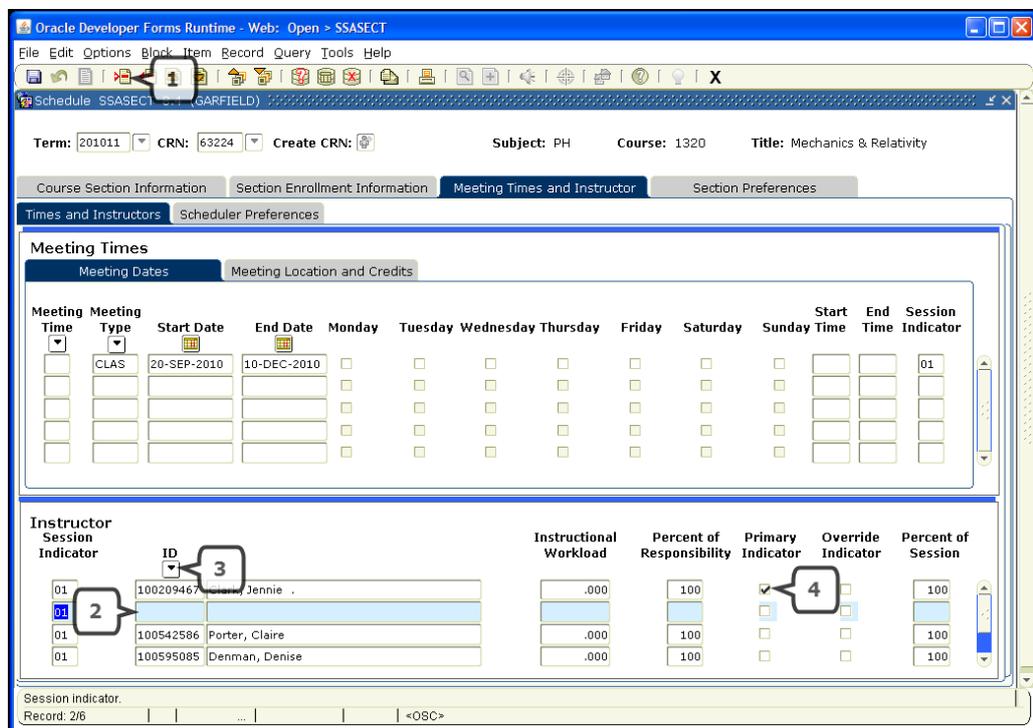


Figure 11

3.3. Click *Insert Record* (Figure 11, Box 1) and enter the ID of the member of Faculty you would like to assign into the *ID* field (Figure 11, Box 2) or click on the drop

down arrow to start a search (Figure 11, Box 3)

- 3.4. It is possible to enter multiple 'Instructors.' One (and only one) Instructor must have the Primary Indicator box checked (Figure 11, Box 4). By default, this will tend to be the administrator with overall responsibility for mark entry.
- 3.5. *Save* any changes.