



## **Using Self-Service Release of Banner Hold**

### **Georgia Enhanced Banner Student and Financial Aid Systems User Documentation**

Version 8.13

Information Technology Services

May 2012

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## Using Self-Service Release of Banner Hold

### Introduction to Self-Service Release of Banner Hold enhancement

#### Purpose

University System of Georgia institutions requested a Georgia modification to create a self-service release of Banner hold. This functionality is available as an enhancement to the baseline Faculty and Advisor Self-Service web product. Removal of Banner hold will be limited to Banner users marked as faculty and/or advisors (ex: Faculty web role) on the Faculty/Advisors Information form (SIAINST).

The *Self-Service Release of Banner Hold* webpage is similar to the baseline *View Hold* webpage (bwlkgstu.P\_ViewHold), but will contain an additional column entitled 'Release Hold'. This column contains a checkbox for faculty and/or advisors to mark a hold code for release via the webpage.

The *Release Hold via Self Service Rules* form (ZOAREHD) allows institution to select hold code(s) from the *Hold Information* form (STVHLDD) that will be released via self service. This form contains a column entitled 'Code' for hold codes and a 'Web Release' column.

#### Target Audience

This user documentation is for the faculty and administrative staff that are responsible for releasing and maintaining student hold code(s). This enhancement can be utilized at any time during the term.

#### Purpose and Scope of Document

This document explains how to use the *Self-Service Release of Banner Hold* enhancement.

This chapter includes the following topics:

- Update the Release Hold via Self-Service Rules form (ZOAREHD)
- Administering Web Tailor
- Changing Student's Hold Code Status as a Faculty Role using the 'All Search' search option
- Changing Student's Hold Code Status as a Advisor Role using the 'All Search' search option
- Changing Student's Hold Code Status as a Advisor Role using the 'One Student' search option
- Changing Student's Hold Code Status who has a checkmark in the 'Release Indicator' option on the Hold Information form (SOAHOLD)

## Graphics

Graphic cues used in this document assist with labeling of steps and items that are particularly important.



Steps for recovery or support.



For additional information, see references.



Exercise caution.



Warning: an error here is critical.

## References



For information about the baseline product, see *Using SCT Banner User Manual for Accounts Receivable, Financial Aid, and Student*.

## Support



For additional ITS resources and support, contact the ITS HELPDESK:

Web [http://www.usg.edu/customer\\_services](http://www.usg.edu/customer_services)  
(self-service ticket submission)

E-mail [helpdesk@usg.edu](mailto:helpdesk@usg.edu)

For urgent or production down situations, call the ITS HELPDESK:

Local 706-583-2001

Toll free within Georgia 1-888-875-3697

## Self-Service Release of Banner Hold Flow

**Description** This enhancement updates student Banner holds in self-service for Faculty and Advisors. The Release Hold via Self-Service Rules Form (ZOAREHD) allows institutions to select hold code(s) for update via the Self-Service Release of Banner Hold webpage. The hold code is validated against the Hold Information Form (STVHLDD).

The enhancement will also display a warning message to self-service users who do not have advisees assigned to them asking the user to release Banner holds.

### Overview of Self-Service Release of Banner Hold

Complete the following steps to implement and execute the Self-Service Release of Banner Hold enhancement in Faculty and Advisor Self-Service.

<b>I. Update the Release Hold via Self-Service Rules Form (ZOAREHD)</b>	
1. Build student hold type code	ZOAREHD
↓	
<b>II. Administering Web Tailor</b>	
1. Log into the secure area of Banner Self Service as a Web Tailor Administrator	
2. Select New Web Tailor Administration	
3. Select procedures to modify	
4. Select associated roles to modify	
5. Exit Web Tailor Administration Menu	
↓	
<b>III. Changing Student's Hold Code Status as a Faculty Role using the 'All Search' search option</b>	
1. Log in to Banner Self-Service as a Faculty member	
2. Select View/Release Hold	
3. Select the term code from the Select Term drop down menu	
4. Select 'All Students' from the Search Selection drop down menu	
5. Select 'Faculty Role' from the Select Role drop down menu	
6. Select CRN from the Select a CRN drop down menu	
7. Place checkmark next to student hold type to be released	
8. Verify student ID and hold type to be released	
9. Successful change notice will be placed on top of the View/Release Holds webpage	
10. Verify student hold type has been updated in Banner	
11. Exit Faculty and Advisor Self-Service	





<b>IV. Changing Student's Hold Code Status as a Advisor Role using the 'All Search' search option</b>
1. Log in to Banner Self-Service as a Faculty member
2. Select View/Release Hold
3. Select the term code from the Select Term drop down menu
4. Select 'All Students' from the Search Selection drop down menu
5. Select 'Advisor Role' from the Select Role drop down menu
6. Place checkmark next to student hold type to be released
7. Verify student ID and hold type to be released
8. Successful change notice will be placed on top of the View/Release Holds webpage
9. Verify student hold type has been updated in Banner
10. Exit Faculty and Advisor Self-Service



<b>V. Changing Student's Hold Code Status as a Faculty and/or Advisor Role using the 'One Student' search option</b>
1. Log in to Banner Self-Service as a Faculty and/or Advisor member
2. Select View/Release Hold
3. Select the term code from the Select Term drop down menu
4. Select 'One Student' from the Search Selection drop down menu
5. Enter Student or Advisee ID or use the Student and Advisee Query option
6. Verify student selected from the Student Verification page
7. Place checkmark next to student hold type to be released
8. Verify student ID and hold type to be released
9. Successful change notice will be placed on top of the View/Release Holds webpage
10. Verify student hold type has been updated in Banner
11. Exit Faculty and Advisor Self-Service



<b>VI. Changing Student's Hold Code Status that has a checkmark in the 'Release Indicator' option on the Hold Information form (SOAHOLD)</b>	
1.	Log in to Banner Self-Service as a Faculty member
2.	Select View/Release Hold
3.	Select the term code from the Select Term drop down menu
4.	Select 'All Students' search
5.	Select 'Faculty Role' from the Select Role drop down menu
6.	Select CRN from the Select a CRN drop down menu
7.	Release Hold checkbox is grayed out
8.	Exit Faculty and Advisor Self-Service



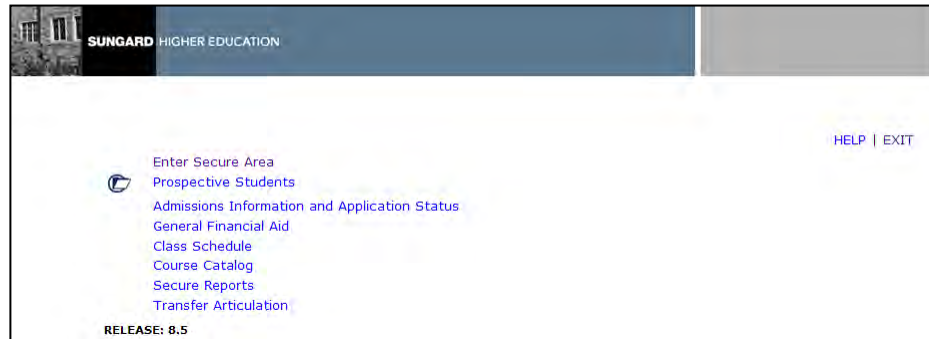
## II. Administering Web Tailor

### Overview

The Self-Service Release of Banner Hold webpage is similar to the baseline *View Hold* webpage (bwlkgstu.P\_ViewHold), but contains an additional column entitled 'Release Hold' and gives the instructor the option to release holds via the instructor's assigned course or searching and entering a single student ID. This enhancement updates the 'TO DATE' on the Hold Information form (SOAHOLD).

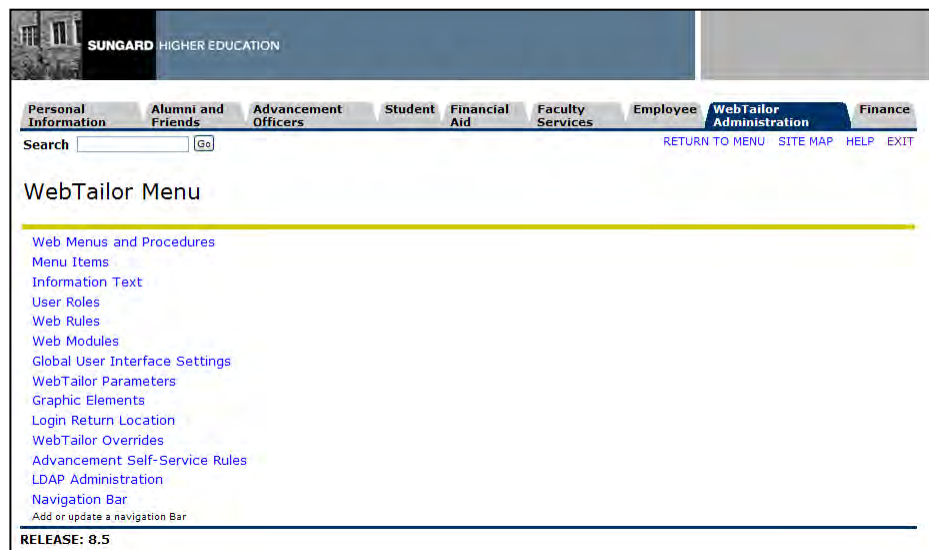
#### 1. Log in to Banner Self-Service as a Web Tailor Administrator

Select **ENTER SECURE AREA** from the Banner Self-Service menu.



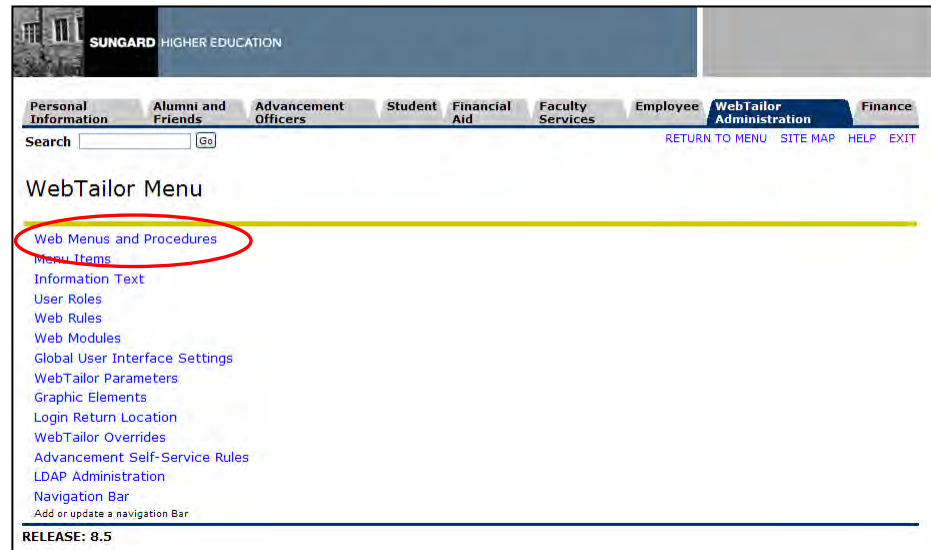
#### 2. Select Web Tailor Administration

Select **WEBTAILOR ADMINISTRATION** from the Banner Self-Service menu.



**3. Select procedures to modify**

Select **WEB MENUS AND PROCEDURES** from the Banner Self-Service menu.



The following procedures are part of the Self-Service Release of Banner Hold enhancement:

**Web package: zwlkrehd.P\_ViewHolds**

**Web package: zwlkrehd.P\_FacAdvrSel**

**Web package: zwlkrehd.P\_FacAdvrStore**

**Web package: zwlkrehd.P\_IdAllSel**

**Web package: zwlkrehd.P\_IdAllStore**

**Web package: zwlkrehd.P\_SaveChanges**

**Web package: zwlkrehd.P\_VerifyChanges**

**4. Modify Associated Roles**

Modify the Associated Roles for each of the procedures listed in Step 3.

ITS recommends that all Web users are given access to these procedures.

Click the **SUBMIT CHANGES** button to save the changes. A message should appear in the **CUSTOMIZE A WEB MENU OR PROCEDURE** window indicating changes have been successfully saved.

The screenshot displays the 'Associated Roles' configuration interface. At the top, the title 'Associated Roles' is circled in red. Below it, a section titled 'Local Role' contains a list of roles with checkboxes. The roles listed are: All Web Users (checked), Alumni, Employee, Executive, Faculty (checked), Faculty Feedback Administrator, Financial Aid Snapshot Admin, Financial Aid Staff, Financial Aid user, Proxy Access, Proxy Access (Support Enabled), Proxy Global Access, Proxy Management, Student, Web Tailor Administrator (checked), Web Tailor PROXYACCESS (GORRSQL Override), Web Tailor PROXYMGMT (GORRSQL Override), and Web for Executives Administrator. At the bottom of the list, there are four buttons: 'Customize Menu Items', 'Customize Information Text', 'Submit Changes' (circled in red), and 'Reset All Fields'. Below these buttons is a 'Delete Local Web Menu or Procedure' button. A link 'Select another Web Menu or Procedure to customize' is located below the buttons. At the bottom left, the text 'RELEASE: 8.5' is visible. A mouse cursor is positioned near the bottom right of the form area.

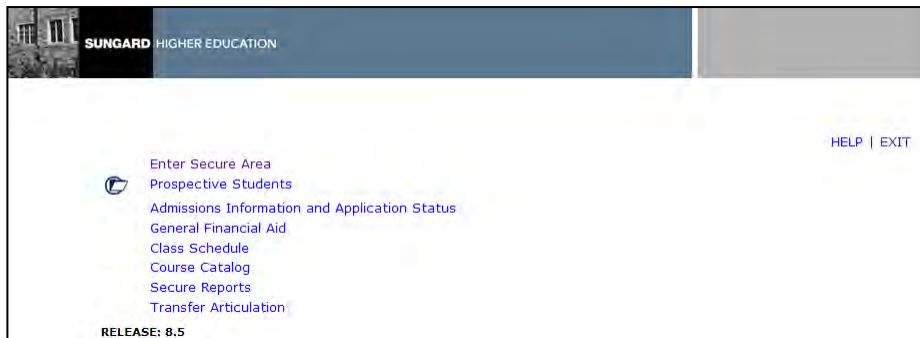
**5. Exit Web Tailor Administration Menu**

Exit the **WEBTAILOR ADMINISTRATION MENU** to return to the **MAIN MENU**.

### III. Changing Student's Hold Code Status as a Faculty Role using the 'All Search' search option

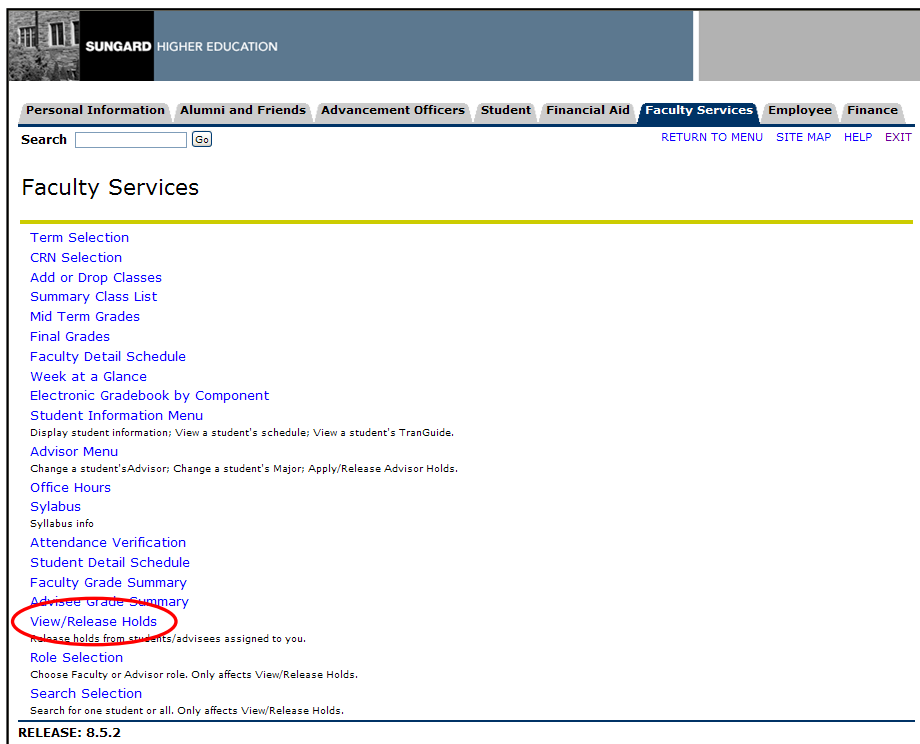
**1. Log in to Banner Self-Service as a Faculty member**

Select **ENTER SECURE AREA** as a Faculty member from the Banner Self-Service menu.



**2. Select View/Release Hold**

Select **VIEW/RELEASE HOLD** on the Faculty Services menu from the Banner Self-Service.



**3. Select the term code from the Select Term drop down menu**

Select the term code from the Select Term drop down menu.

SUNGARD HIGHER EDUCATION

Personal Information Alumni and Friends Advancement Officers Student Financial Aid **Faculty Services** Employee Finance

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Select Term 001102063 Richard Jensen  
Jun 22, 2012 03:17pm

Select a Term:  Aug 15, 2011 - Dec 15, 2011

RELEASE: 8.4

**4. Select 'All Students' from the Search Selection drop down menu**

Select 'All Students' from the Search Selection drop down menu.

SUNGARD HIGHER EDUCATION

Personal Information Alumni and Friends Advancement Officers Student Financial Aid **Faculty Services** Employee Finance

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Search Selection 001102063 Richard Jensen  
Jun 22, 2012 03:21pm

Select Search Option:

RELEASE: 8.13

**5. Select 'Faculty Role' from the Select Role drop down menu**

Select 'Faculty Role' from the Select Role drop down menu.

SUNGARD HIGHER EDUCATION

Personal Information Alumni and Friends Advancement Officers Student Financial Aid **Faculty Services** Employee Finance

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Select Role 001102063 Richard Jensen  
Jun 22, 2012 03:21pm

Select a Role:

RELEASE: 8.13



**6. Select CRN from the Select a CRN drop down menu**

Select CRN from the Select a CRN drop down menu.

The screenshot shows the SUNGARD Higher Education web application. The user is logged in as 001102063 Richard Jensen, Fall 2011, with a session time of Jun 22, 2012 03:22pm. The navigation menu includes Personal Information, Alumni and Friends, Advancement Officers, Student, Financial Aid, Faculty Services (selected), Employee, and Finance. A search bar is present with a 'Go' button. The main content area is titled 'Select a CRN' and features a dropdown menu with the selected option 'ARTS 1105 03: Understanding Visual Culture, 80004 (1)'. A 'Submit' button is located below the dropdown. At the bottom, there is a link to '[ Enter CRN Directly ]' and a release version indicator 'RELEASE: 8.3'.

**7. Place checkmark next to student hold type to be released**

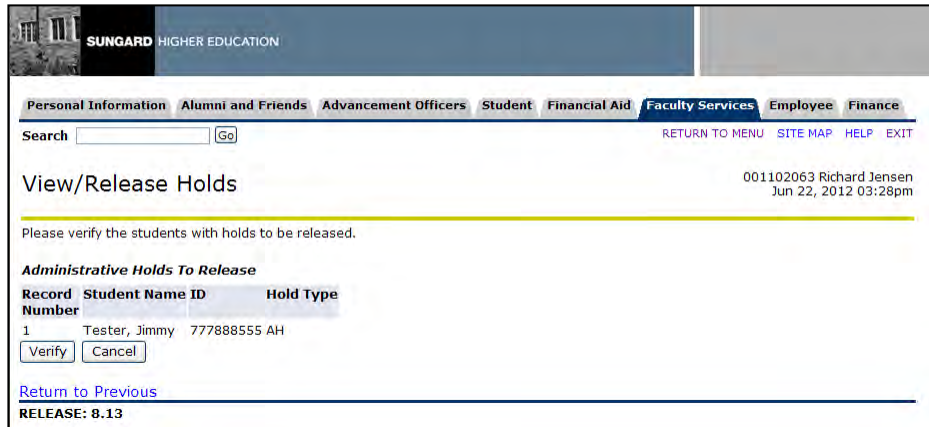
Place checkmark next to student hold type to be released. Click the Save Changes button.

The screenshot shows the 'View/Release Holds' page in the SUNGARD Higher Education web application. The user is logged in as 001102063 Richard Jensen, Jun 22, 2012 03:26pm. The navigation menu is the same as in the previous screenshot. The main content area is titled 'View/Release Holds' and includes a search bar and a 'Go' button. Below the title, there is a note: 'Select the holds to release by clicking the checkbox and press submit changes.' The section is titled 'Administrative Holds for Fall 2011' with a CRN of 80004. A table lists the holds with columns for Record Number, Release Hold, Student Name, ID, Hold Type, From Date, To Date, Amount, Reason, Originator, and Processes Affected. The second record, for Jimmy Tester (ID 777888555), has a checkmark in the 'Release Hold' column. A 'Save Changes' button is located below the table. A link to 'Return to Previous' is also present. At the bottom, there is a release version indicator 'RELEASE: 8.13'.

Record Number	Release Hold	Student Name	ID	Hold Type	From Date	To Date	Amount	Reason	Originator	Processes Affected
1	<input type="checkbox"/>	Bishop, Jacqueline	001148662	Academic Dept Hold	Jun 22, 2012	Dec 31, 2099				Registration
2	<input checked="" type="checkbox"/>	Tester, Jimmy	777888555	Advisor Hold	Jun 22, 2012	Dec 31, 2099				Registration Transcripts Graduation Grades Accounts Receivable Enrollment Verification Application Evaluation

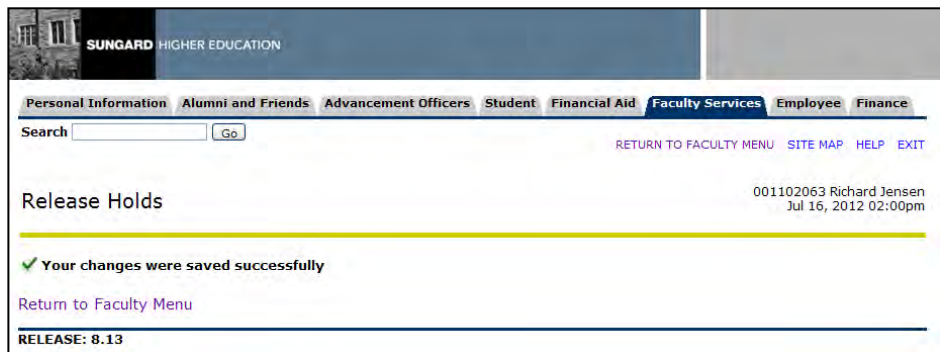
**8. Verify student ID and hold type to be released**

Verify student ID and hold type to be released.



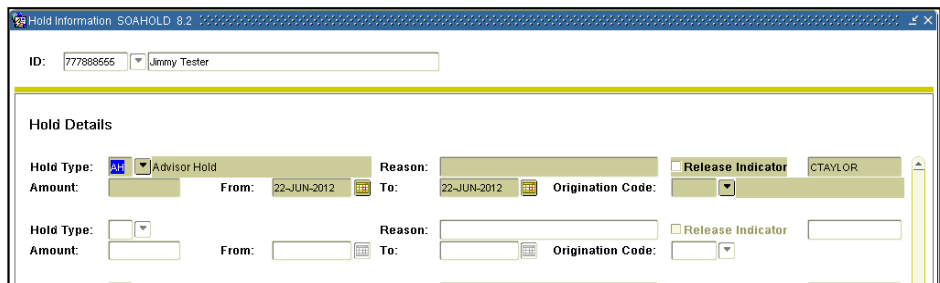
**9. Successful change notice will be placed on top of the View/Release Holds webpage**

A successful change notice will be placed on top of the View/Release Holds webpage.



**10. Verify student hold type has been updated in Banner**

Verify student hold type has been updated in Banner.



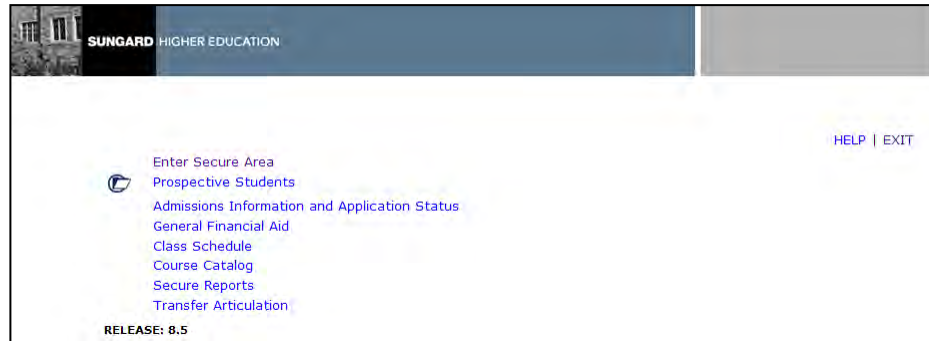
**11. Exit Faculty and Advisor Self-Service**

Exit Faculty and Advisor Self-Service.

## IV. Changing Student's Hold Code Status as a Advisor Role using the 'All Search' search option

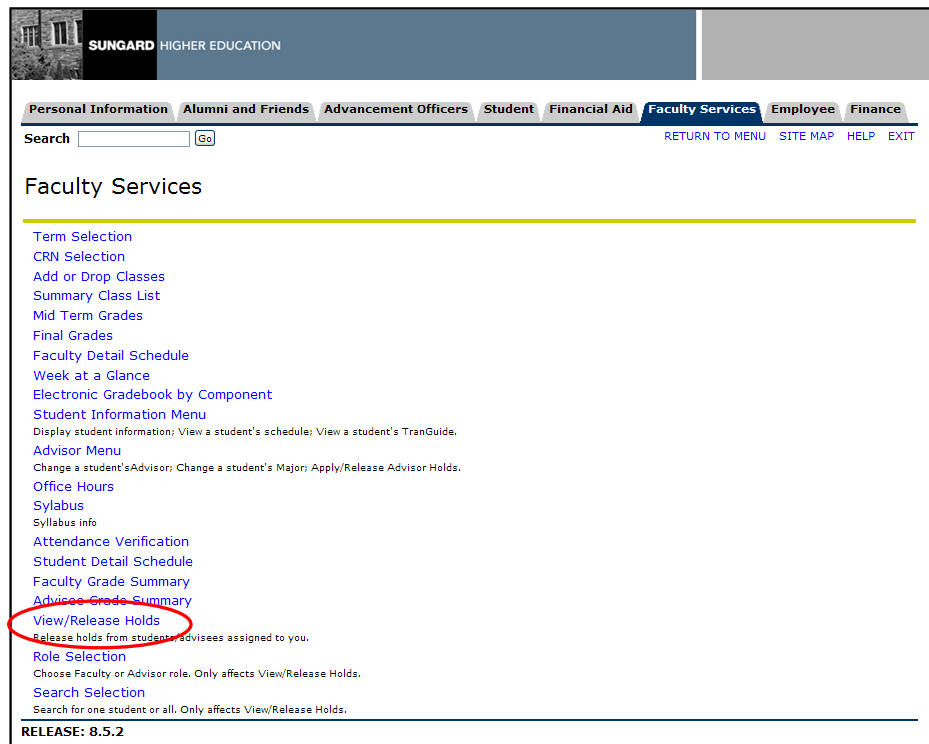
### 1. Log in to Banner Self-Service as a Advisor member

Select **ENTER SECURE AREA** as a Advisor member from the Banner Self-Service menu



### 2. Select View/Release Hold

Select **VIEW/RELEASE HOLD** on the Faculty Services menu from the Banner Self-Service



**3. Select the term code from the Select Term drop down menu**

Select the term code from the Select Term drop down menu

The screenshot shows the 'Select Term' page. At the top, there is a navigation bar with 'SUNGARD HIGHER EDUCATION' and several menu items: 'Personal Information', 'Alumni and Friends', 'Advancement Officers', 'Student', 'Financial Aid', 'Faculty Services', 'Employee', and 'Finance'. Below the navigation bar is a search field with a 'Go' button and links for 'RETURN TO MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main heading is 'Select Term' with a user ID '001102063 Richard Jensen' and a timestamp 'Jun 22, 2012 03:17pm'. A dropdown menu labeled 'Select a Term:' is set to 'Fall 2011 ..... Aug 15, 2011 - Dec 15, 2011'. A 'Submit' button is at the bottom. The footer indicates 'RELEASE: 8.4'.

**4. Select 'All Students' from the Search Selection drop down menu**

Select 'All Students' from the Search Selection drop down menu

The screenshot shows the 'Search Selection' page. It has the same navigation bar as the previous page. The main heading is 'Search Selection' with a user ID '001102063 Richard Jensen' and a timestamp 'Jun 22, 2012 03:21pm'. A dropdown menu labeled 'Select Search Option:' is set to 'All Students'. A 'Submit' button is at the bottom. The footer indicates 'RELEASE: 8.13'.

**5. Select 'Advisor Role' from the Select Role drop down menu**

Select 'Advisor Role' from the Select Role drop down menu

The screenshot shows the 'Select Role' page. It has the same navigation bar as the previous pages. The main heading is 'Select Role' with a user ID '001102063 Richard Jensen' and a timestamp 'Jul 16, 2012 02:04pm'. A dropdown menu labeled 'Select a Role:' is set to 'Advisor Role'. A 'Submit' button is at the bottom. The footer indicates 'RELEASE: 8.13'.

**6. Place checkmark next to student hold type to be released**

Place checkmark next to student hold type to be released

Personal Information Alumni and Friends Advancement Officers Student Financial Aid Faculty Services Employee Finance

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

View/Release Holds 001102063 Richard Jensen  
Jul 16, 2012 02:08pm

Select the holds to release by clicking the checkbox and press submit changes.

**Administrative Holds for Fall 2011**

Record Number	Release Hold	Student Name	ID	Hold Type	From Date	To Date	Amount	Reason	Originator	Processes Affected
1	<input type="checkbox"/>	Jensen, Carol	000028965	Leg.-Constitution-US-6288	Apr 04, 1997	Apr 01, 3000	\$0.00			Graduation
2	<input checked="" type="checkbox"/>	Jensen, Jennifer	001104793	Advisor Hold	Jul 16, 2012	Dec 31, 2099				Registration Transcripts Graduation Grades Accounts Receivable Enrollment Verification Application Evaluation
3	<input type="checkbox"/>	Jensen, Jessica	001062031	Regents Test Warning Only-5016	Jun 07, 2005	Dec 31, 3000		Regents Exam Required		
4	<input type="checkbox"/>	Jensen, Rosalie	001084386	Regents Test Warning Only-5016	Jun 07, 2005	Dec 31, 3000		Regents Exam Required		

[Return to Previous](#)

RELEASE: 8.13

**7. Verify student ID and hold type to be released**

Verify student ID and hold type to be released

Personal Information Alumni and Friends Advancement Officers Student Financial Aid Faculty Services Employee Finance

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

View/Release Holds 001102063 Richard Jensen  
Jul 16, 2012 02:09pm

Please verify the students with holds to be released.

**Administrative Holds To Release**

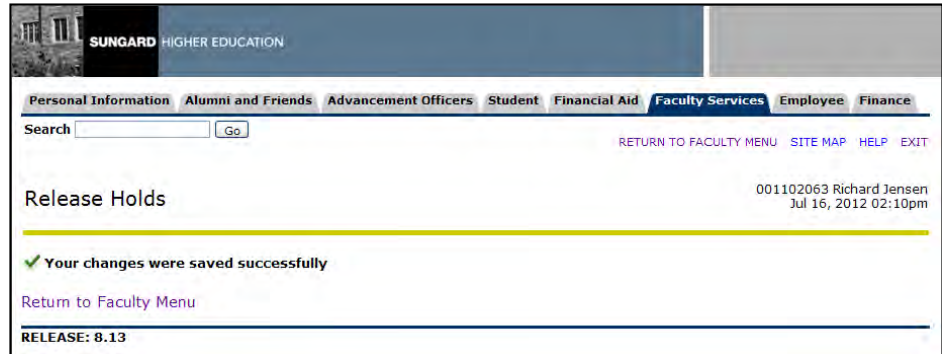
Record Number	Student Name	ID	Hold Type
1	Jensen, Jennifer	001104793	AH

[Return to Previous](#)

RELEASE: 8.13

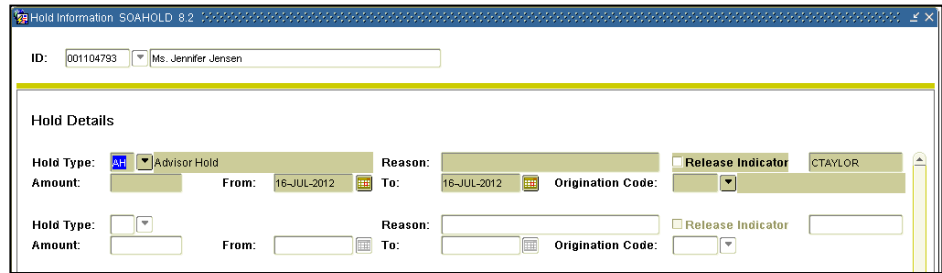
**8. Successful change notice will be placed on top of the View/Release Holds webpage**

Successful change notice will be placed on top of the View/Release Holds webpage



**9. Verify student hold type has been updated in Banner**

Verify student hold type has been updated in Banner



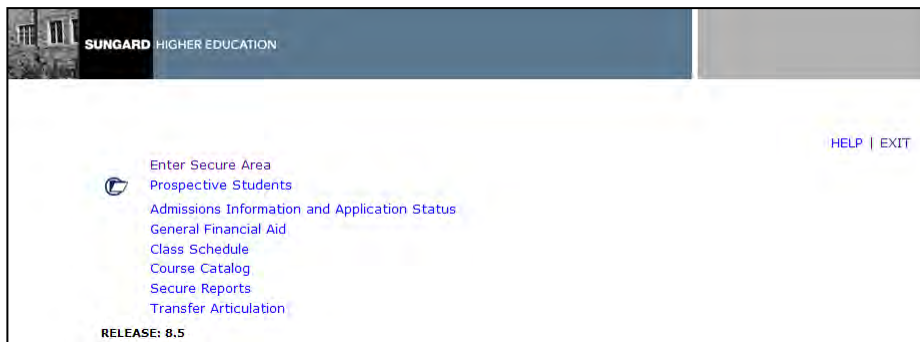
**10. Exit Faculty and Advisor Self-Service**

Exit Faculty and Advisor Self-Service

## V. Changing Student's Hold Code Status as a Faculty and Advisor Role using the 'One Student' search option

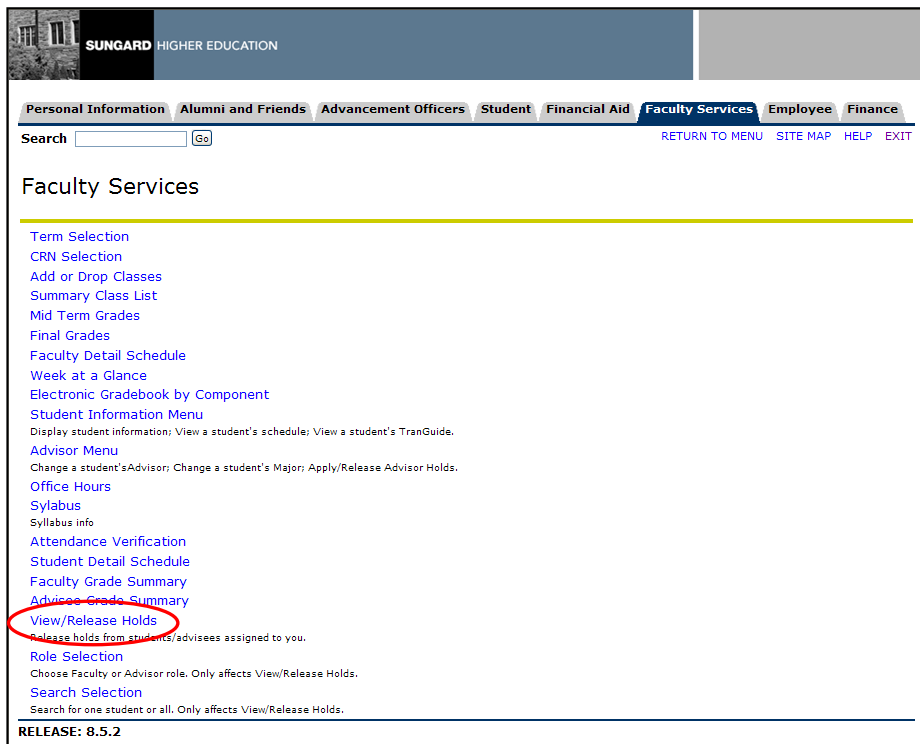
### 1. Log in to Banner Self-Service as a Faculty member

Select **ENTER SECURE AREA** as a Faculty member from the Banner Self-Service menu



### 2. Select View/Release Hold

Select **VIEW/RELEASE HOLD** on the Faculty Services menu from the Banner Self-Service





**3. Select the term code from the Select Term drop down menu**

Select the term code from the Select Term drop down menu

The screenshot shows the 'Select Term' page in the Banner Hold system. The header includes the SUNGARD HIGHER EDUCATION logo and a navigation menu with tabs for Personal Information, Alumni and Friends, Advancement Officers, Student, Financial Aid, Faculty Services, Employee, and Finance. Below the navigation is a search bar with a 'Go' button and links for RETURN TO MENU, SITE MAP, HELP, and EXIT. The main content area is titled 'Select Term' and includes a dropdown menu for 'Select a Term:' with the selected option 'Fall 2011 ..... Aug 15, 2011 - Dec 15, 2011'. A 'Submit' button is located below the dropdown. The page footer indicates 'RELEASE: 8.4'.

**4. Select 'One Student' from the Search Selection drop down menu**

Select 'One Student' from the Search Selection drop down menu

The screenshot shows the 'Search Selection' page in the Banner Hold system. The header includes the SUNGARD HIGHER EDUCATION logo and a navigation menu with tabs for Personal Information, Alumni and Friends, Advancement Officers, Student, Financial Aid, Faculty Services, Employee, and Finance. Below the navigation is a search bar with a 'Go' button and links for RETURN TO MENU, SITE MAP, HELP, and EXIT. The main content area is titled 'Search Selection' and includes a dropdown menu for 'Select Search Option:' with the selected option 'One Student'. A 'Submit' button is located below the dropdown. The page footer indicates 'RELEASE: 8.13'.



**5. Enter Student or Advisee ID or use the Student and Advisee Query option**

Enter Student or Advisee ID or use the Student and Advisee Query option

SUNGARD HIGHER EDUCATION

Personal Information Alumni and Friends Advancement Officers Student Financial Aid Faculty Services Employee Finance

Search  Go

RETURN TO MENU SITE MAP HELP EXIT

Student and Advisee ID Selection 001102063 Richard Jensen  
Fall 2011  
Jul 16, 2012 02:21pm

You may enter:

1. The ID of the Student or Advisee you want to process, or
2. Partial names, a student search type, or a combination of both. Then select Submit.

Student or Advisee ID:

OR

**Student and Advisee Query**

Last Name:

First Name:

Search Type:  Students  
 Advisees  
 Both  
 All

RELEASE: 8.4

**6. Verify student selected from the Student Verification page**

Verify student selected from the Student Verification page

SUNGARD HIGHER EDUCATION

Personal Information Alumni and Friends Advancement Officers Student Financial Aid Faculty Services Employee Finance

Search  Go

RETURN TO MENU SITE MAP HELP EXIT

Student Verification 001102063 Richard Jensen  
Jul 16, 2012 02:23pm

Please select Submit if the person you chose is correct. If this is incorrect, choose the ID Selection link to try again.

Jessica Jensen is the name of the student or advisee that you selected.

[ ID Selection ]

RELEASE: 8.4

**7. Place checkmark next to student hold type to be released**

Place checkmark next to student hold type to be released

Personal Information Alumni and Friends Advancement Officers Student Financial Aid **Faculty Services** Employee Finance

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

View/Release Holds 001102063 Richard Jensen  
Jul 16, 2012 02:24pm

Select the holds to release by clicking the checkbox and press submit changes.

**Administrative Holds for Fall 2011**

Record Number	Release	Student Name	ID	Hold Type	From Date	To Date	Amount	Reason	Originator	Processes Affected
1	<input checked="" type="checkbox"/>	Jensen, Jessica	001062031	Regents Test Warning Only-5016	Jun 07, 2005	Dec 31, 3000		Regents Exam Required		

[Return to Previous](#)

RELEASE: 8.13

**8. Verify student ID and hold type to be released**

Verify student ID and hold type to be released

Personal Information Alumni and Friends Advancement Officers Student Financial Aid **Faculty Services** Employee Finance

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

View/Release Holds 001102063 Richard Jensen  
Jul 16, 2012 02:25pm

Please verify the students with holds to be released.

**Administrative Holds To Release**

Record Number	Student Name	ID	Hold Type
1	Jensen, Jessica	001062031	RE

[Return to Previous](#)

RELEASE: 8.13

**9. Successful change notice will be placed on top of the View/Release Hold webpage**

Successful change notice will be placed on top of the View/Release Holds webpage

Personal Information Alumni and Friends Advancement Officers Student Financial Aid **Faculty Services** Employee Finance

Search   [RETURN TO FACULTY MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Release Holds 001102063 Richard Jensen  
Jul 16, 2012 02:25pm

**✓ Your changes were saved successfully**

[Return to Faculty Menu](#)

RELEASE: 8.13

**10. Verify student hold type has been updated in Banner**

Verify student hold type has been updated in Banner

The screenshot shows a web browser window titled "Hold Information SOAHOLD 8.2". At the top, there is a search bar with "ID: 001062031" and a name field containing "Ms. Jessica Jensen". Below this is a section titled "Hold Details". The first row of details shows: "Hold Type: 26 Regents Test Warning Only-5016", "Reason: Regents Exam Required", and "Release Indicator: SJONES". The second row shows: "Amount: [redacted]", "From: 07-JUN-2005", "To: 16-JUL-2012", and "Origination Code: [redacted]". Below these are empty input fields for "Hold Type", "Amount", "From", "To", "Reason", and "Origination Code", along with a "Release Indicator" checkbox and field.

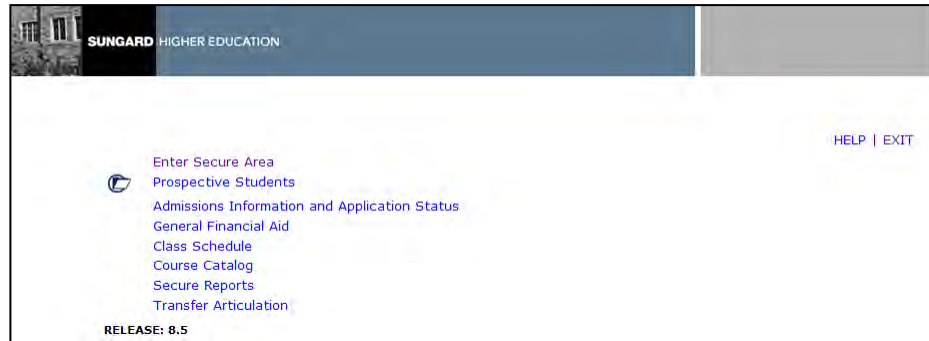
**11. Exit Faculty and Advisor Self-Service**

Exit Faculty and Advisor Self-Service

## VI. Changing Student's Hold Code Status that has a checkmark in the 'Release Indicator' option on the Hold Information form (SOAHOLD)

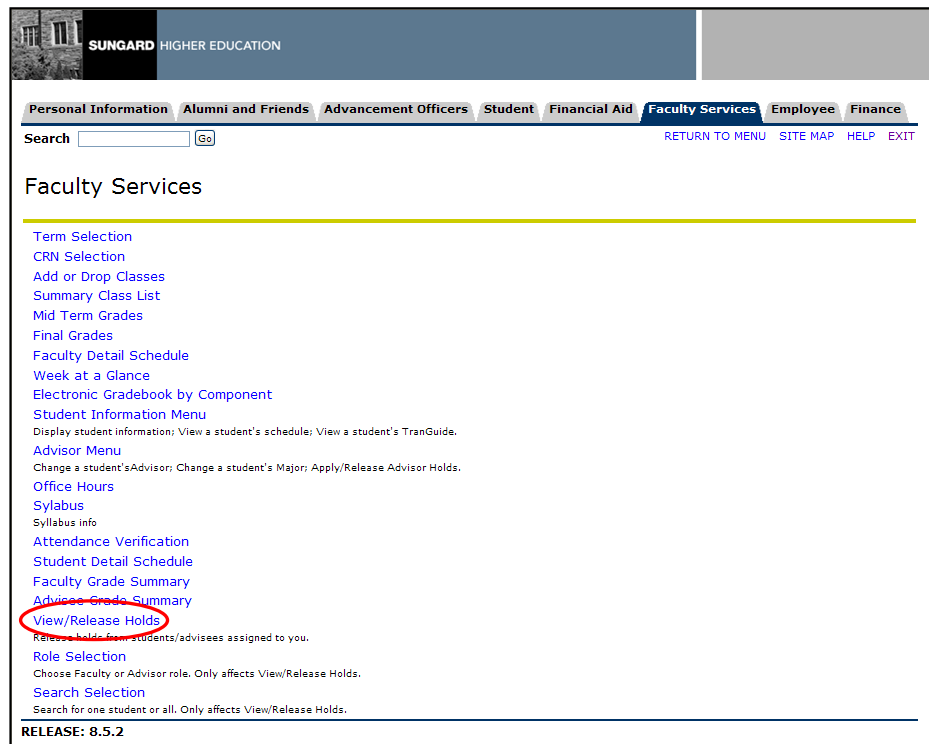
### 1. Log in to Banner Self-Service as a Faculty member

Select **ENTER SECURE AREA** as a Faculty member from the Banner Self-Service menu



### 2. Select View/Release Hold

Select **VIEW/RELEASE HOLD** on the Faculty Services menu from the Banner Self-Service



**3. Select the term code from the Select Term drop down menu**

Select the term code from the Select Term drop down menu

SUNGARD HIGHER EDUCATION

Personal Information Alumni and Friends Advancement Officers Student Financial Aid Faculty Services Employee Finance

Search  Go RETURN TO MENU SITE MAP HELP EXIT

Select Term 001102063 Richard Jensen Jun 22, 2012 03:17pm

Select a Term: Fall 2011 ..... Aug 15, 2011 - Dec 15, 2011

Submit

RELEASE: 8.4

**4. Select 'All Students' from the Search Selection drop down menu**

Select 'All Students' from the Search Selection drop down menu

SUNGARD HIGHER EDUCATION

Personal Information Alumni and Friends Advancement Officers Student Financial Aid Faculty Services Employee Finance

Search  Go RETURN TO MENU SITE MAP HELP EXIT

Search Selection 001102063 Richard Jensen Jun 22, 2012 03:21pm

Select Search Option: All Students

Submit

RELEASE: 8.13

**NOTE: Enhancement will work the same using the 'One Student' search option.**

**5. Select 'Faculty Role' from the Select Role drop down menu**

Select 'Faculty Role' from the Select Role drop down menu

SUNGARD HIGHER EDUCATION

Personal Information Alumni and Friends Advancement Officers Student Financial Aid Faculty Services Employee Finance

Search  Go RETURN TO MENU SITE MAP HELP EXIT

Select Role 001102063 Richard Jensen Jun 22, 2012 03:21pm

Select a Role: Faculty Role

Submit

RELEASE: 8.13

**6. Select CRN from the Select a CRN drop down menu**

Select CRN from the Select a CRN drop down menu

**7. Release Hold checkbox is grayed out**

Release Hold checkbox is grayed out. This means that either the Release Indicator is checked on SOAHOLD for this record or the hold type is not entered on ZOAREHD with the Web Release indicator checked. You do not have the ability to release this hold.

Record Number	Release Hold	Student Name	ID	Hold Type	From Date	To Date	Amount	Reason	Originator	Processes Affected
1	<input type="checkbox"/>	Bishop, Jacqueline	001148662	Academic Dept Hold	Jun 22, 2012	Dec 31, 2099				Registration

**8. Exit Faculty and Advisor Self-Service**

Exit Faculty and Advisor Self-Service

## Appendix A: Document History

This section details the history of the document and updates made for each modification.

Release and Date	Form/Process	Page	Update Description
Georgia Enhancements 7.13.1, June 30, 2006	NA	NA	Original
Georgia Enhancements 7.17, December 19, 2008	N/A	Multiple	Updated description of enhancement to include new warning message. Also, updated version number for packages to reflect new release number.
Georgia Enhancements 7.20, June 30, 2009	N/A	Multiple	Updated the following: - When the 'Release Hold' checkbox is grayed out, the 'SAVE CHANGES' button should not be active or available for the user to select in the zwlkrehd.P_ViewHolds package. - When a self-service user saves a released hold, the 'SAVE CHANGES' button should not be active or available for the user to select in the zwlkrehd.P_VerifyChanges package. - When the self-service user saves a released hold, the 'Return to Previous' link should be changed to 'Return to Faculty Services menu'. (bmenu.P_FacMainMnu)
Georgia Enhancements 8.0, March 31, 2010	NA	All	Updated screenshots for 8.0. Addition of Process Flow Diagram
Georgia Enhancements 8.4, September 17, 2010		All	Updated screenshots for 8.4
Georgia Enhancements 8.13, May 31, 2012		All	Updated screenshots for 8.13



## Appendix B: Process Flow

# Self-Service Release of Holds

