

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

Person Comment SPACMNT 7.0 (TRNG) 23-MAY-2005 09:01 AM

ID: A00000059 Anniston, Jennifer

Comment Type: 104 Special Needs

Originator: REGS Registration Office

Contact:

Contact Date: 23-MAY-2005

Appointments

From Time:

To Time:

Confidentiality

Add Date: 23-MAY-2005

Activity Date: 23-MAY-2005

Last Updated by: LHOMMEL

Comments:

This is a test with 104-Special Needs, Registration Office as originator and no contact.

Narrative Comments:

More comments here.

Short Comment Text (free form).

Record: 1/3

<OSC>

This guide provides instructions on how to:

- Add a comment to a person's record
- Edit comments
- Find and replace information in the comment text areas
- Search for comments using multiple search criteria
- Associate a comment to a student appointment, for those offices using the **SOAAPPT** form.

Introduction


Once a person is established in Banner, comments can be entered using the **Person Comment** form (SPACMNT). SPACMNT allows users to track and search for comments in a variety of ways:

- by the type of comment,
- by administrative unit,
- by date,
- by the person who last updated the comment
- by using key words within the comment text area itself

SPACMNT allows comments up to 36,000 characters. Comments are not associated with holds. If you need to make a sizable comment about a student's hold, consider adding a comment in **SPACMNT** and referencing the Hold Type and date within the comment text. You can also reference that a comment exists about a hold through in the **Hold** form (**SOAHOLD**). Refer to the **SOAHOLD** quick reference for more information.

SPACMNT Fields and their Purpose

Comment Type:

There are many comment types available. Selection of a comment type is required. To view available comment types, click on the  down arrow (search icon) next to the **Comment Type** field. The naming schema for comment types is based on the administrative unit that uses the comment type the most. Similar to other Banner forms, "S" (Student) is for Records and Registration related comments, "R" for Financial Aid, "T" for Accounts Receivable, and "G" is used for general person comments. In cases where there isn't a Banner naming convention identified other letters are used. For example, any comments beginning with "A" are Undergraduate Admissions related. Comments about student holds are type "ZH".

Originator:

The originator is the administrative unit that the person entering the comment represents. For instance, if Admissions is entering a comment from the Admissions perspective, the originator is ADMS.

Confidentiality Flag

The **Confidentiality** checkbox is used to indicate that the comment is considered confidential.

Add Date:

The **Add Date** field displays the original date when the comment was created. This field is populated automatically and does not change.

Activity Date:

The **Activity Date** field displays the date the comment information was last updated. This date field is populated automatically. Comments with the most recent activity dates are listed first. You cannot query based on activity date.


Last Updated by:

The **Last Updated By** field displays the Banner UserID of the last person to update the **Comment** block. UserID is typically the individual's first initial and last name. Information is automatically populated with the UserID of the person signed into Banner and managing data on the form.

Note: If your department chooses to use a single comment record to store multiple comments of the same comment type, it is recommended that each commenter enter the date and their UserID in front of the information they add.


Comments:

The **Comments** field allows for comments up to 4000 characters in length and has auto-wrap capability. Use this area for entering brief comment text or as an overview of narrative comments.

If you select the **Comments** edit button,  the **Editor** window displays. From here you can update comments, as well as search and replace text within the comment.

Narrative Comments:

The **Narrative Comments** field allows you to enter up to 32,760 characters. The comment text automatically wraps within its window.

If you select the **Narrative Comments** edit button,  the **Editor** window appears. From here you can update comments, as well as search and replace text within the comment.

Special Note:

The fields described in this section are not being used at this time. Since these fields can affect admissions processing, please contact the Undergraduate Admissions office prior to using them.


Contact:

This field is generally used to note Admissions related contact information. This code notes how the student contacted EWU. Contact types trigger Admissions mailings. Do not add contacts until you have approval from the Undergraduate Admissions office.


Contact Date:

For comments that were migrated into Banner, this date reflects the date the comment was added to SISPlus. The **Originator** is CONV for migrated comments.

The Admissions office is not currently using contacts. However, in the future when the **Contact** area is used, the **Contact Date** field will display the date the contact code was added to the comment record.

The date can be selected by clicking on the calendar icon  next to the field. When the **Appointments** area is used, the **Contact Date** is populated with the appointment date.

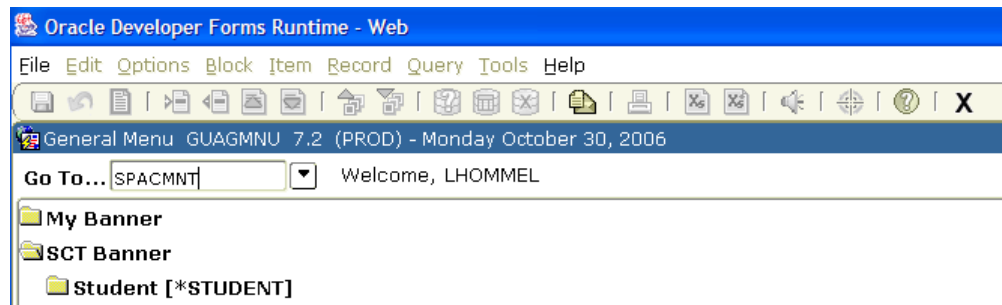
Appointments:

Appointments	
From Time:	<input type="text"/>
To Time:	<input type="text"/>

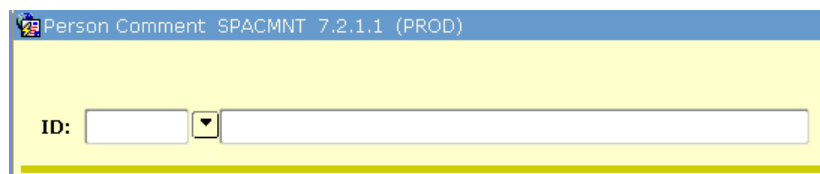
Appointments along with the **From Time** and **To Time**, are currently not being used. These appointment areas are generally used by Admission offices and potentially by Advising offices to track new student appointments and comments associated with these appointments. Check with the Undergraduate Admissions office prior to using.



Adding a comment to a person's record

1. After logging into Banner, type **SPACMNT** in the **Go To** field and press **Enter**.



2. Type the individual's EWUID number into the **ID** field of the key block or search for the person using the search function.



3. Click **Next Block** 
4. The first time a comment is entered for a student, a blank form displays. Once comments are in the system, insert a new record to receive a blank entry. Select the **Insert Record** icon 
5. The **Comment Type** is required. Select the comment type that most closely reflects the type of comment being entered.

Note: If your administrative unit or department needs a specialized comment type, please contact the Records and Registration office to request a new code.

The screenshot shows the top section of the Banner IN3 Person Comment Form. Annotations include:

- A red arrow points to the 'Admin Unit or Dept' dropdown menu with the text 'Admin Unit or Dept'.
- A red circle highlights the 'Appointments' section, which includes 'From Time' and 'To Time' fields. A red arrow points to it with the text 'Useful only to those who use SOAAPPT'.
- A red arrow points to the 'Contact' dropdown menu with the text 'Don't use without permission from Undergraduate Admissions'.
- A red bracket on the right side of the 'Add Date', 'Activity Date', and 'Last Updated by' fields is labeled 'Automatically populate during save.'

- You are strongly encouraged to use the **Originator** field. This assures you and others can easily identify comments made by individuals in your administrative unit or department.

Note: If the administrative unit you represent is not available in the drop down list, contact the Undergraduate Studies office to request an addition.

- The **Activity Date**, **Last Updated Date** and **Last Updated By** fields populate automatically.
- If the comment is considered confidential, check the **Confidentiality** checkbox.

Note: This flag appears to be informational in nature. It may also affect reporting.

- Enter the comment in the **Comments** field. Most comments are entered into this field. The **Narrative Comments** field is only used when comments will be very lengthy or if you or your department determines that multiple comments of the same type and originator should be entered into one comment record (see example below). If you choose to do this, enter new comments on the top. This will make it easier to find the most recent information without scrolling to the bottom. Because the UserID is only listed for the last person who edited a comment (**Last Updated By**), it may also be helpful to put the date and your name at the beginning of each comment segment.


The screenshot shows the 'Comments' field in the Banner IN3 form. It contains a list of comment entries, each starting with a date and name, followed by the comment text:

- 10/30/06 lhommel - Of course, this is all in fun to demonstrate how to add multiple comments to a single comment record. The comments should be the same Comment Type and same Originator (academic unit/department).
- 10/30/06 lhommel - I concur.
- 10/20/06 dfockler - LouAnn deserves a raise.
- 09/28/06 mbaldwin - This is up for debate.
- 09/25/06 lhommel - Great person.


- You can copy and paste information into both the **Comments** and **Narrative Comments** fields.

Click **Save** 

Editing comments in SPACMNT




1. Search for the comment you wish to change and change the information.
2. Click **Save** .

Note: You will be unable to change the **Activity Date** and the **Last Updated By** fields. These fields populate automatically when changes are saved.

You can also edit information within the comment fields by selecting the **Comments** or **Narrative** **Comments** edit icons beside the comment text area you wish to change .

1. Click on the icon for the field you'd like to edit.
2. The **Editor** window displays. Edit content in the **Editor** window.
3. You can also search for strings of text and replace them with something else.
 - Click on the **Search** button.
 - The **Search/Replace** window displays. Move the search window off of the **Editor** window by clicking on the title bar and dragging to another location. This allows you to see the results of your search in the **Editor** window. This is most helpful when text areas are very lengthy.
 - Type your character string into the **Search for:** field and click on the **Search** button. Your string, if it exists, will be highlighted in the SCT Banner **Editor** window. Click the **Search** button again to move to the next instance of the search string.
 - To replace a character string with something else, enter the original string in the **Search for:** field and what you would like changed in the **Replace with:** field. To replace all instances of the original text, click **Replace all**. To replace a selected instance, click **Search** until you find the instance you'd like to replace and then click **Replace**.
 - Select **Cancel** at the bottom of the **Search/Replace** window, once you have completed searching and/or replacing text.
4. Select **OK** on the bottom of the "SCT Banner Editor" window to save your changes to the **SPACMNT** comment area being accessed.
5. Cancel at any time by clicking on the **Cancel** button at the bottom of either window.

Searching for comments in SPACMNT:

1. To evoke a search or query, type the student ID in the Key block
2. Click **Next Block** 
3. In the toolbar, click the **Enter Query** icon .
4. Ways to Search
 - You can search in most of the fields for comments.
 - Use the specific code in **Comment Type**, **Originator** and **Contact Type** fields (when used).
 - Search either of the date fields with a calendar icon for a specific date
 - Search for comments you have updated by searching for your Banner User ID in the **Last Updated By** field.
 - You can also search for strings of characters within the two comment text areas.
 - **Note:** You cannot search the **Activity Date** field.
5. Once you have entered the search criteria, click the **Execute Query** icon . All the comments that meet the criteria will display in the results.

Using Wildcards

You can refine your search by using wild cards. Use the % sign for multiple characters and “_”(underline) for a single character.

Example:

Type **A%** into the **Comment Type** field to see all the undergraduate admission related comments. You could also perform a search by entering **ADMS** into the **Originator** field.

Note: Be careful not to assume you are seeing all comments entered by Undergraduate Admissions staff when using **A%** in the **Comment Type** field. Notice the difference in results when you search **A%** in the **Comment Type** field vs **ADMS** in the **Originator** field.


Example:

You want to find all comments concerning file location: Since multiple areas have file location codes, you can search for them all by entering: **_F%** in the **Comment Type** field. Provided the student has multiple types of comments on his or her record, you could see AF, IF and UF comments.

Keep in mind that the query function is case specific: 's' is not the same as 'S'

Associate a comment to a student appointment (SOAAPPT)

If **SOAAPPT** is being used for Admissions appointments, Admissions office staff can associate a comment with that appointment.

- First, enter an appointment on **SOAAPPT**.
- Return to **SPACMNT**.
- Enter the **Comment Type** and **Originator**.
- Click on the **Appointments** maintenance icon  and select the appointment you'd like to associate your comment to, from the list of appointments for that person. **Contact**, **Contact Date**, **From Time** and **To Times** fields are populated based on information in **SOAAPPT**.
- Enter comment text. Save the comments.