Banner XE – Adding a Section Restriction

1. Access the **Banner XE Student Class Schedule** link under Production Instance Links on the Banner Links website (http://www.lehigh.edu/go/bannerlinks). You will have to authenticate to view the website. Banner XE is not dependent on any particular browser or operating system so use whichever you prefer.
2. Login to **Banner XE Student Class Schedule** with your credentials (the ones you would use to access your computer or Lehigh email). You'll see the new Banner XE interface. If you have not reviewed the Banner XE Navigation Overview document, you are encouraged to do so prior to proceeding with this instructional document.
3. You'll be adding section restrictions to a section on Schedule Restrictions (SSARRES). Click on:
   A. Banner
   B. Student (*STUDENT)
   C. Class Schedule (*SCHEDULE)
   D. Schedule Restrictions (SSARRES)
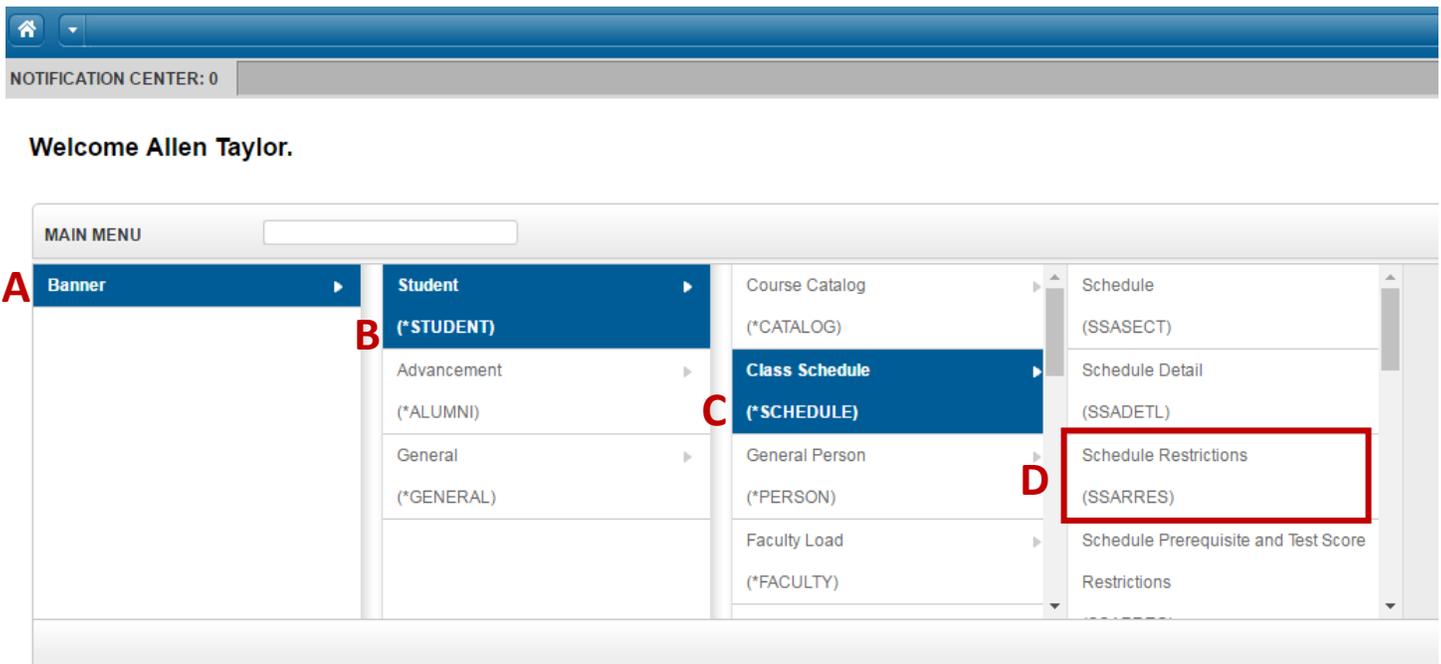
OR you can also type the name of the form (SSARRES or Schedule Restrictions) into the Go To box on the MAIN MENU bar for quick access.
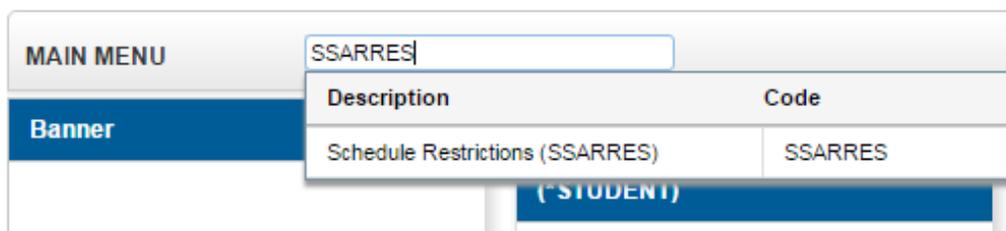
4. Enter the term code and CRN of the section you wish to modify and click Go. [Go]
5. You will see the restriction options as tabs along the top. Each tab will be explained in more detail below, but first, a **note about restrictions**:
   a. Restrictions are cumulative (i.e. all restrictions are taken into account when determining whether a student can register for the section). However, each restriction does not verify itself against any of the other restrictions so the system will allow you to include CE (department), but exclude EN (college) so only students who are in the civil and environmental engineering department **but are not** in the college of engineering and applied sciences can enroll in the section (and yes, this would exclude every student from enrolling in the course as that combination is not possible).
   b. Restrictions are only required if you wish to restrict enrollment in the section to a certain population of students or exclude a certain population of students from enrolling in the section.
   c. Restrictions are based upon characteristics of the student in Banner (e.g. it is the department of the student's major program) and takes into account what those characteristics will be in the semester for which the student is registering (e.g. a student who will have a sophomore classification in spring semester [based upon earned hours and fall registered hours] will be excluded from courses that are set to only include freshman in the spring.).

Department	Field of Study	Class and Level	Degree and Program	Campus and College	Student Attribute and Cohort
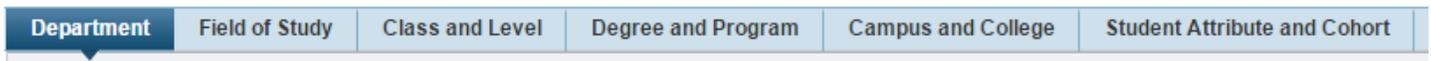
6. With the exception of Field of Study, all restrictions are added using the same method. Let's look at Department as an example. On the Schedule Restrictions form, under the Department tab, you'll add any department restrictions for the section. First, you'll select to either include or exclude department(s) from the section. The choice of include or exclude applies to all of the departments listed. Once you've made a selection, Click Insert to add a department code (either Insert button will work). If you don't know the department code, you can search for it using the Lookup button. [...]

Department	Field of Study	Class and Level	Degree and Program	Campus and College	Student Attribute and Cohort

▼ DEPARTMENT RESTRICTIONS   ➕ Insert   ➖ Delete   ⧉ Copy   ▼ Filter

Include/Exclude   ○ Include ● Exclude

Department
No Records to Display
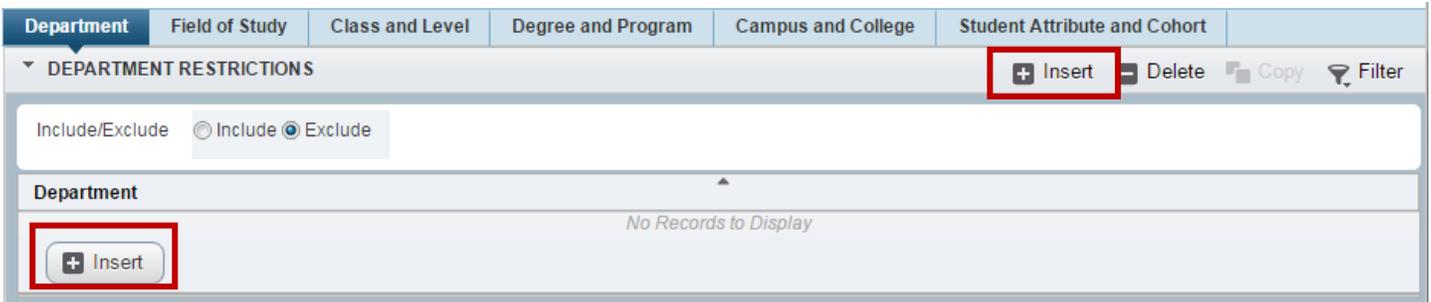
➕ Insert

7. To add additional departments, repeat step 6 to insert another line. To delete a department that was entered incorrectly, click on the line to highlight it and click the Delete button. [➖ Delete]
8. Once you've finished adding departments, be sure to save your changes using the Save button in the bottom, right corner.
9. Now that you have an understanding of how to add restrictions, let's look at each tab in more detail to get an understanding of the purpose of each one.
   a. **Department**—students who have a declared major in a particular department(s).
   b. **Field of Study**—students who have declared particular majors or minors. See appendix A for a more detailed explanation of how this particular restriction functions.
   c. **Class**—students who have a particular classification (e.g. freshman, sophomore, junior, etc.). Classification is calculated in Banner based upon earned hours and restrictions are based upon expected classification for the upcoming term (i.e. earned plus current term registered hours).
   d. **Level**—students who have a particular level (e.g. UG or GR).
   e. **Degree**—students who have declared a particular degree (e.g. BA, MBA, etc.)

f. **Program**—students who have declared a particular program in Banner terms. In Banner, a program encompasses the degree and the major (e.g. BA is a program that includes the BA degree and all of the majors available in that degree).

g. **Campus**—students who are associated with a particular campus. This is most often used to include/exclude distance learning students from a section (D campus).

h. **College**—students who are associated with a particular college.

i. **Student Attribute**—students who have a particular student attribute on their student record. Attributes are used by a variety of offices across campus to code information about a student. While you will see a number of choices under this, most should not be used to restrict student section registration as all of those attributes are not necessarily maintained during the life of the student.

j. **Cohort**—students who have a particular cohort code. Like attributes, these are used by offices for a variety of reasons across campus. This restriction is most often used to restrict a section to a particular class year (e.g. incoming first year students in fall 2016 would have a cohort of 1640UGFR).

A final note about restrictions: The more restrictions you add to a section, the more difficult it will be for students to register for the section. Students must meet all of the criteria imposed by the restriction (e.g. undeclared students will not be able to register for a section if there is a required major restriction attached to the section). After adding restrictions, be sure to verify your data entry using the Sections by Term & Subject with Restrictions Argos report.

Congratulations!

You've successfully added restrictions to a section. Explore the other Banner XE guides to learn how to add instructors, section text, or cross-listings or click the Start Over button ⬛ **Start Over** near the top to add degree program attributes to another section.

Banner XE – Modifying a Section Restriction

1. Follow steps 1-5 in this guide to access the Restrictions menu on Schedule Restrictions (SSARRES).
2. Select the tab for the restriction you wish to modify. Delete incorrect restrictions by clicking on a line to highlight the incorrect restriction and click the Delete button. ⬛ Delete
3. Once you've finished deleting section restrictions, be sure to save your changes using the Save button in the bottom, right corner.

Appendix A – Field of Study Restrictions

In Banner, fields of study are defined as majors, minors, and concentrations. Currently, our use of concentrations is limited to a handful of graduate certificates. Field of Study restrictions are slightly different from the other available restrictions. For each Field of Study restriction, you must first decide if you are planning to include or exclude a particular MAJOR, MINOR, or both (all field of study types) before you can add fields of study.

Department	Field of Study	Class and Level	Degree and Program	Campus and College	Student Attribute and Cohort

▾ FIELD OF STUDY RESTRICTIONS   ➕ Insert ➖ Delete ▭ Copy ⧩ Filter

Include / Exclude	All Field Of Study Types	Field of Study Type
	No Records to Display	

➕ Insert

▾ Field of Study Restrictions   ➕ Insert ➖ Delete ▭ Copy ⧩ Filter

Field of Study Code
No Records to Display

1. Under Include/Exclude, select Insert to insert a row, and, under Field of Study Type, choose either MAJOR or MINOR. If the codes for both the major and minor are the same and you want to include/exclude both, you can check the All Field of Study Types checkbox.

Include / Exclude	All Field Of Study Types	Field of Study Type	
⦿ Include ◯ Exclude	☐	MAJOR	Major

➕ Insert

2. Under Field of Study Restrictions, select Insert to insert a new, and then choose the appropriate major or minor codes to include/exclude from the section. Again, you can use the Lookup button if you are unsure of what codes to select. To add another major or minor code, select the Insert button again.

▾ Field of Study Restrictions   ➕ Insert ➖ Delete ▭ Copy

Field of Study Code
[   ] ...

➕ Insert

3. If you want to include different major and minor codes, you will need to insert two different rows in the Include/Exclude area. One row will be for the MAJOR Field of Study Type and the second row will be for the MINOR Field of Study Type.

First row (MAJOR) is highlighted and shows Field of Study Restrictions for CHE and ECE.

Second row (MINOR) is highlighted and shows Field of Study Restrictions for ENGR.

4. Once you've finished adding fields of study, be sure to save your changes using the Save button in the bottom, right corner.