COMMITTEES AND COMMITTEE SERVICE QUERY AND NAVIGATION

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REVISION HISTORY

Version	Date	Name	Description
1.0	12/2015	Kara Oswood	Final

INTRODUCTION AND PURPOSE

The purpose of this document is to explain how committee information is recorded and viewed in Banner. After reviewing this information, users will be able to enter data, query data, and understand all aspects of committees in Banner. SHACOMI is the data entry form and contains information for graduate student related and other types of committees. The SHICMBQ, SHICOMQ, and SHICMID forms allow users to query committee membership information.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

Graduate Council policies regarding committee membership will be enforced. Some committee types are available for department use.

Only the Graduate Division Academic Affairs Office is permitted to create and make changes to the following committees:

1. Oral Qualifying Exam Committee – PhD Students
2. Dissertation Committee – PhD Students
3. Thesis Committee – Master's Students

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

The Graduate Division Academic Affairs Office will primarily use this form. Major Advisors for graduate students have authorization to create department specific committees and query committee information. Academic Personnel staff in the college offices can access the query forms to complete academic personnel files.

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbxe.ucr.edu) to follow along.

FORMS

The forms listed below are covered in this training.

Form	Form Name	Description
SHACOMI	Committee/Service	This form is used to create and maintain committee/service information by type or by type and ID. Therefore, a committee or service may be stand alone or affiliated with a person. It is also used to create and maintain committee/service membership activity and committee/service comments.
SHICMBQ	Committee/Service Member Inquiry Form	This form allows the user to query on committee/service members and see all the committees for which they are a participant, or all members of a particular role, (i.e., all chairmen of committees), or all committee members from a department, or all members of a particular committee by committee name.
SHICOMQ	Committee/Service Inquiry Form	This query form allows the user to see all the committees/services and their associated members. Data may be sub-queried, based on committee/service type, college, department, or status. Committee records returned in the query may be scrolled through and their members viewed. This is a standalone query form which may also be accessed from the *GSTUDENTB menu.
SHICMID	Committee/Service By Person Inquiry Form	This form allows the user to see all the committee/service information for the particular student indicated in the Key Block, including committees on which the student is a member and committees that are associated with the student. This is a standalone query form which may also be accessed from the *GSTUDENTB menu.

PROCEDURES

CREATE A COMMITTEE (SHACOMI)

STEPS

KEY BLOCK

1. **Committee/Service Type**
   a. Determine the type of committee you would like to create.
   b. If you know the code for the committee type, enter it here. If not, click the **down arrow** for a list of valid codes.
2. **Associated ID**
   a. This is the SID of the student the committee is being created for.
   b. Open the person search by using the **down arrow** or enter the SID directly into the **Associate ID** field.
   c. **NEXT BLOCK**

ENTER COMMITTEE/SERVICE INFORMATION

1. **Date Initiated**
   a. This date will fill automatically with the current date. It should reflect the date a committee was created.
   b. You can adjust it by clicking the calendar to the right or entering a date directly into the field.
2. **Status**
   a. Active
      i. Typically the status first chosen when a committee is created.
      ii. For Graduate Division Academic Affairs Committees, active means:
         1. Oral Qualifying Exam nomination form processed and approved.
         2. First attempt at Oral Qualifying Exam was a fail, second attempt pending.
         3. Dissertation/Thesis Committee approved but final defense and/or graduation has not yet occurred.
   b. Completed
      i. Exam was completed and passed or
      ii. Committee duties have been completed.
   c. Inactive
      i. Committee was approved, but is no longer needed. For example, the student has withdrawn from the university.
      ii. Degree objective has changed and exam type is no longer appropriate.
   d. Pending
      i. Information about the committee membership has been received, the data has been entered, but the committee is not officially approved.

3. **Print on Transcript**
   a. Do **not** check this box. Committees are not printed on the transcript.
4. **Dissolved/Date Dissolved**
   a. Date Dissolved is used to record the date the exam took place.
   b. Both the date and Dissolved check box must be populated.
   c. Leave these fields blank until the exam is complete.
5. **District/Division**
   a. This field is **not** being used, always leave blank.
6. **Home College**
   a. The home college of the **Associated ID** in the key block.
   b. Enter the code or use the **down arrow** to find a list of values.
   c. **Never** use GD for the college in this field.
7. **Home Department**
   a. The home department of the **Associated ID** in the key block.
8. **SAVE** before moving to the **NEXT BLOCK**

ENTER COMMITTEE/SERVICE MEMBERS

1. **Member**
   a. Enter the ID or click the down arrow to conduct a person search for the committee member.
2. **Role**
   a. Choose the appropriate role for that committee member.
   b. Available roles are:
      i. Advisor
      ii. Chairperson
      iii. Co-Chairperson
      iv. Member
      v. Outside Member
      vi. Proxy
      vii. Removed
3. **Status**
   a. **Status** for each member must match the status in the **Committee/Service information** block.
   b. Unless a committee member is **Removed**, then the status for that member will be **Inactive**.
4. **Participation From-To**
   a. The period of time a committee member participated in the committee.
   b. Active committees should have a **To date** of December 31, 2099 (aka "The End of Time").
   c. When the exam or committee service is complete and the committee dissolved, the **To date** must be updated to match the **Date Dissolved**.

5. **District/Division**
   a. This field is not being used, always leave blank.
6. **Home College**
   a. Home college of the committee member.
   b. If the member is not affiliated with UCR, use 00 – No College Designated
   c. Never use GD for the college in this field.
7. **Home Department**
   a. Home department of the committee member.
   b. If the committee member is not affiliated with UCR, use 0000 – Undeclared.
8. To add committee members beyond the first two, choose *Record* from the toolbar then *Insert*.
9. Use the **scroll bar** on the right to view all committee members.
10. When removing a member, update their role to *Removed* and status to *Inactive*. If a record of committee member changes is not needed, a member may be completely removed from the committee using *Record* from the toolbar then *Remove*.

11. **Comments**
    a. **NEXT BLOCK** for the comment screen within **SHACOMI**.
    b. The Graduate Division Academic Affairs Office will use the comment section to record information regarding remote participation, proxy approval, and non-UCR committee member details.
    c. Comments should be brief and use standardized text or key words. Keeping the comments standard will assist a report searching for a particular type of comment is needed. For example, all comments regarding a proxy will include the word "proxy."
12. **NEXT BLOCK** again to return to the original form.

COMMITTEE SERVICE QUERY AND NAVIGATION

There are three query forms related to SHACOMI. All three allow you to find similar information. What you're looking for and how you prefer to view the data will determine which query form to use.

SHICMBQ – COMMITTEE/SERVICE MEMBER INQUIRY

1. Searching by committee member ID or name is the first way to use this form.
   a. Use the left side to focus a search for a specific committee member.
   b. Enter an **ID** or name then **EXECUTE QUERY**.
   c. Information about the committees that person has been on will populate the right side of the form.
   d. Use the **scroll bar** across the bottom to see additional information that was entered in **SHACOMI**.
   e. **Status** on the left side indicates the committee status. **Member Status** is located on the right side.

2. The second way to use the form is to search by any field or combination of fields on the right side, excluding **Associated ID**.
   a. Enter data or use the **down arrow** for a list of values on many of the fields. For example, you can narrow your search to all PhD Dissertation committee chairpersons in the department of Anthropology with an active status. Then **EXECUTE QUERY**.
   b. A list of committee members that match your query will populate the left side of the form.
   c. Use the scroll bar across the bottom to see additional information that was entered in **SHACOMI**.

3. The third way to query is to use both sides of the form to get more focused results. For example, choose an **ID** on the left, then **Active** on the right. That will bring up only committees that member is currently on.

SHICOMQ – COMMITTEE/SERVICE INQUIRY

1. The available fields on this form are similar to **SHICMBQ** but configured differently. One major difference is this form allows you to view all members of the same committee.
   a. The **Committee or Service Identification Data** section allows you to query the Committee or Service Type, **Associated Name**, or **Associated ID**.
   b. Once the **query is executed**, the bottom left portion of the form will show all committee members for the line selected in brown above.
   c. **Scrollbars** below each of the blocks on the right side of the form can be used to view additional information about the highlighted committee.
   d. As with **SHICMBQ**, queries can be made off multiple fields and multiple blocks in the form. The first screen shot below shows all members of Mary's master's comp committee. One member is **Active** and one is **Inactive**.
   e. The second screenshot is a demonstration of how to use both parts of the form together. For example, you can view only the active members of the committee.
      i. **Highlight** the committee you want to work with in the top section and **NEXT BLOCK**.
      ii. Then **ENTER QUERY** to search the fields in the bottom portion of the form.
      iii. Choose **A** in the **Member Status** and **EXECUTE QUERY**.
      iv. Then only the active members of that committee will show.

SHICMID – COMMITTEE/SERVICE BY PERSON INQUIRY

1. This form is very similar to and offers the same functionality as **SHICOMQ**. The main difference is **SHICMID** has a key block and gives information for **only one Associated ID**. Whereas the previous query form can give you information for multiple IDs.

   a. If you leave **Committee Service Type** blank and **EXECUTE QUERY**, all committees for the **Associated ID** in the key block will display.

   b. Once the query is executed, the bottom left portion of the form will show all **Committee/Service Members** for the **Committee Service Type** selected in brown above.

   c. Scrollbars below each of the blocks on the right side of the form can be used to view additional information about the highlighted committee.

   d. As with the two previous query forms, queries can be made off multiple fields.

FINAL QUIZ

1. What office(s) are permitted to create and/or update the oral qualifying exam, thesis, and dissertation committees on SHACOMI?
    a. Graduate Academic Affairs
    b. Academic department staff
    c. Any user with access to SHACOMI
    d. All of the above

    ANSWER: (a) – Graduate Academic Affairs.

2. In the Committee/Service Information block on SHACOMI, what is typically the first status chosen when a committee is created?
    a. Pending
    b. Active
    c. Inactive
    d. Completed

    ANSWER: (b) – Active.

1. How many query forms are available to view committee data?
    a. 1
    b. 2
    c. 3
    d. 4

    ANSWER: (c) – 3.

2. Queries can be made using a combination of fields and blocks on a form.
    a. True
    b. False

    ANSWER: (a) – True.