

Banner Financial Aid

Data Load and Record Creation

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Introductions

- Name
- Organization
- Title/function
- Job responsibilities
- Banner experience
- Expectations

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Course Goals

The goal of this session is to provide you with the knowledge and practice to accurately load data and create and modify student data using the various facilities in the Banner Record Creation module

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Agenda

- Overview
- Set up
- Day-to-Day
- Question and Answer



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Overview

- To explain the day-to-day or operational procedures to handle record creation at your institution
- To use the data load process to load information from application sources
- Topics
 - Interface Data Translation Rules
 - Data Source Code Validation



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Overview, Continued

- Common Matching Process
- Create and Modify General Person Record
- Create and Modify Financial Aid Application Record



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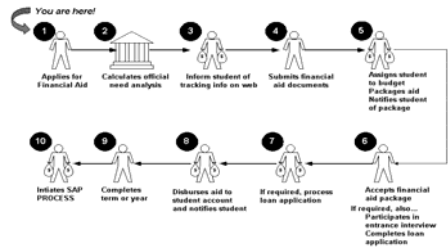
Set up Objectives

At the end of the training session, you will be able to

- explain how to load provided electronic records into Banner through the data load process
- build rules for each record "source" based on processing procedures
- prevent the creation of duplicates when adding person and non-person records using the Common Matching process.



Set up Process



Set up Review

You will be able to answer the following questions:

- What does the data load process do?
- What are the provided records you can load through the data load process?
- What are the procedures of the data load process?



Day-to-Day Review

You will be able to answer the following questions:

- How do you create a Financial Aid record?
- How do you create a General Person record?
- What are the differences between the two records?
- How do you create a student's Financial Aid application, and how do you modify it?



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Course Summary/Review

As a result of this course we will have,

- learned how to use the data load process.
- create and modify student data using the various facilities in the Banner Record Creation module such as;
 - Financial Aid records
 - General Person records



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Questions and Answers





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Thank you for your participation





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