

Banner Interface Banner Student to Banner Advancement Interface Training Workbook

Release 8.0 - April 2008

Updated 04/30/2008



SUNGARD HIGHER EDUCATION

What can we help you achieve?

SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website
<http://connect.sungardhe.com>

Distribution Services e-mail address
distserv@sungardhe.com

Other services

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

Trademark

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.

Revision History Log

Publication Date	Summary
------------------	---------

April 30, 2008	New version that supports Banner 8 software.
----------------	--

Notice of rights

Copyright © SunGard Higher Education 2005-8. This document is proprietary and confidential information of SunGard Higher Education Inc. and is not to be copied, reproduced, lent, displayed or distributed, nor used for any purpose other than that for which it is specifically provided without the express written permission of SunGard Higher Education Inc.



Think before you print.

Table of Contents

Introduction	4
Introduction	5
Course Overview	6
Set Up	Error! Bookmark not defined.
Address Type Code Validation Form (STVATYP)	25
Campus Code Validation Form (STVCAMP)	27
College Code Validation Form (STV COLL)	29
Donor Category Code Validation Form (ATVDONR)	31
Level Code Validation Form (STVLEVEL)	33
Site Code Validation Form (STVSITE)	35
Student Type Code Validation Form (STVSTYP)	37
Term Code Validation Form (STVTERM)	39
Advancement Control Form (AGACTRL)	41
Day-to-Day Operations	43
Rolling Current Students	44
Rolling Non-graduates	49
Rolling Graduated Students	54
Self Check	59
Answer Key	60
Appendix	61
Forms Job Aid	62

Introduction



Course goal

The goal of this course is to provide you with the knowledge and skill to apply the Student to Advancement Interface process to your institution.

Course objectives

In this course you will learn how to

- identify and describe Banner forms and processes used for set up
- create rules and set parameters used to process data
- understand and apply the Student to Advancement Interface process to your respective institution's business practice
- submit the interface process to meet the institution's business practice needs.

Intended audience

Personnel responsible for the Student to Advancement Interface process at your institution.

Prerequisites

To complete this course, you should have completed the Education Practices computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system

Introduction

Considerations before performing the interface

Considerations	Relevant Information/Questions
What important decision(s) must be made regarding the rolling of students?	Minimum semester hours needed and type/level of student
Why must all students have an address?	The form APACONS requires a Preferred Address Type
What process must be in place to handle non-graduated students?	How does your institution identify those students who are non-graduates?
What are the two critical pieces of information that are needed?	Address type and alumnus category code
How often can this process be run?	As often as desired. It will only update records that now meet the criteria. It will NOT update existing records if nothing has changed.

Overview

The Student to Advancement Interface (APPSTDI)

- adds records to Banner Advancement from Banner Student that define individuals as constituents and also updates information on existing constituents
- selects individuals who meet criteria based on the values entered for the parameters.

A person is part of Banner Advancement when information exists for that person on the Advancement Individual Information Form (APACONS). This information includes donor category, preferred class year, preferred college, and preferred address type. If an Advancement Individual record already exists for an individual selected by the Student to Advancement Interface, new academic information for new degree(s) earned as well as activities and employment information are added. However, information that exists in the constituent record is not overwritten including class year on APACONS unless the parameter settings indicate that it should be changed. Parameter 23 to update/change class year allows the user to determine if the values coming from Banner Student should replace the values already in Banner Advancement. The report's output lists all students to be added or updated to Banner Advancement. Parameter 25 allows the user to determine if student records flagged as deceased will be included in the roll.

ID, PIDM, name, all addresses, e-mail, marital status, prefix, suffix, name types, gender, birth date, deceased flag, and confidential flag information is shared among all Banner Systems and therefore is not affected by the interface. APPSTDI adds a donor category to a record to mark it as a constituent. Because a preferred address type is required on APACONS for constituent records, the process will show an error for records that do not have an address. A GTVSDAX rule is used with Parameter 1 which defines the preferred address type for APACONS. The rule and parameter are used together to determine the preferred address type and create a new address record with the address type in Parameter 1. This reduces the possibility of not loading a record into APACONS (and APBCONS table).

Note: This same rule on GTVSDAX will insert a new address record in the address table (SPRADDR) for the address type that equals the first priority address type from Parameter 1. (Example: 1MA represents the first priority address type.) If the incoming Student record has none of the address types defined in Parameter 1 AND has no address with an address type that matches the GTVSDAX rule, APPSSTDI does not load the record and an error message will print on the report.

If available, student cooperative education information is retrieved from SGACoop for employment history if the parameter is set to Y on APPSTDI and added to the Employment History Form (APAEHIS). Parameter 19, if set to Y, creates the employment history on APAEHIS and Parameter 27, if set to Y, allows the user to review this information on APAERVV.

Student activity information from SGASTDN is retrieved and added to the Activities Form (APAACTY) if the parameter20 is set to Y.

Student System background

The grade roll process must be done by the Student system to create Academic History records for students. The two on-line forms are the Class Roster Form (SFASLST) and the Class Attendance Roster Form (SFAALST). The batch process uses the Grade Roll to Academic History Process (SHRROLL). Much of the information created by the grade roll process is used in the Student to Advancement Interface (APPSTDI) such as the term header records, degree records, and hours earned by the student.

Timing of the grade roll and APPSTDI needs to be coordinated with the Registrar's Office. For example, if your institution wants to have students become constituents after their first semester, then APPSTDI must be run after the grade roll to insure that the term header records exist. If no term header record exists for a student, then that student will not be selected in the interface.

Note: After this process has been completed, you will need to follow up with these records and add/update information such as marital status, employment information, children as well as make cross references with other records and link spouse records.

Student categories

All students who have Academic History Term Header records (have had grades rolled for a term) for the term matching the term(s) entered for the **Academic History Terms to Include** parameter 18 (on APPSTDI) are considered for one of the following categories. Individuals who qualify for one of the following categories are added or will have their records updated in Banner Advancement. If the student does not qualify for any one of the categories, processing is stopped on that student.

Graduates: A degree has been awarded.

Non-Graduates: No degree has been awarded, no registration exists as of a specified term, and a minimum number of credits has been earned (i.e., the student is someone who attended and accumulated a certain number of credits, did not earn a degree, and is no longer attending the institution). This is based on credit hour criteria entered into the appropriate parameter.

Currently Enrolled Students: No degree has been awarded, a current registration exists, and a minimum number of credits has been earned or is currently being earned. This is based on credit hour criteria entered into the appropriate parameter.

You can select information for one or more student categories by entering values for a specific set of parameters. The data source for two of the output fields, **Preferred Class** and **Preferred College**, varies with respect to the student category for which information is retrieved.

To select information for more than one category, enter all parameters for each category you want. For the parameters that are needed for more than one category, such as Level of Student, enter a value for each category; each parameter specifies if multiple values can be entered. For example, if you are selecting graduates and non-graduates, you need to enter all levels that graduates and non-graduates may have. Leaving LEVEL parameter blank means it will select all levels.

Parameters for the Student to Advancement Interface (APPSTDI)

When the cursor resides on a Parameter line that allows multiple values, the message will indicate M for Multiple or S for single value; parameters that allow the ORACLE wildcard character (%) are identified with %.

Note: There are specific parameters for selecting each of the three types of records – graduates, non graduates no longer in school, and non graduates still in school.

Parameter	Description
<p>1-Address Priority and Type</p>	<p>Enter the address type priority followed by address type (i.e., <i>1MA, 2PR</i>). This value is used to determine the preferred address type for a constituent as identified on the Constituent Information Form (APACONS). Based on the priority entered, the process looks for an existing address type that matches the parameter value. Address types must exist on the Address Type Code Validation Form (STVATYP). This is a multiple value parameter. The preferred Geographic Region code on APACONS will be updated with the preferred address type.</p> <p>Note: A GTVSDAX rule is used with Parameter 1 which defines the preferred address type for APACONS. The rule and parameter are used together to determine the preferred address type and create a new address record with the address type in Parameter 1. This reduces the possibility of not loading a record into APACONS (and APBCONS table).</p> <p>This same rule on GTVSDAX will insert a new address record in the address table (SPRADDR) for the address type that equals the first priority address type from Parameter 1. (Example: 1MA represents the first priority address type) If the incoming Student record has none of the address types defined in Parameter 1 AND has no address with an address type that matches the GTVSDAX rule, APPSSTDI does not load the record and an error message will print on the report.</p>

Parameter	Description
2 Level of Student	<p>(optional) Enter the level code from the Level Code Validation Form (STVLEVL) of students being extracted. This code indicates the current academic level of the student (e.g., undergraduate or graduate).</p> <p>This is a multiple value parameter.</p>
3 Student Type	<p>(optional) Enter the student type (e.g., New, Continuing, Transfer) from the Student Type Code Validation Form (STVSTYP). This is reviewed when selecting records for currently enrolled students and non-current students.</p> <p>This is a multiple value parameter.</p>
4 Student College	<p>(optional) Enter the college of the student from the College Code Validation Form (STVCOLL). Reviewed when selecting records for currently enrolled students and non-current students.</p> <p>Note: Do not use when selecting graduates.</p> <p>This is a multiple value parameter.</p>
5 Student Campus—	<p>(optional) Enter the campus of the student from the Campus Code Validation Form (STVCAMP). Reviewed when selecting records for currently enrolled students and non-current students.</p> <p>Note: Do not use when selecting graduates.</p> <p>This is a multiple value parameter.</p>
6 Student Site	<p>(optional) Enter the site of the student from the Site Code Validation Form (STVSITE). Reviewed when selecting records for currently enrolled students and non-current students.</p> <p>Note: Do not use when selecting graduates.</p> <p>This is a multiple value parameter.</p>

Parameter	Description
<p>7 Degree College</p>	<p>Enter the college of degree from the College Code Validation Form (STV COLL).</p> <p>Note: Use when selecting graduated students.</p> <p>This is a multiple value parameter.</p>
<p>8 Degree Campus</p>	<p>Enter the campus of degree from the Campus Code Validation Form (STV CAMP).</p> <p>Note: Use when selecting graduated students.</p> <p>This is a multiple value parameter.</p>
<p>9 Date Range Start for Degree</p>	<p>Enter the starting date range for degree to consider for the interface using the DD-MON-YYYY format.</p> <p>Example: 01-JAN-2008 . This would represent the start of the quarter or semester.</p> <p>Note: You can backdate this as far back historically as you wish the first time it is run to coincide with the academic history that student record has.</p>
<p>10 Date Range End for Degree</p>	<p>Enter the ending date range for degree to consider for the interface using the DD-MON-YYYY format.</p> <p>Example: 31-MAY-2008 . This would represent the end of the quarter or semester.</p>
<p>11 Donor Code for Degreed Students</p>	<p>Enter the donor code from the Donor Category Code Validation Form (ATV DONR) that is entered on APACONS for alumni who have been awarded degrees at the institution (as identified on the Degrees and Other Formal Awards Form (SHADEGR)). Example: ALUM</p> <p>Note: Leave this parameter empty if selecting currently enrolled students or non-current students by credit hour.</p>

Parameter	Description
<p>12 Donor Code for Non-deg, Non-stu</p>	<p>Enter the donor code from ATVDONR that will be entered on APACONS for constituents who have not been awarded a degree at the institution, have earned a minimum number of credits, but have not attended the institution since a particular term (e.g., ALND).</p> <p>The minimum number of credits earned and the “last active” term are entered in the next two parameters. Enter this parameter if you wish to extract students who meet this criterion. If this parameter is left empty, the next two parameters should also be left empty.</p> <p>Leave blank if selecting graduates.</p>
<p>13 Min Credit for Non-deg, Non-student</p>	<p>Enter the minimum number of credits for non-degree-awarded, non-current students. This parameter only needs to be entered if the Donor Code for Non-Degree, Non-Students parameter is entered. The minimum number of credits entered as the parameter value is compared with the student’s total hours earned at the institution, as displayed in Total on the Transcript Request Form (SHARQTC).</p> <p>Non-current students who have not graduates are selected if ALL of the following criteria are met based on Banner Student data:</p> <ul style="list-style-type: none"> • Total earned hours are greater than or equal to the value of this parameter. • Term is less than or equal to the value in Parameter 14. • Level of student equals the value of Parameter 2. • GPA type indicator equals I or T.

Parameter	Description
<p>14 Last Active Term for Non-student</p>	<p>Enter the term code for the latest term since the no-degree-awarded students have not been active. The student cannot have an effective term record for any term after (not including) this term. This parameter only needs to be entered if the Donor Code for Non-Degree, Non-Students parameter is entered. Valid terms are found under Values on the Term Code Validation Form (STVTERM).</p> <p>Non-current students are selected if ALL of the following criteria are met based on Banner Student data:</p> <ul style="list-style-type: none"> • SHRTTRM term code is less than or equal to the value of this parameter. • Either SFBETRM term code or SFRSTCR term code is less than or equal to the value of this parameter. • SGBSTDN_TERM_CODE_EFF is less than or equal to the value of this parameter.
<p>15 Donor Code for Non-deg, currently enrolled students</p>	<p>Enter the donor code from ATVDONR that is entered on APACONS for constituents who have not been awarded a degree at the institution, but have earned a minimum number of credits, and are currently attending the institution (e.g., STDN).</p> <p>The minimum number of credits and the current term are entered as the next two parameters. Enter this parameter to extract students who meet these criteria. If this parameter is not entered, then the following parameter should be left empty.</p>

Parameter	Description
<p>16 Min credit for curr. students</p>	<p>Enter the requirement for the minimum number of credits earned. This parameter does not need to be entered if the Donor Code for Non-Degree Students parameter is left empty.</p> <p>Note: The institution credit hours earned by the student are displayed on SHARQTC.</p> <p>Currently enrolled students are selected if ALL of the following criteria are met based on Banner Student data:</p> <ul style="list-style-type: none"> • Total earned hours are greater than or equal to the value of this parameter. • Term is less than or equal to the value of Parameter 17. • Level of student equals the value of Parameter 2. • GPA type indicator equals I or T.
<p>17 Current Term-Students/Non Grad</p>	<p>Term for currently enrolled students. Valid values are found on STVTERM. Academic history hours up to and including the current term will be totaled.</p> <p>Currently enrolled students are selected if BOTH of the following criteria are met based on Banner Student data:</p> <ul style="list-style-type: none"> • Either SFBETRM term code or SHRTTRM term code equals the value of this parameter. • SGBSTDN_ERM_CODE_EFF is less than or equal to the value in this parameter.
<p>18 Academic Hist. terms to include</p>	<p>Enter a specific term or use the wildcard. All students to be considered for the interface must have a term header record in the Term Header information on the Term Course Maintenance Form (SHAINST) for the term entered. This means that students to be considered must have grades for the term(s) and those grades must have been rolled to academic history.</p> <p>This parameter is the FIRST selection criteria for all records selected for inclusion in the process.</p>

Parameter	Description
<p>19 Create Empl. History</p>	<p>Enter <i>Y</i> or <i>N</i> to create or not create employment history data on the Employment History Form (APAEHIS) from the Cooperative Education Form (SGACOOB). If <i>Y</i> is entered here and <i>U</i> is entered for the Update Database parameter 21, then employment history records will be created. Parameter 27 should be used in conjunction with this one to indicate if the employment records should be reviewed via APAERVW or should go directly to APAEHIS. A "Y" in that parameter indicates that it will be reviewed on APAERVW and an "N" indicates that it will go directly to APAEHIS.</p> <p>Default is N.</p>
<p>20 Create Activities</p>	<p>Enter <i>Y</i> or <i>N</i> to apply or not apply adds/updates to activities in the Advancement database from Student Activities window of SGASTDN and the Student Sport information on the Student Sport Form (SGASPRT). If <i>Y</i> is entered here, and <i>U</i> is entered for the Update Database parameter, then activity information will be created or updated on APAACTY. Note: years and leadership values are NOT updated on APAACTY since that information is not stored in SGASTDN. Default is N,</p>
<p>21 Report or Update</p>	<p>Enter <i>R</i> to generate the report output without updating the database. Enter <i>U</i> to apply the adds/updates to the Advancement/ Development database from Banner Student and produce a report of all of the adds/updates.</p>
<p>22 Use Year of Grad date</p>	<p>Enter <i>Y</i> so that the preferred class year on APACONS should be loaded from the year of the graduation date (SHRDGMR_GRAD_YEAR). Enter <i>N</i> if the preferred class year on APACONS should be loaded from the graduation year (SHRDMGR_ACYR_CODE). <i>N</i> is the default value. This parameter is used when selecting graduates only.</p>

Parameter	Description
<p>23 Update College/Class Yr</p>	<p>Enter Y to update existing values in Banner Advancement. Enter N (default) to NOT update existing values. For example, if a year has already been assigned to the Advancement record, should it be changed to a value that is now in Student.</p> <p>Y – Update existing value in Advancement. If an existing Advancement value is all zeroes, the existing non-zero value is NOT replaced. (class shows 2000 but the incoming value is 0000). If an existing Advancement value is zero and the incoming Student value is non-zero, the incoming Student value updates the Advancement value.</p> <p>N – Do not update existing value in Advancement. This is the default value.</p> <p>If there are records eligible for preferred college code or preferred class year updates, a new exception report is generated. This report, called the Student-Advancement Interface Optional Updates for Manual Review, provides details for those records where the college code OR class year coming from Student is different from the college code or class year already in Advancement. You can review this report and manually update any records that should be changed.</p>
<p>24 Alternate College Value for 00</p>	<p>(optional) Some institutions allow Banner Student to store a default college code of 00 for graduates. Previously, these records could not be loaded to Banner Advancement. If no value is entered for this parameter and APPSTDI encounters a 00 college code in Student, an error message is printed on the report and the record is not loaded to Advancement. The 00 value is replaced by any value entered into this parameter.</p> <p>Valid values are listed on the College Validation Table STV_COLL under Values.</p>
<p>25 Inc Deceased Students</p>	<p>(optional) Enter Y to load records for deceased students. Enter N to NOT load records. Default value is N.</p>

Parameter	Description
<p>26 Status of Stu Recs to Exclude</p>	<p>(optional) Enter status codes for those students for which records should NOT be loaded from Banner Student to Banner Advancement.</p> <p>Example: Exclude withdrawn or inactive students. Valid values are listed on STVSTST. Process uses SGBSTDN_STST_CODE to determine student's status.</p> <p>Note: Applies to the review of currently enrolled students only.</p> <p>Multiple values can be entered.</p>
<p>27 Review Employment Records</p>	<p>Enter <i>Y</i> to load cooperative employment record from SGACOOB to APAERVW for review. Enter <i>N</i> (default) to load records directly to APAEHIS. This parameter is used in conjunction with Parameter 19. This is a required parameter.</p> <p>Note: There is a new checkbox on APAEHIS to indicate that the employment record is either an internship or a cooperative education experience.</p>
<p>28 Insert Address Name Details</p>	<p>This parameter determines how the address name details on APANAME are loaded. Enter <i>F</i> to load name with full middle name. Enter <i>I</i> to load name with middle initial only. Enter <i>N</i> if the address name should NOT be populated. Default is <i>N</i>.</p> <p>Note: Existing data in that field is NOT overwritten even if <i>F</i> or <i>I</i> values are used in this parameter.</p> <p>Note: If the full name is longer than 120 characters, a message on the output report indicates that the full name was NOT loaded to APANAME (APBCONS table).</p>

Parameter	Description
<p>29 Salutation Code for Salu Value</p>	<p>(optional) This parameter specifies which salutation type code is loaded with the salutation name. If this parameter is used, then both the salutation type code (from ATVSALU) and the salutation name are loaded to APAMAIL. Enter a salutation type code from the values to load salutation records on APAMAIL. Leave blank if no salutation information should be loaded.</p> <p>The salutation name is loaded as follows:</p> <ul style="list-style-type: none"> • If SPBPERS_SEX is F then the salutation prefix is Ms with the last name. See parameter 35 to determine if punctuation should be applied. • If SPBPERS_SEX is M then the salutation prefix is Mr with the last name. See parameter 35 to determine if punctuation should be applied. • If SPBPERS_SEX is not known/null, no prefix is loaded. Only the first and last names are loaded. <p>Note: A salutation type code is not loaded if the ID already has a salutation type code on APAMAIL for the value chosen for this parameter. The output report displays a message when this occurs.</p>
<p>30 Sort Report</p>	<p>This parameter determines how selected records are sorted on the report. This parameter is optional but if left blank, N or do not sort records is the default.</p> <p>Enter A to sort alphabetical by last name then first name. Enter B to sort by ID.</p> <p>Enter C to sort by college and degree, then alphabetical by last name then first name.</p> <p>Enter N (default) to NOT sort.</p>
<p>31 Student Degree</p>	<p>(optional) Enter degree code to identify, select and load <i>currently enrolled</i> students. This parameter is optional. Multiple values can be entered and valid values are listed on the Degree Code Validation Form STVDEGC.</p>

Parameter	Description
32 Awarded Degree	(optional) Enter degree code to identify, select and load <i>graduates</i> (students with a degree record). This parameter is optional. Multiple values can be entered and valid values are listed on the Degree Code Validation form STVDEGC.
33 Student Major	(optional) Enter major, minor, concentration code to identify, select and load <i>current</i> students. This parameter is optional. Multiple values can be entered and valid values are listed on the STVMAJR form.
34 Degree Major	(optional) Enter major, minor, concentration code to identify, select and load <i>graduates</i> . This parameter is optional. Multiple values can be entered and valid values are listed on the STVMAJR form.
35 Incl Punc for Insert Name Recs	<p>This parameter determines whether APPSTDI adds punctuation to Address and Salutation names (parameters 28 and 29) that are updated in Advancement. If a name includes suffix, a comma is always inserted after the last name. If you choose to insert additional punctuation, you must add a GTVSDAX rule that identifies those prefixes and suffixes that should have punctuation included.</p> <p>This parameter is required. Enter Y to use punctuation when loading names to Banner Advancement. Enter N (default) to NOT use punctuation.</p>

Parameters referencing student categories

For these student categories, the following parameters need defined in APPSTDI. Information on how to complete APPSTDI, by student category, will be covered later in this workbook.

Note: For those marked as optional, ALL levels etc. will be selected

Graduates	Non-graduates	Currently enrolled Students
1. Address Priority and Type	1. Address Priority and Type	1. Address Priority and Type
2. (optional) Level of Student	2. (optional) Level of Student	2. (optional) Level of Student
	3. (optional) Student Type	3. (optional) Student Type
	4. (optional) Student College	4. (optional) Student College
	5. (optional) Student Campus	5. (optional) Student Campus
	6. (optional) Student Site	6. (optional) Student Site
7. (optional) Degree College		
8. (optional) Degree Campus		
9. Date Range Start for Degree		
10. Date Range End for Degree		
11. Donor Code for Degreed Students		
	12. Donor Code for Non-Degreed, Non-Students	

Graduates	Non-graduates	Currently enrolled Students
	13. Minimum Credits for Non-Degreed, Non-Students	
	14. Last Active Term for Non-Students	
		15. Donor Code for Non-Degreed, Students
		16. Minimum Credit for Current Students
		17. Current Term – Students /Non Grad
18. Academic History Term(s) to Include or wildcard		Note: Academic information is not updated if selecting records by credit hour.
19. Create Empl. History	19. Create Empl. History	19. Create Empl. History
20. Create Activities	20. Create Activities	20. Create Activities
21. Report Mode or Update Mode (report always generated)	21. Report Mode or Update Mode (report always generated)	21. Report Mode or Update Mode (report always generated)
22 Use Year of Grad Date	22 Use Year of Grad Date	22 Use Year of Grad Date
23 Update College/Class Year	23 Update College/Class Year	23 Update College/Class Year
24 Alternate College Value for 00		
25 Include Deceased Students	25 Include Deceased Students	25 Include Deceased Students
		26 Status of Current Student Records to Exclude

Graduates	Non-graduates	Current Students
27 Review Employment Records	27 Review Employment Records	27 Review Employment Records
28 Insert Address Name Details	28 Insert Address Name Details	28 Insert Address Name Details
29 Salutation Code for Salu Value	29 Salutation Code for Salu Value	29 Salutation Code for Salu Value
30 Sort Report	30 Sort Report	30 Sort Report
		31 Student Degree
32 Awarded Degree		
		33 Student Major
34 Degree Major		
35 Include Punctuation for Insert Name Record for Address Name and Salutation	35 Include Punctuation for Insert Name Record for Address Name and Salutation	35 Include Punctuation for Insert Name Record for Address Name and Salutation

Error messages

What follows is a list of pre-defined error messages generated from APPSTDI. You will automatically receive one of these messages should the appropriate information not be entered or unavailable for processing.

```
***** WARNING ***** Invalid Academic Year -
```

```
Degree record added without valid Academic Year
```

```
Institution Code on the Advancement Control Form (AGACTLR) has not been entered. Please enter this code and rerun report.
```

```
Required parameter is missing, aborting job.
```

```
Run sequence number is invalid, aborting job.
```

Report output

The report output contains the following information: ID, name, status, donor category code, preferred address, preferred class year, and preferred college. It also includes indicators as to whether:

- employment and activity information was interfaced (Y if yes, empty if no)
- a secondary curriculum exists (Y if yes, empty if no)
- more than five honors exist (Y if yes, empty if no)

An institution code of the school where a degree was received, the degree, and a college where a degree was received is included on the report. The status indicates if the student is being added as a constituent (ADD) or is already a constituent and is being updated (UPD).

In addition, two totals sections are available.

- Student-Advancement Interface Results Summary
- Overall Summary Details

The **Student-Advancement Interface Results Summary** identifies the number of records processed:

- New records loaded from Banner Student to Banner Advancement
- Banner Advancement records updated with additional details from Banner Student
- Banner Student records that could not be loaded (failed) due to missing required data
- Total records processed

```
*** STUDENT-ADVANCEMENT INTERFACE RESULTS SUMMARY ***  
Number of New Student Records Processed 22  
Number of Updated Student Records Processed 0  
Number of Failed Student Records Processed 0  
  
Total Records Processed: 22
```

The **Overall Summary Details** reports the number of new and updated database records:

- Degree records inserted and updated
- Activity records inserted
- Employment records inserted (if Parameter 27 is set to N)
- Internship and Cooperative Education records inserted (if Parameter 27 is set to Y)

```
* * * OVERALL SUMMARY DETAILS * * *  
Degree Records - New Records Inserted 10  
Degree Records - Updated 26  
  
Activity Records - New Records Inserted 31  
  
Employment Records - New Records Inserted 8  
NOTE: No cross references created
```

Set Up



Section goal

The goal of this section is to outline the set-up process and detail the procedures to set-up Banner Advancement to run the Student to Advancement Interface (APPSTDI).

Objectives

In this section you will learn how to

- identify and describe Banner forms and processes used for set up
- create rules and set parameters used to process data.

Address Type Code Validation Form (STVATYP)

The Address Type Code Validation Form (STVATYP) lets you define address types and descriptions, and their default telephone type(s).

Note: Those tables starting with "S" are shared tables.

View

Address Type	Description	Telephone Type	Description	System Required	Activity Date
BP	Third Party Billing	BI	Billing	<input type="checkbox"/>	13-NOV-2006
AP	Accounts Payable Address	BI	Billing	<input type="checkbox"/>	22-JAN-1998
BI	Billing	BI	Billing	<input checked="" type="checkbox"/>	03-MAY-1991
BU	Business	BU	Business or work	<input checked="" type="checkbox"/>	03-MAY-1991
CK	Check Address	BI	Billing	<input type="checkbox"/>	31-DEC-1997
CO	Correspondence	CO	Correspondence	<input type="checkbox"/>	21-NOV-1998
CU	Grandparents Address			<input type="checkbox"/>	01-DEC-2004
CW	Home Address 2	BI	Billing	<input type="checkbox"/>	20-JAN-1998
DM	Mail Diploma To			<input type="checkbox"/>	07-DEC-2006
EM	Emergency Contact	EMER	Emergency Contact	<input type="checkbox"/>	30-MAR-1995
FA	Firm Address	FA	Firm Address	<input type="checkbox"/>	01-AUG-1991
FI	Financial Aid	FI	Financial Aid	<input type="checkbox"/>	25-AUG-1999
FR	Foreign			<input type="checkbox"/>	22-OCT-2007
GR	Graduation Correspondence	GR	Graduation	<input type="checkbox"/>	10-APR-2005
GV	Grand Valley			<input type="checkbox"/>	09-SEP-2004
HQ	Corporate Headquarters	HQ	Corporate Headquarters	<input type="checkbox"/>	03-JUN-1990
JJ	Parent Address	P1	Parent 1	<input type="checkbox"/>	01-DEC-2004
KA	Next-of-Kin	KA	Next-of-Kin	<input type="checkbox"/>	21-NOV-1998
LK	Locker Numbers			<input type="checkbox"/>	08-JUN-2004
LO	Local Address			<input type="checkbox"/>	09-APR-1998
MA	Mailing	MA	Mailing	<input checked="" type="checkbox"/>	03-MAY-1991
MB	Mail Box Numbers			<input type="checkbox"/>	08-JUN-2004

Steps

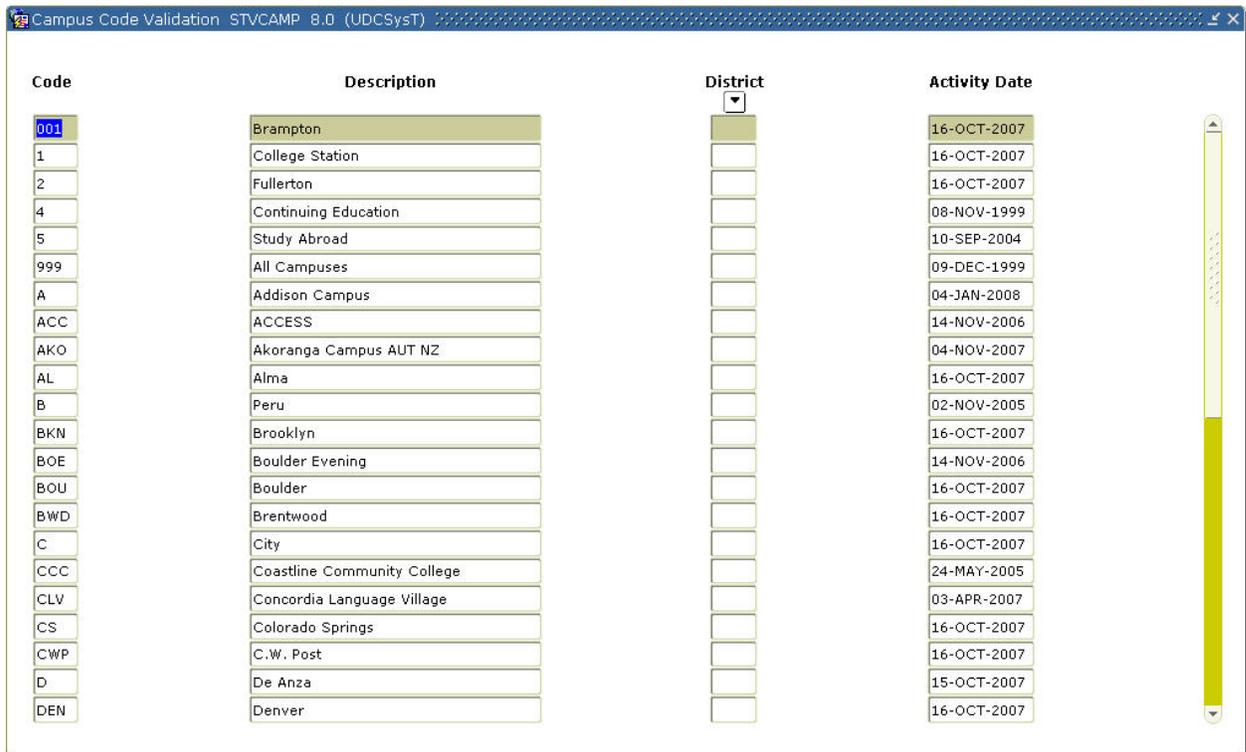
1. Access the Address Type Code Validation Form (STVATYP).
2. If a new address type is needed, click the **Insert Record** icon.
3. Enter an address type code in the **Address Type** field.
4. Enter a description of the address type in the **Description** field.
5. Enter a telephone type code in the **Telephone Type** field.
6. Enter a description of the telephone type in the **Description** field.
7. The **Activity Date** field defaults to today's date when saved.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Campus Code Validation Form (STVCAMP)

The Campus Code Validation Form (STVCAMP) is used to define codes that identify the campuses within your institution.

Example: Main campus and Downtown campus.

View



Code	Description	District	Activity Date
001	Brampton		16-OCT-2007
1	College Station		16-OCT-2007
2	Fullerton		16-OCT-2007
4	Continuing Education		08-NOV-1999
5	Study Abroad		10-SEP-2004
999	All Campuses		09-DEC-1999
A	Addison Campus		04-JAN-2008
ACC	ACCESS		14-NOV-2006
AKO	Akoranga Campus AUT NZ		04-NOV-2007
AL	Alma		16-OCT-2007
B	Peru		02-NOV-2005
BKN	Brooklyn		16-OCT-2007
BOE	Boulder Evening		14-NOV-2006
BOU	Boulder		16-OCT-2007
BWD	Brentwood		16-OCT-2007
C	City		16-OCT-2007
CCC	Coastline Community College		24-MAY-2005
CLV	Concordia Language Village		03-APR-2007
CS	Colorado Springs		16-OCT-2007
CWP	C.W. Post		16-OCT-2007
D	De Anza		15-OCT-2007
DEN	Denver		16-OCT-2007

Steps

1. Access the Campus Code Validation Form (STVCAMP).
2. Click the **Insert Record** icon to add a campus.
3. Enter a campus code in the **Code** field.
4. Enter the location of the campus in the **Description** field.
5. (optional) Enter the district associated with the campus in the **District** field.
6. The **Activity Date** field defaults to today's date when saved
7. Click the **Save** icon.
8. Click the **Exit** icon.

College Code Validation Form (STVCOLL)

The College Code Validation Form (STVCOLL) lets you define the schools and colleges within your institution and specify if a code is required by the system.

Examples of colleges: College of Agriculture and College of Business.

View

Code	Description	Voice Response Message Number	System Required	Canadian Statistics Code	MIS District	Activity Date
00	No College Designated		<input checked="" type="checkbox"/>			29-APR-1987
01	Intcomp College		<input type="checkbox"/>			22-APR-2008
20	Business Finance		<input type="checkbox"/>			08-OCT-2007
99	Not used in standing		<input checked="" type="checkbox"/>			03-JAN-1995
AD	School of Art & Design		<input type="checkbox"/>			02-SEP-1999
AG	College of Agriculture		<input type="checkbox"/>			21-OCT-2005
AH	College of Allied Health		<input type="checkbox"/>			10-JAN-1995
AR	College of Architecture		<input type="checkbox"/>			10-JAN-1995
AS	Arts & Science		<input type="checkbox"/>			16-JUL-2003
AT	School of Applied Technology		<input type="checkbox"/>			06-APR-2005
BA	Business School		<input type="checkbox"/>			21-OCT-2005
BS	Grad School of Biomedical Sci		<input type="checkbox"/>			12-MAY-2006
BU	Business		<input type="checkbox"/>			16-JUL-2003
CB	Business, Arts, Science & Educ		<input type="checkbox"/>			01-NOV-2005
CE	School of Continuing Education		<input type="checkbox"/>			28-NOV-2004
CG	Claremont Graduate		<input type="checkbox"/>			01-OCT-1999
CI	City College - SDCCD		<input type="checkbox"/>			04-NOV-2003
CL	Concordia Language Village		<input type="checkbox"/>			03-APR-2007
CN	Nursing		<input type="checkbox"/>			16-JUL-2003
CO	College of Communications		<input type="checkbox"/>			11-JAN-2002
CP	Adult & Professional Studies		<input type="checkbox"/>			01-NOV-2005

Steps

1. Access the College Code Validation Form (STV_COLL).
2. Click the **Insert Record** icon to add a college.
3. Enter a code for the college in the **Code** field.
4. Enter the college name in the **Description** field.
5. Click the **System Required** checkbox if the code is required.

Note: If the check box is selected, the code cannot be deleted.
6. The **Activity Date** field defaults to today's date when saved
7. Click the **Save** icon.
8. Click the **Exit** icon.

Donor Category Code Validation Form (ATVDONR)

The Donor Category Code Validation Form (ATVDONR) defines donor category codes for advancement individuals and advancement organizations. For advancement individuals, the donor code is assigned on the Advancement Individual Information Form (APACONS); for advancement organizations, the category code is assigned on the Advancement Organization Header Form (AOAORGN).

View

Code	Description	Alumni	Spouse	Friend	Display on Web	VSE	VSE-2	Site Sequence	Report Sequence	Activity Date
ALCH	Alumni Chapter	N	N	N	Y	H	X		12	01-MAR-2004
ALND	Non-degreed Alumna/us	Y	N	N	N	A	N		2	15-SEP-1991
ALUM	Alumna/us	Y	N	N	N	A	D		1	10-JUL-1991
ASIA	Associate Member	N	N	N	N	C	O		86	21-FEB-2000
BORD	Board Member	N	N	Y	Y	C	O		14	01-JUN-2006
BUSA	Business Associate	N	N	N	N	C	O		13	22-NOV-1998
CORP	Corporation	N	N	N	Y	E	O		3	23-JUN-2003
DAF	Donor Advised Fund	N	N	N	N	D	X		30	04-MAR-2007
ESTT	Estate	N	N	N	N	H	E		12	28-FEB-2007
FACT	Faculty/Staff	N	N	N	N	C	F		7	22-NOV-1998
FFOU	Family Foundation	N	N	N	Y	D	P		11	23-JUN-2003
FOUN	Foundation	N	N	N	Y	D	O		10	23-JUN-2003
FRCS	Fund Raising Consortia	N	N	N	N	G	X		15	22-NOV-1998
FRND	Friend	N	N	Y	Y	C	O		9	23-JUN-2003
FSIA	Fellowship Member	N	N	N	N	C	O		88	21-FEB-2000
GMEM	Governing Board	N	N	N	N	C	G		16	22-NOV-1998
GOVR	Government Relations	N	N	Y	N	X	X		31	12-NOV-2007
LAW	Law Firm	N	N	N	Y	E	O		20	09-JUN-2004
MNTR	Mentor	N	N	Y	Y	C	O		60	05-MAR-2007
ORGN	Other Organization	N	N	N	N	H	X		18	22-OCT-2002
OTHR	Other	N	N	N	N	C	O		19	22-NOV-1998

Steps

1. Access the Donor Category Code Validation Form (ATVDONR).
2. Click the **Insert Record** icon to add a new code.
3. Enter a code for a donor category in the **Code** field.
4. Enter a description of the donor category in the **Description** field.
5. Enter *Y* in the **Alumni** field for a category code that represents alumni status and *N* or blank for the others.
6. Enter *Y* in the **Spouse** field a spouse and *N* or blank for the others.

Note: The **Friend** field indicates which donor codes are designated as Friends and should have Advancement Self-Service for Alumni and Friends. No donor code is allowed to have both the Advancement indicator and this indicator set to *Y*.

7. Enter *Y* in the **Display on Web** field if the donor code should be available for selection from Self-Service for Alumni and Friends for friends who do not have a Banner ID.

Note: Three fields on this form correspond to VSE reporting: **VSE**, **VSE-2**, and **Report Sequence**. The **VSE**, **VSE-2**, and **Report Sequence** columns correspond to the VSE Report (ADPVSER).

8. Select or enter the appropriate value in the **VSE** field. Note: This references ATVVSER table.)
9. The **VSE-2** field maps to a subgroup within a source (i.e., VSE field). Select or enter the appropriate value in the **VSE-2** field.

Note: Values in the Site Sequence column represent institutionally defined purposes and can be left blank.

10. Enter a sequence number in the **Report Sequence** field.

Note: If a donor has more than one category code, the primary category code is the one with the lowest value entered in **Report Sequence**.

11. The **Activity Date** field defaults to today's date when saved.
12. Click the **Save** icon.
13. Click the **Exit** icon.

Level Code Validation Form (STVLEVL)

The Level Code Validation Form (STVLEVL) is used to enter the level code. Multiple values can be entered.

Examples: No Level Declared, Undergraduate, and Non-Matriculated, Graduate, Non-Credit.

View

Level Code	Description	CEU Indicator	Voice Message	EDI Equivalent	System Required	Activity Date
00	Undeclared	<input type="checkbox"/>			<input checked="" type="checkbox"/>	24-JUN-1991
AP	Apprenticeship	<input type="checkbox"/>			<input type="checkbox"/>	06-APR-2005
BJ	Cooperative Education	<input type="checkbox"/>			<input type="checkbox"/>	21-OCT-2005
CE	Continuing Education	<input checked="" type="checkbox"/>			<input type="checkbox"/>	03-JAN-1995
CR	Credit	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
DV	Developmental	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
ED	Employee Development	<input checked="" type="checkbox"/>			<input type="checkbox"/>	13-OCT-2005
EM	Employee	<input type="checkbox"/>			<input type="checkbox"/>	02-SEP-1999
GP	Graduate Professional	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
GR	Graduate	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
HS	High School	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
IB	Int'l Baccalaureate	<input type="checkbox"/>			<input type="checkbox"/>	26-SEP-2006
IN	ESL	<input type="checkbox"/>			<input type="checkbox"/>	03-NOV-2006
JP	Joint Degree Program	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
LW	Law	<input type="checkbox"/>		LW	<input type="checkbox"/>	14-DEC-2007
MD	Medical Degree	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
MS	Matriculated Student	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
NC	Non-Credit	<input type="checkbox"/>			<input type="checkbox"/>	13-MAR-2003
NM	Non-Matriculated Student	<input type="checkbox"/>			<input type="checkbox"/>	01-MAY-1998
PG	Postgraduate	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
PR	Professional	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
RE	Regular	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007

Steps

1. Access the Level Code Validation Form (STVLEVL).
2. Enter the level code in the **Level Code** field.
3. Enter a description in the **Description** field.
4. (optional) Enter a voice message response number in the **Voice Msg** field.
5. Enter a code in the **EDI Equiv** field, if required.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Site Code Validation Form (STVSITE)

The Site Code Validation Form (STVSITE) defines codes that identify other locations generally off campus.

Note: This table is also used by the Events Module.

View

The screenshot displays the 'Site Code Validation STVSITE 8.0 (UDCSysT)' window. It contains three rows of data, each representing a site entry. Each entry includes a 'Site Code', a 'Description', 'Street Line 1', 'Street Line 2', 'Street Line 3', 'City', 'State or Province', 'ZIP or Postal Code', 'Nation', 'Activity Date', and 'Other Description'.

Site Code	Description	Street Line 1	Street Line 2	Street Line 3	City	State or Province	ZIP or Postal Code	Nation	Activity Date	Other Description
001	Downtown Site	12 Market Street	C/O John Smith		Philadelphia	PA Pennsylvania	19887		16-FEB-1988	
002	North Wales Site	1399 Rudeyard Way	Suite 123		Malvern	PA Pennsylvania	19355		24-MAR-1998	
ADD	Addison Campus	123 Main Street			Addison	IL Illinois	60660		11-JAN-2008	

Steps

1. Access the Site Code Validation Form (STVSITE).
2. Enter a code for the site in the **Site Code** field.
3. Enter the site name in the **Description** field.
4. Enter the address information associated with the site in the following fields:
Street 1, Street 2, Street 3, City, State or Province, Zip or Postal Code,
and **Nation**.
5. The **Activity Date** field defaults to today's date when saved.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Student Type Code Validation Form (STVSTYP)

Use the Student Type Code Validation Form (STVSTYP) to create, update, insert, and delete student type codes (i.e., Returning Freshman, Continuing, Transfer, etc.). Several forms in various modules use this form to validate the student type codes. You can only create and update these codes from this form.

View

Code	Description	Next Student Type	System Required	Activity Date
0	Undeclared	0	<input checked="" type="checkbox"/>	31-MAY-1994
1	Transfer Student	C	<input type="checkbox"/>	13-MAR-2003
2	Special PT High School Student	H	<input type="checkbox"/>	05-NOV-2003
3	Graduate Student		<input type="checkbox"/>	28-APR-2006
5	Reciprocal Exchange Student		<input type="checkbox"/>	03-NOV-2005
A	Student Studying Abroad		<input type="checkbox"/>	11-MAY-2005
B	International Baccalaureate		<input type="checkbox"/>	16-NOV-2007
C	Continuing	C	<input type="checkbox"/>	06-MAY-1987
D	Dual Degree Student		<input type="checkbox"/>	15-SEP-2007
E	Adult/Continuing Education	E	<input type="checkbox"/>	04-JAN-1995
F	Repeating		<input type="checkbox"/>	17-APR-2005
G	Returning Graduate	C	<input type="checkbox"/>	10-JAN-2008
H	High School Student	H	<input type="checkbox"/>	15-OCT-2002
I	International Student		<input type="checkbox"/>	11-MAY-2005
L	Concordia Language Village	L	<input type="checkbox"/>	29-MAR-2007
M	Mature		<input type="checkbox"/>	18-MAY-1999
N	New First Time	C	<input type="checkbox"/>	04-JAN-1995
P	Professional		<input type="checkbox"/>	15-SEP-2007
R	Returning	C	<input type="checkbox"/>	04-JAN-1995
S	Special	S	<input type="checkbox"/>	06-MAY-1987
T	Transfer	C	<input type="checkbox"/>	16-SEP-2007
U	Erasmus		<input type="checkbox"/>	21-NOV-1998

Steps

1. Access the Student Type Code Validation Form (STVSTYP).
2. Enter a one-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Enter a code in the **Next Student Type** field to identify the student type to be assigned when the Student Type Update Report (SHRTYPE) is run.

Example: The Next Student Type for *A - First Time Freshman* would be *C - Continuing*. The Next Student Type for an *E - Adult Continuing Education* Code would be *E - Adult Continuing Education* since the status for this type of student would not change from year to year.

5. Click the **System Required** checkbox if this validation table record is required.

Examples: First Time Freshman, Continuing.

Note: The **System Required** checkbox is used to set up a default when residency is not entered in the Recruiting module, and the prospect record is pulled to the Admissions module to build the application. If the **System Required** checkbox is checked, the validation table record cannot be deleted.

6. Repeat steps 2-5 until all codes are set up.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Term Code Validation Form (STVTERM)

The Term Code Validation Form (STVTERM) defines codes that identify terms. Term codes must be numeric and in the YYYYTT format. Codes must be constructed so they maintain the appropriate sequence of terms.

Examples: Include 999999 for end of time; include 200201 for Fall 2002.

View

Term	Description	Term Start Date	Term End Date	Term Type	Academic Year	Housing Start Date	Housing End Date	Financial Aid Process Year	Term	Period	System Required	Activity Date
NSTM01	Non Standard Term	01-JUN-2007	31-MAY-2008	1	2008	01-JUN-2007	31-MAY-2008	0708			<input type="checkbox"/>	07-SEP-2007
FALL07	Fall 2007	10-SEP-2007	14-DEC-2007	1	2008	10-SEP-2007	14-DEC-2007	0708			<input type="checkbox"/>	16-OCT-2007
DENT78	Dental School 2007-2008	01-AUG-2007	15-JUN-2008	1	2008	01-JUL-2007	01-JUL-2008	0708			<input type="checkbox"/>	12-SEP-2007
BBAY35	Borrower Based Year 3	01-AUG-2005	31-JUL-2006	1	2006	01-AUG-2005	31-JUL-2006	0506			<input type="checkbox"/>	09-NOV-2005
BBAY32	Borrower Based Year 3	01-AUG-2006	31-JUL-2007	1	2007	01-AUG-2006	31-JUL-2007	0607			<input type="checkbox"/>	09-JUN-2006

Steps

1. Access the Term Code Validation Form (STVTERM).
2. Click the **Insert Record** icon to add a new term.
3. Enter a term code in the **Term** field.

Note: Term codes must be numeric and in the YYYYTT format. Codes 000000 (Beginning of Time) and 999999 (End of Time) codes are required by Banner processing.

4. Enter a description of the term in the **Description** field.
5. Enter the start date of the term in the **Term Start Date** field.
6. Enter the end date of the term in the **Term End Date** field.
7. Enter the type code used in the electronic transmission of transcript information via EDI in the **Term Type** field.

Note: The type defaults from the Academic History Control Form (SHACTRL) and can be overridden.

8. Enter the academic year associated with the term in the **Academic Year** field.
9. Enter the date that housing is to start for the term in the **Housing Start Date** field.
10. Enter the date that housing is to end for the term in the **Housing End Date** field.
11. Enter the aid year with which the term is associated in the **Financial Aid Process Year** field.

Note: Because Financial Aid is processed by aid year, institutional terms must be associated with a value in this field.

12. Enter a term associated with the aid year in the **Term** field.
13. Enter the period associated with the term for the aid year in the **Period** field.
14. Click the **System Required** check box if the code is required for all systems.

Note: If the check box is selected, the code cannot be deleted.

15. The **Activity Date** field defaults to today's date.
16. Click the **Save** icon.
17. Click the **Exit** icon.

Advancement Control Form (AGACTRL)

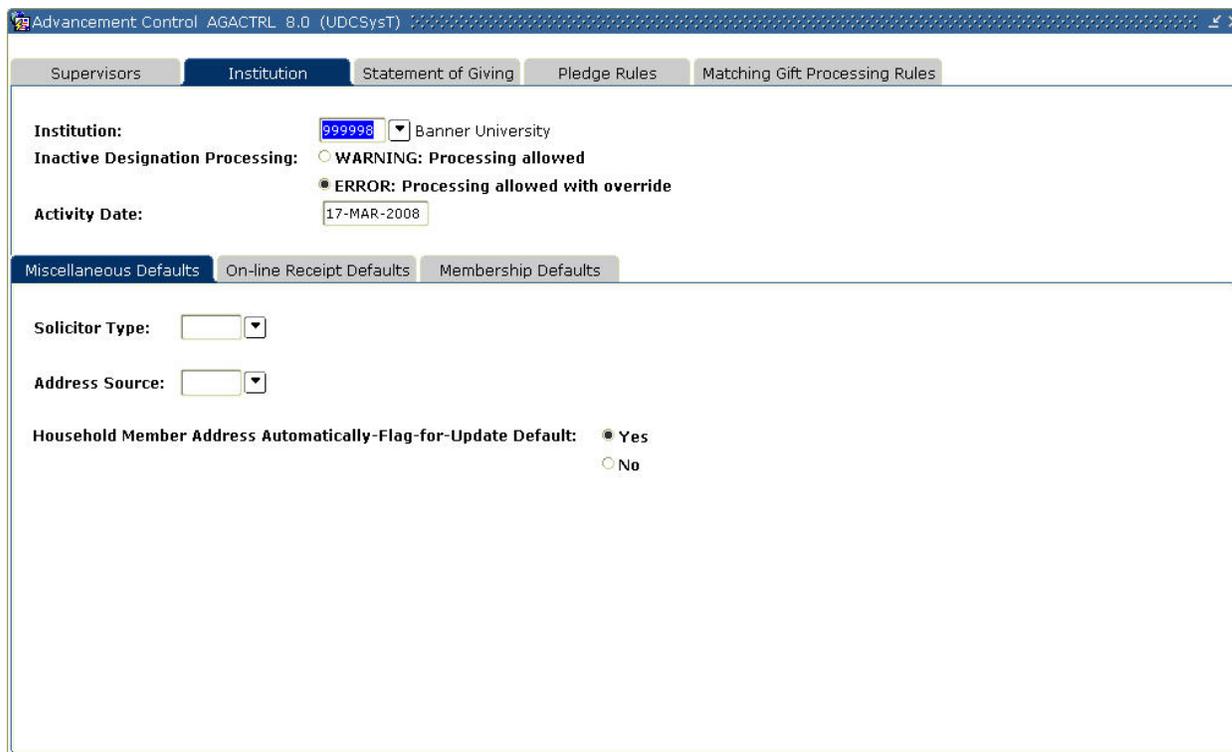
The Advancement Control Form (AGACTRL) lets you enter and store institution-specific values for the following areas: cashiering, prospect management, constituent comments, matching gift processing, online receipts, membership processing, inactive designation processing, pledge feed rules, finance interface, unconditional pledge category, and statement of giving. It is used by Banner Student and stores the default values for online receipting and membership renewal/reminder IDs.

Institution tab

Specifically, the Institution tab stores the code of your institution so that it can be checked against records of Advancement individuals to identify IDs who are your institution's alumni. It is also used in the Banner Student to Advancement Interface (APPSTDI) for degree information. For APPSTDI to run successfully, your institution must be entered on this form.

Note: Your institution must first be entered on the Source/Background Institution Code Validation Form (STVSBGI).

View



Advancement Control AGACTRL 8.0 (UDCSysT)

Supervisors **Institution** Statement of Giving Pledge Rules Matching Gift Processing Rules

Institution: 999998 Banner University

Inactive Designation Processing: WARNING: Processing allowed
 ERROR: Processing allowed with override

Activity Date: 17-MAR-2008

Miscellaneous Defaults On-line Receipt Defaults Membership Defaults

Solicitor Type: []

Address Source: []

Household Member Address Automatically-Flag-for-Update Default: Yes
 No

Steps

1. Access the Advancement Control Form (AGACTRL).
2. Click on the **Institution** tab.
3. Select the appropriate value for your institution in the **Institution** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Day-to-Day Operations



Section goal

The goal of this section is to explain the day-to-day or operational procedures to apply the Student to Advancement Interface process to your institution.

Objectives

In this section you will learn how to

- understand and apply the Student to Advancement Interface process to your respective institution's business practice
- submit the interface process to meet the institution's business practice needs.

Rolling Currently Enrolled Students

The Student to Advancement Interface Process (APPSTDI) is used to roll three categories of student records.

- Graduates
- Non-graduated, not currently enrolled students
- Currently enrolled students

In this lesson, the Student to Advancement Interface Process (APPSTDI) is used to roll **currently enrolled students**. The process selects **students who have not completed their degree (undergraduate or graduate level) but are currently enrolled**.

Note: This is determined by a flag in Banner Student that indicates enrollment status. Make sure the Registrar's Office has set flags for the term you want.

View

The screenshot shows a web application window titled "Process Submission Controls GJAPCTL 8.0 (UDCSysT)". The interface includes several sections:

- Process:** A dropdown menu set to "APPSTDI" and a text field containing "Student-Advancement Interface".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. The "Values" column has a dropdown menu. The table lists parameters 01 through 08, with 08 selected. Below the table, it specifies "LENGTH: 3 TYPE: Character O/R: Optional M/S: Multiple" and "Campus of degree to consider for the interface (STVCAMP)".
- Submission:** A section with a "Save Parameter Set as" checkbox, "Name:" and "Description:" text fields, and "Hold" and "Submit" radio buttons.

Steps

1. Access the Student to Advancement Interface Process (APPSTDI) via the Process Submissions Controls Form (GJAPCTL).

IF	THEN
you want the output to appear on the screen	enter <i>Database</i> in the Printer field.
you want the output printed out	select the printer.

Note: In the **Special Print** field, enter any special instruction; if left empty the default format is landscape. In the **Lines** field, enter the number of lines to print; the default is 55. In the **Submit Time** field, enter the time you want the process to run (format = 00:00-24:00); if left empty the process runs immediately.

2. Perform a **Next Block** function until you access the Parameter Values block.
3. To roll currently enrolled students, enter the following parameters. (Click the **Values** icon to view the List of Values.)

Parameter	Value
01 Address Priority and Type	Preferred address type and priority Example: 1MA, 2PR NOTE: ALUMPRAD rule on GTVSDAX may also need to be updated.
02 Level of Student	(optional) Level of student to consider for the interface Example: Freshman Click Values to see options
03 Student Type	(optional) Type of student to consider for the interface Example: Undeclared, Transfer, New First Time Click Values to see options

04 Student College	(optional) College of student to consider for the interface Example: College of Arts and Sciences Click Values to see options
05 Student Campus	(optional) Campus of student to consider for the interface Example: Main Click Values to see options
06 Student Site	(optional) Site of student to consider for the interface Example: Downtown Click Values to see options.
15 Donor Code for Non-Degree, Students	Donor code to assign to current students identified in the interface Example: STDN Click Values to see options.
16 Minimum Credit for Current Students	Minimum number of credits to be considered a current student Example: 12
17 Current Term – Students/Non Grad	Term that is used to identify current students Example: Fall 2007
18 Academic History Terms to Include	Terms to include in determining which students are considered Example: Fall 2007 & Spring 2008 or enter wildcard for all terms
19 Create Empl. History	Whether employment history data should be included/updated (Yes or No) See parameter 27 to determine if this information should be reviewed.
20 Create Activities	Whether activity information should be included/updated (Yes or No)

21 Report or Update	View report only or view report AND update database.
22 Use Year of Grad Date	Code that indicates if the graduation date year or the graduation year is used for the preferred class year.
23 Update College/Class Year	Code that indicates if existing APACONS preferred college and class year should be updated (Y or N).
24 Alternate College Value for 00	College code that is loaded for a new or updated record if incoming code is 00. Click values to see options.
25 Include Deceased Students	Code that indicates if records flagged as deceased should be included (Y or N).
26 Status of Student Records to Exclude	<i>Current</i> student status codes to exclude from selection process.
27 Review Employment Records	Code that indicates whether employment records are loaded to APAERVM (Y or N). Used in conjunction with Parameter 19.
28 Insert Address Name Details	Code to indicate how address name details on APANAME are to be loaded if field is null (F, I, or N).
29 Salutation Code for Salu Value	Salutation type code that is used to load salutation record on APAMAIL. Click values to see options.
30 Sort Report	Value to indicate how or if to sort (A is alphabetic, B by ID, C by college and degree, or N no sort defined). N is the default
31 Student Degree	<i>Current</i> student degree codes to use in selection criteria.
33 Student Major	<i>Current</i> students major, minor, concentration codes to use in selection criteria.

<p>35 Include Punctuation for Insert Name Record</p>	<p>Code that indicates whether appropriate punctuation is inserted for Address Name and Salutation Name records (Y or N). Used in conjunction with ALUMPUNC rule on GTVSDAX</p>
---	---

4. Perform a **Next Block** function to access the Submission block.
5. Check the **Save Parameters** checkbox if you would like to save this set of parameters for future use.
6. In the **Name** field, enter a short name for your parameter set.
7. In the **Description** field enter a long description for your parameter set.

Example: Current students from Main campus.

IF	THEN
you would like to run this process immediately	select the Submit radio button.
you would like to run this process at a later time	select the Hold radio button.

8. If you have saved your parameters, you receive the message box 'Saving current parameters values as (name of your parameter);' click **OK**.

Note: It is recommended that you run your process in report mode first, then review your results via GJAPCTL, and briefly verify that the results are what you are expecting. If the results are accurate, then rerun the process in update mode.

Rolling Non-graduates, not currently enrolled

The Student to Advancement Interface Process (APPSTDI) is used to identify three categories of student records.

- Graduates
- Non-graduated, not currently enrolled students
- Non-graduated current students

In this lesson, the Student to Advancement Interface Process (APPSTDI) is used to roll **non-graduated students, not currently enrolled**.

View

The screenshot shows a web-based interface for the APPSTDI process. At the top, the process is identified as 'APPSTDI' and 'Student-Advancement Interface'. Below this is a 'Printer Control' section with fields for 'Printer', 'Special Print', 'Lines' (set to 55), and 'Submit Time'. The main section is 'Parameter Values', which contains a table with two columns: 'Number' and 'Parameters'. The table lists parameters 01 through 08, with 08 'Degree Campus' selected. Below the table, there is a 'Values' column with empty input fields. A note specifies 'LENGTH: 3 TYPE: Character O/R: Optional M/S: Multiple Campus of degree to consider for the interface (STVCAMP)'. At the bottom is a 'Submission' section with a 'Save Parameter Set as' checkbox, 'Name' and 'Description' fields, and 'Hold' and 'Submit' radio buttons.

Number	Parameters	Values
01	Address Priority and Type	
02	Level of Student	
03	Student Type	
04	Student College	
05	Student Campus	
06	Student Site	
07	Degree College	
08	Degree Campus	

LENGTH: 3 TYPE: Character O/R: Optional M/S: Multiple
Campus of degree to consider for the interface (STVCAMP).

Steps

1. Access the Student to Advancement Interface Process (APPSTDI) via the Process Submissions Controls Form (GJAPCTL).

IF	THEN
you want the output to appear on the screen	enter <i>Database</i> in the Printer field.
you want the output printed out	select the printer.

Note: In the **Special Print** field, enter any special instruction; if left empty the default format is landscape. In the **Lines** field, enter the number of lines to print; the default is 55. In the **Submit Time** field, enter the time you want the process to run (format = 00:00-24:00); if left empty the process runs immediately.

2. Perform a **Next Block** function until you access the Parameter Values block.
3. To roll non-current students, enter the following parameters. (Click the **Values** icon to view the List of Values.)

Parameter	Value
01 Address Priority and Type	Preferred address type and priority. Example: 1MA, 2PR Note: ALUMPRAD rule on GTVSDAX may also need to be updated.
02 Level of Student	(optional) Level of student to consider for the interface Example: Freshman Click values to see options.
03 Student Type	(optional) Type of student to consider for the interface Examples: Undeclared, Transfer, New First Time Click values to see options.
04 Student College	(optional) College of student to consider for the interface. Example: College of Arts and Sciences Click values to see options.

05 Student Campus	(optional) Campus of student to consider for the interface. Example: Main Click values to see options.
06 Student Site	(optional) Site of student to consider for the interface. Example: Downtown Click values to see options.
12. Donor Code for Non-Degree, Non-Students	Donor code for constituents who have not been awarded a degree at the institution, have earned a minimum number of credits, but have not attended the institution since a particular term. Example: ALND
13 Minimum Credit for Non-Degree, Non-Students	Minimum number of credits for non-degree-awarded, non-current students. Example: 12
14 Last Active Term for Non-Students	Term code for the latest term since the non-degree-awarded students have not been active; the student cannot have an effective term record for any term after (not including) this term. Click values to see options
18 Academic History Terms to Include	What terms to include in determining which students are considered or wildcard. Example: Fall 2007 & Spring 2008
19 Create Empl. History	Whether employment history data should be included/updated (Yes or No). See parameter 27 to determine if this information should be reviewed.
20 Create Activities	Whether activity information should be included/updated (Yes or No).
21 Report or Update	View report only or view report AND update database.
22 Use Year of Grad Date	Code that indicates if the graduation date year or the graduation year is used for the preferred class year.

23 Update College/Class Year	Code that indicates if existing APACONS preferred college and class year should be updated (Y or N).
24 Alternate College Value for 00	College code that is loaded for a new or updated record if incoming code is 00.
25 Include Deceased Students	Code that indicates if records flagged as deceased should be included (Y or N).
27 Review Employment Records	Code that indicates whether employment records are loaded to APAERVM (Y or N). Used in conjunction with parameter 19.
28 Insert Address Name Details	Code to indicate how address name details on APANAME are to be loaded if field is null (F, I, or N).
29 Salutation Code for Salu Value	Salutation type code that is used to load salutation record on APAMAIL.
30 Sort Report	Value to indicate how or if to sort (A alphabetical, B by id, C college and degree, or N no sort defined). N is the default
35 Include Punctuation for Insert Name Record	Code that indicates whether appropriate punctuation is inserted for Address Name and Salutation Name records (Y or N). Used in conjunction with ALUMPUNC rule on GTVSDAX

4. Perform a **Next Block** function to access the Submission block.
5. Check the **Save Parameters** checkbox if you would like to save this set of parameters for future user.
6. In the **Name** field, enter a short name for your parameter set.
Example: NE

7. In the **Description** field enter a long description for your parameter set.
Example: Not currently enrolled at main campus

IF	THEN
you would like to run this process immediately	select the Submit radio button.
you would like to run this process at a later time	select the Hold radio button.

8. If you have saved your parameters, you receive the message box 'Saving current parameters values as (name of your parameter);' click **OK**.

Note: It is recommended that you run your process in report mode, then review your results via GJAPCTL to see if they are what you are expecting. If the results are accurate, then rerun the process in update mode.

Rolling Graduated Students

The Student to Advancement Interface Process (APPSTDI) is used to identify three categories of student records.

- Graduates
- Non-graduated, not currently enrolled
- Currently enrolled t students

In this lesson, the Student to Advancement Interface Process (APPSTDI) is used roll **graduated students**. The process selects **students who have completed their degrees**.

View

The screenshot shows a web browser window titled "Process Submission Controls GJAPCTL 8.0 (UDCSysT)". The interface includes the following sections:

- Process:** A dropdown menu set to "APPSTDI" and a text field containing "Student-Advancement Interface".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. The "Values" column has a dropdown menu. The table lists parameters 01 through 08, with 08 selected. Below the table, it states: "LENGTH: 3 TYPE: Character O/R: Optional M/S: Multiple Campus of degree to consider for the interface (STVCAMP)." A vertical scrollbar is on the right side of the table.
- Submission:** A section with a checkbox for "Save Parameter Set as", a "Name:" text field, a "Description:" text field, a radio button for "Hold", and a radio button for "Submit".

Steps

1. Access the Student to Advancement Interface Process (APPSTDI) via the Process Submissions Controls Form (GJAPCTL).

IF	THEN
you want the output to appear on the screen	enter <i>Database</i> in the Printer field.
you want the output printed out	select the printer.

Note: In the **Special Print** field, enter any special instruction; if left empty the default format is landscape. In the **Lines** field, enter the number of lines to print; the default is 55. In the **Submit Time** field, enter the time you want the process to run (format = 00:00-24:00); if left empty the process runs immediately.

2. Perform a **Next Block** function until you access the Parameter Values block.
3. To roll graduated students, enter the following parameters. (Click the **Values** icon to view the List of Values.)

Parameter	Value
01 Address Priority and Type	Preferred address type and priority. Example: 1MA, 2PR Note: ALUMPRAD rule on GTVSDAX may also need to be updated.
02 Level of Student	(optional) Level of student to consider for the interface. Example: Graduate. Click values to see options.
07 Degree College	(optional) College of degree. Example: AS; College of Arts and Sciences. Click values to see options
08 Degree Campus	(optional) Campus of degree. Example: M; Main. Click values to see options

09 Date Range Start for Degree	Starting date range for degree to consider for the interface (DD-MON-YYYY) This would be the start of the quarter or semester.
10 Date Range End for Degree	Ending date range to consider for the interface (DD-MON-YYYY). This would be the end of the quarter or semester.
11 Donor Code for Degreed Students	Donor code for alumni who have been awarded degrees at the institution. Example: ALUM
18 Academic History Terms to Include	What terms to include in determining which students are considered. Example: Use wildcard.
19 Create Empl. History	Whether employment history data should be included/updated (Yes or No). Used in conjunction with Parameter 27.
20 Create Activities	Whether activity information should be included/updated (Yes or No).
21 Report or Update	View report only or view report and update database.
22 Use Year of Grad Date	Code that indicates if the graduation date year or the graduation year is used for the preferred class year.
23 Update College/Class Year	Code that indicates if existing APACONS preferred college and class year should be updated (Y or N).
24 Alternate College Value for 00	College code that is loaded for a new or updated record if incoming code is 00.
25 Include Deceased Students	Code that indicates if records flagged as deceased should be included (Y or N).

27 Review Employment Records	Code that indicates whether employment records are loaded to APAERVM (Y or N). Used in conjunction with parameter 19.
28 Insert Address Name Details	Code to indicate how address name details on APANAME are to be loaded if field is null (F, I, or N).
29 Salutation Code for Salu Value	Salutation type code that is used to load salutation record on APAMAIL.
30 Sort Report	Value to indicate how or if to sort (A for academic, B by id, C by college and degree, or N no sort defined. N is the default.
32 Awarded Degree	<i>Graduates</i> degree codes to use in selection criteria. Click values to see options
34 Degree Major	<i>Graduates</i> major, minor, concentration codes to use in selection criteria. Click values to see options
35 Include Punctuation for Insert Name Record	Code that indicates whether appropriate punctuation is inserted for Address Name and Salutation Name records (Y or N). Used in conjunction with ALUMPUNC rule on GTVSDAX.

4. Perform a **Next Block** function to access the Submission block.
5. Check the **Save Parameters** checkbox if you would like to save this set of parameters for future user.
6. In the **Name** field, enter a short name for your parameter set. Example: GR.

7. In the **Description** field enter a long description for your parameter set.
Example: Graduates Spring 2008

IF	THEN
you would like to run this process immediately	select the Submit radio button.
you would like to run this process at a later time	select the Hold radio button.

8. If you have saved your parameters, you receive the message box 'Saving current parameters values as (name of your parameter);' click **OK**.

Note: It is recommended that you run your process in report mode first, then review your results via GJAPCTL, verifying that the results are what you are expecting. If the results are accurate, then rerun the process in update mode.

Self Check

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

The two critical pieces of information needed for performing the interface are Name Type and Address Type.

True or False

Question 2

The grade roll process must be done to create Academic History records for students.

True or False

Question 3

List the three student categories.

Question 4

The Student to Advancement Interface Process (APPSTDI) is the process used to roll student information.

True or False.

Answer Key

Question 1

The two critical pieces of information needed for performing the interface are Name Type and Address Type.

False (Address Type and Alumnus Category Code)

Question 2

The grade roll process must be done to create Academic History records for students.

True

Question 3

List the three student categories.

Graduates

Non graduates, not currently enrolled students

Currently enrolled students

Question 4

The Student to Advancement Interface Process (APPSTDI) is the process used to roll student information.

True

Appendix



Forms Job Aid

Form	Full Name	Use this Form to...
APPSTDI	Student to Advancement Interface	add records to Banner Advancement from Banner Student that define individuals as constituents and also updates information on existing constituents and select individuals who meet criteria based on the values entered for the parameters.
STVATYP	Address Type Code Validation Form	define address types and descriptions, and their default telephone type(s).
STVCAMP	Campus Code Validation Form	define codes that identify the campuses within your institution.
ATVDONR	Donor Category Code Validation Form	define donor category codes for advancement individuals and advancement organizations.
STVLEVL	Level Code Validation Form	enter the level code.
STVSITE	Site Code Validation Form	define codes that identify states and provinces.
STVSTYP	Student Type Code Validation Form	create, update, insert, and delete student type codes (i.e., Returning Freshman, Continuing, Transfer, etc.).
STVTERM	Term Code Validation Form	define codes that identify terms.
AGACTRL	Advancement Control Form	enter and store institution-specific values for the following areas: cashiering, prospect management, constituent comments, matching gift processing, online receipts, membership processing, inactive designation processing, pledge feed rules, finance interface, unconditional pledge category, and statement of giving.