# Banner Student Self-Service Admissions Training Workbook

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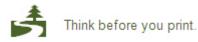
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**Revision History Log** 

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April 2008	New version that supports 8.0 software.
July 2008	Update formatting and forms job aid.
September 2008	Correct steps in SAAERUL definition p. 67 to remove the TEST group.

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# Introduction



#### **Course goal**

The goal of this workbook is to provide you with the knowledge and practice to setup Admissions Self-Service and process Web admissions applications. The workbook is divided into these sections:

- Introduction
- Set Up
- Day-to-Day Operations
- Reference

#### **Course objectives**

In this course you will learn how to

- set up all controls to create a web application
- create user defined questions
- create verification steps for web applications submitted
- review submitted electronic applications
- reconcile suspended applications
- run verification steps for electronic applications
- override verification steps not satisfied
- "PUSH" verified applications into permanent Banner tables.

#### Intended audience

Admissions Office Applicant Processing Staff and members of the IT department

#### **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
- administrative rights to create and perform the necessary set up in Banner
- know the basics of the Banner Student System Admissions module
- review General Web controls
- set up the global Web rules using the Customize Web Rules in WebTailor
- set up the title, header, back URL and link, and help URL and link fields using **Customize a Web Menu or Procedure** in WebTailor.

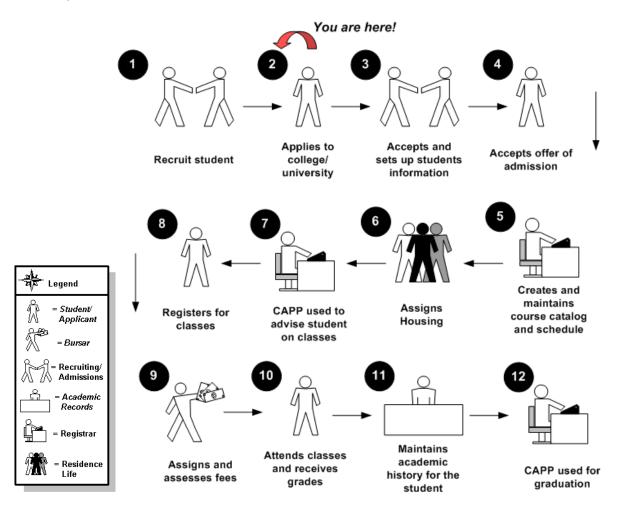
## **Process Introduction**

#### About the process

The Admissions Self-Service product includes Banner set up enabling applicants to submit an application on the web as well as review the status of applications already submitted.

#### **Flow diagram**

This diagram highlights where the Self-Service Admissions process occurs within the overall Student process.



#### About the process

- Rules, control forms and validation forms that control web processing are set up on the Banner system. Unless a new code is required, these steps are only performed once.
- Values that will be displayed on the web are web-enabled on the Banner system.
- Web pages are customized using WebTailor.
- Quick Start Processing rules are defined.



#### **Section Goal**

Set Up

The goal of this section is to outline the set-up process and detail the procedures to set-up your Banner system to enable applicants to submit information to your institution.

#### **Objectives**

In this section you will learn how to

- set up all controls to create a web application
- create user defined questions
- create verification steps for web applications submitted.

# Validation and Rules That Control Admissions Self-Service

#### Introduction

Before the Admissions Self-Service product can be used, there are several forms and rules that need to be set or created.

#### **Rule forms needed**

These forms are used to set the rules and parameters in Banner for handling Self-Service Admissions. Directions on how to set the parameters start on the next page.

Form Description	Banner Name
Application Type Code Validation	STVWAPP
Electronic Application Section Code Validation	STVWSCT
Existing or Incoming Student Data Mapping	SOAEQUI
Web Application Elements	STVWSCF
Admission Request Checklist Code Validation	STVADMR
Admissions Application Status Code Validation	STVAPST
Admissions Application Decision Code Validation	STVAPDC
Web User Defined Questions	SAAWUDQ
Web Application Section Rules	SAAWAPP
Electronic Applicant Web Calendar Rules	SAAWATR
Web Application Term Display Control	SOAATRM
Admissions Web Calendar Rules	SAAWAAD
Web Application Customized List	SAAWADP
Letter Code Validation	GTVLETR

Form Description	Banner Name
HTML Letter Rules	SOAELTL
Format HTML Letter Rules	SOAELTR
Electronic Web Applicant Default Rules	SAAWADF
Electronic Admissions Application Rules	SAAERUL
Electronic Admissions Procedure/Routine Control	SAAECRL
EDI Cross Reference Rules	SOAXREF
EDI Cross Reference Curriculum Rules	SOAXCUR
Web Application Customized Curriculum	SAAWCUR

## Application Type Code Validation

#### Purpose

The Application Type Code Validation Form (STVWAPP) is used to identify application codes and define the level, student type, and admission types associated with the code. You can also choose which codes to display on the Self-Service website and indicate which codes is system required.

Code	Description	Level T	Student Type T	Admission Type 💌	Web Indicator	System Required	Activity Date
00	Default Example-All Sections	UG	N	ST			19-MAR-1996
A1	Bachelor Degree Programs	UG	N	ST			15-OCT-2007
A2	Base Programs Quick App	CR	N	ST			31-JUL-2007
A3	Open Learning Enrollment	UG	D	QK			31-AUG-2006
AA	Associate Degree Programs	CR	N	ST			30-AUG-2006
AR	GoArmy Common Application	UG	N	ST			04-MAY-2006
B1	Application - AS Programs	UG	N	ST			19-JUN-2006
32	CC Application (PBJ)	UG	N	ST			08-OCT-2004
ва	Bachelor Programs	UG	N	ST			19-JUN-2006
C1	Apply and Register	CR	N	ST			31-AUG-2006
C2	Quick Start (JJ)	CR	N	ST			31-AUG-2006
CA	Credit Student Application	CR	N	ST			25-NOV-2005
cc	Concordia College	UG	N	ST			06-APR-2007
CL	Concordia Language Village	NC	L	QK			06-APR-2007
СМ	First Time Student (CM)	UG	N	ST			05-NOV-2004
со	Colorado Application	UG	N	ST			05-FEB-2007
D1	Master-Occupational Therapy	GR	N	ST			28-MAR-2005
E1	Application - BS Programs	UG	N	ST			05-MAY-2005
ES	BSc Environmental Science	UG	N	ST			16-NOV-2007
FA	Foreign Study Programs	GR	R	ST			27-AUG-2004
FU	CBASE Programs	UG	N	ST			19-JUN-2006

Follow these steps to create an application type code.

- 1. Access the Application Type Code Validation Form (STVWAPP).
- 2. Enter a code in the **Code** field.
- 3. Enter a description in the **Description** field.
- 4. Select a level in the **Level** field.
- 5. Select a student type code in the **Student Type** field.
- 6. Select an admission type code in the **Admission Type** field.
- 7. Click the Web Indicator checkbox.

Note: The **System Required** checkbox specifies whether a value is required by the system. If this checkbox is checked, the validation table record cannot be deleted. Once this checkbox is checked, it cannot be unchecked. You will not select this checkbox for values you create.

- 8. Click the **Save** icon.
- 9. Click the **Exit** icon.

# **Electronic Application Section Code Validation**

#### **Purpose**

The Electronic Application Section Code Validation Form (STVWSCT) is used to define the procedure for each section code.

a Web Application Section Validation STVW	/SCT 8.0 (UDCSysT) XX				
Section Cod	e Description	Sys Req		Image	
ACTIVITIES	Activities		StuWebI	nfoball	
Procedure:	bwskaact.P_DispAppActivit	ties		Activity Date:	22-APR-1996
ADDITION2	More Additional Informatio	n 🔽	StuWebI	nfoball	
Procedure:	bwskaudf.P_DispAppUserD	)ef		Activity Date:	06-NOV-2003
ADDITION3	More Additional Informatio	n 🔽	StuWebI	nfoball	
Procedure:	bwskaudf.P_DispAppUserE	)ef		Activity Date:	06-NOV-2003
ADDITION4	More Additional Informatio	n 🔽	StuWebI	nfoball	
Procedure:	bwskaudf.P_DispAppUserD	)ef		Activity Date:	06-NOV-2003
ADDITION5	More Additional Informatio	n 🔽	StuWebI	nfoball	
Procedure:	bwskaudf.P_DispAppUserD	)ef		Activity Date:	06-NOV-2003
ADDITION6	More Additional Informatio	n 🔽	StuWebI	nfoball	
Procedure:	bwskaudf.P_DispAppUserD	)ef		Activity Date:	06-NOV-2003

Follow these steps to define the procedure for each section code.

- 1. Access the Electronic Application Section Code Validation Form (STVWSCT).
- 2. Review the codes listed.
- 3. Perform an **Insert Record** function if additional codes are needed.
- 4. Enter a section code in the **Section Code** field.
- 5. Enter a description of the section code in the **Description** field.

Note: The **Sys Req** checkbox specifies whether a value is required by the system. If this checkbox is checked, the validation table record cannot be deleted. Once this checkbox is checked, it cannot be unchecked. You will not select this checkbox for values you create.

- 6. Enter *StuWebInfoball* in the **Image** field.
- 7. Enter the procedure code in the **Procedure** field.
- 8. Click the **Save** icon.
- 9. Click the **Exit** icon.

### **Existing or Incoming Student Data Mapping**

#### **Purpose**

The Existing or Incoming Student Data Mapping Form (SOAEQUI) is used to compare web application data with the existing student data in the system. If there is a match, the rule with the highest priority number (1=highest) is used. In this way, you can set up rules that review that student's status, academic status, and registration status by College, Degree, Program, and Major.

Example: A former student in the nursing program who left the school in good academic standing would be eligible to register while you could set another rule that would make a former student who left the nursing program because of academic suspension ineligible to register for the nursing program.

Existing or Incoming Student Data Mapping SOAEQUI 8.0 (UDCSysT) 3000000000000000000000000000000000000	
Existing:       Term:       V       Level:       V       Degree:       V       Program:       V       Major:       V         Incoming:       Term:       V       Level:       V       College:       V       Degree:       V       Program:       V       Major:       V	
Existing Student Data Priority Term Level College Degree Program Major Status Status Status I I I I I I I I I I I I I I I I I I I	
Incoming Data          Term       Level       College       Degree       Program       Major       End Term:       Letter Code: <td <t<="" td=""></td>	
Existing Student Data Priority Term Level College Degree Program Major Status Status Status Tend Term:	
Incoming Data          Term       Level       College       Degree       Program       Major       End Term:       Letter Code:         V       <	

Follow these steps to set up the comparison of web application data with existing student data.

- 1. Access the Existing or Incoming Student Data Mapping Form (SOAEQUI).
- 2. Select a term in the **Existing Term** field.
- 3. Select a level code in the **Existing Level** field.
- 4. Select a college code in the **Existing College** field.
- 5. Select a degree code in the **Existing Degree** field.
- 6. Select a program code in the **Existing Program** field.
- 7. Select a major code in the **Existing Major** field.
- 8. Select a term in the **Incoming Term** field.
- 9. Select a level code in the **Incoming Level** field.
- 10. Select a college code in the **Incoming College** field.
- 11. Select a degree code in the **Incoming Degree** field.
- 12. Select a program code in the **Incoming Program** field.
- 13. Select a major code in the Incoming Major field.
- 14. Perform a **Next Block** function.
- 15. Enter a number in the **Priority** field.
- 16. Select a status code in the **Student Status** field.
- 17. Select an academic status code in the Academic Status field.
- 18. Select a registration status code in the **Registration Status** field.
- 19. Enter a term in the **End Term** field for Existing Student data.
- 20. Enter a term in the **End Term** field for Incoming Student data.
- 21. Select a letter code in the Letter Code field.
- 22. Click the Save icon.
- 23. Click the Exit icon.

#### **Purpose**

The Web Application Elements (STVWSCF) is used to link an element code to a web section code.

Example: The Web Section code ADDR2 contains the following elements: ADDR2\_City, ADDR2\_County, ADDR2\_Nation, ADDR2\_Phone\_Number, ADDR2\_Street1, ADDR2\_Street2, ADDR2\_Street3, and ADDR2\_Zip.

Element Code	Description	System Required	Web Section	Activity Date
ACTIVITY	Activity		ACTIVITIES	14-MAY-2008
ADDR2_CITY	City		ADDR2	22-FEB-2001
ADDR2_COUNTY	County		ADDR2	22-FEB-2001
ADDR2_INTL_ACCESS	International Access		ADDR2	22-FEB-2001
ADDR2_NATION	Country		ADDR2	22-FEB-2001
ADDR2_PHONE_NUMBER	Phone Number		ADDR2	22-FEB-2001
ADDR2_STATE	State/Province		ADDR2	22-FEB-2001
ADDR2_STREET1	Street Line 1		ADDR2	22-FEB-2001
ADDR2_STREET2	Street Line 2		ADDR2	22-FEB-2001
ADDR2_STREET3	Street Line 3		ADDR2	22-FEB-2001
ADDR2_ZIP	Zip Code		ADDR2	22-FEB-2001
ATYP	Address Type		ADDR1	22-FEB-2001
BIRTHDATE	Birth Date		PERSONAL	22-FEB-2001
CITIZEN	Citizenship		PERSONAL	22-FEB-2001
CITY	City		ADDR1	22-FEB-2001
CONCENTRATION	Concentration		PLAN	29-DEC-2005
CONFIDENT	Confidentiality		PERSONAL	22-FEB-2001
COUNTY	County		ADDR1	22-FEB-2001
EMAIL	Email		PERSONAL	22-FEB-2001
ETHNIC	Ethnicity		PERSONAL	22-FEB-2001
ETHNIC_CATEGORY	Ethnic Category		PERSONAL	26-JAN-2006
FIRST_NAME	First Name		NAME	22-FEB-2001

Follow these steps to define the web application elements.

- 1. Access the Web Application Elements (STVWSCF).
- 2. Enter an element code in the **Element Code** field.
- 3. Enter a description of the code in the **Description** field.

Note: The **System Required** checkbox specifies whether a value is required by the system. If this checkbox is checked, the validation table record cannot be deleted. Once this checkbox is checked, it cannot be unchecked. You will not select this checkbox for values you create.

- 4. Select a web section in the **Web Section** field.
- 5. Click the **Save** icon.
- 6. Click the **Exit** icon.

#### Introduction

Several admissions-related validation forms include **Web Display Indicator** checkboxes. These indicators control whether a specific value in the validation form will display or be available for selection via the Web. Scripts that added the **Web Indicator** fields set the **Web Indicator** checkbox to unchecked (set to *N*) for all values on these forms. It must be checked (set to *Y*) for a value to be available on the Web. When you Web enable a value in one of these validation forms, you should also review the description. The description of a value, not the code itself, displays on the Web.

#### Validation forms

The following validation forms include **Web Display Indicator** checkboxes that control admissions application processing via the Web.

- Admission Request Checklist Code Validation Form (STVADMR)
- Admission Application Status Code Validation Form (STVAPST)
- Admission Application Decision Code Validation Form (STVAPDC)

#### **Banner form**

Admission Request Checklist Code Validation Form (STVADMR). An applicant's outstanding checklist items display in the Review Application Status section of the Web when the checklist item is Web enabled.

equest Code	Description	Cross Reference Table Name	Web Indicator	Voice Response Eligibility Indicator	Voice Response Message Number	Activity Date
<mark>540</mark>	AB-540 Form					10-0CT-2007
A100	\$100 Application Fee					12-NOV-2007
ACT	ACT Test Scores	STVTESC				23-AUG-1999
ADM1	Admissions Referral Form					22-SEP-1999
AFEE	\$50 Application Fee					13-NOV-2006
AGEP	Proof of Age					23-AUG-1999
AGS	Academic Good Standing Req.					01-NOV-2006
ALEV	A Level Results	STVTESC				05-APR-2005
AP15	\$15 Application Fee					01-NOV-2005
AP25	\$25 Application Fee					22-MAY-2007
4P50	\$50 Application Fee					20-OCT-2005
4P80	\$80 Application Fee					29-NOV-2005
APFE	\$75 Medical School Fee					21-JUN-2006
APTT	Aptitude Test					25-JUN-2006
ARTP	Art Portfolio					23-AUG-1999
ARTS	AARTS Transcript	STVSBGI				13-JAN-2008
AS	Assessment	STVTESC				03-DEC-2002
ASSE	Assessment Test	STVTESC				15-MAR-2005
ASVA	ASVAB Scores	STVTESC				13-JAN-2008
BANK	Bank Statement					12-0CT-2007
BR	Biology Requirement					01-NOV-2006
BRTH	Sighting of Birth Certificate					23-AUG-1999
BXS2	BDMS Test Reg 2		<ul> <li>Image: A start of the start of</li></ul>			24-MAR-2008

#### **Steps**

Follow these steps to set up the applicant's outstanding checklist items for display.

- 1. Access the Admission Request Checklist Code Validation Form (STVADMR).
- 2. Verify that the **Web Indicator** checkbox is checked for all desired application requirements.
- 3. Click the **Save** icon.
- 4. Click the Exit icon.

#### **Banner form**

Admission Application Status Code Validation Form (STVAPST). Indicated values display when an applicant reviews his or her applications via the Web. If the status of an existing application has not been Web-enabled, the description—Not Available—is displayed.

sion Application Status Code	Validation STVAPST 8.0 (UDCSysT) 🤅	00000000	********		000000000000
Code	Description	VR Msg	System Required	Web Ind	Activity Date
<u>A</u>	Audited but Incomplete				21-OCT-2005
С	Complete ready for review				23-AUG-2002
D	Decision Made				23-AUG-2002
G	Referred to Greensburg Campus				07-FEB-2003
I	Incomplete items outstanding		<ul> <li>Image: A start of the start of</li></ul>		09-JAN-2008
м	Decision Made No Committment				06-SEP-2006
N	Not Processed				05-0CT-2005
R	Under Review Course Deficient				21-0CT-2005
U	Under reviewMath Deficient				05-0CT-2005
W	Withdrawn				03-JAN-1995
$\Box$					

#### **Steps**

Follow these steps to create and maintain application status codes for web display.

- 1. Access the Admission Application Status Code Validation Form (STVAPST).
- 2. Verify that the **Web Indicator** checkbox is checked for all application statuses desired.
- 3. Click the Save icon.
- 4. Click the Exit icon.

#### **Banner form**

2**4** 

Admission Application Decision Code Validation Form (STVAPDC). If an application is entered into Banner (either manually or via the Web), the calendar on SAAWAAD is set up, and the **Web Ind**(icator) check box is checked on STVAPDC and then the most recent decision for that application displays on the Web Application Summary Page. If the decision code has not been Web enabled, then the description—Please Contact Admissions Office—is displayed.

ecisi Code		Significant Decision	Institution Acceptance	Applicant Acceptance	Inactive Application	Institution Rejection	Display On Web	Voice Response Eligible	Voice Response Message	
01	Pending College Review									17-DEC-2002
	Curriculum Status:									
02	Department Approval									14-SEP-2006
	Curriculum Status:									
03	Final Review									24-JUN-1991
	Curriculum Status:	<b></b>								
04	Application Rejected									13-MAY-1999
	Curriculum Status:									
10	Applicant Accepted butnot paid									05-MAR-2001
	Curriculum Status:									
25	Institution Acceptance									28-AUG-2002
	Curriculum Status:	•								
30	Quick Entry									08-JUL-1998
	Curriculum Status:									
31	Quick Entry/Non-Matriculated									13-MAR-1991
	Curriculum Status:	•								
35	Cleared to Attend								0	11-JAN-2007
	Curriculum Status:	•								
40	Applicant Rejected Offer									07-AUG-1987

#### **Steps**

Follow these steps to web-enable the application decisions code(s).

- 1. Access the Admission Application Decision Code Validation Form (STVAPDC).
- 2. Verify that the **Web Indicator** check box is checked for all decision codes desired.
- 3. Click the **Save** icon.
- 4. Click the **Exit** icon.

#### Introduction

The Web User Defined Questions Form (SAAWUDQ) is used to define institution-specific questions that request information not found elsewhere in any application section. You can use the form to develop questions to collect any additional kind of information your processing requires. The user can specify that an ADMR checklist code be associated with a Question/Answer. In addition, they can indicate that a question should have a Yes/No radio button as the answer option on the Web.

Up to ten user-defined questions can be displayed on any application section, and up to twenty user-defined questions can be displayed in the Additional Information section. In addition, the user can also display up to ten essay questions in the essay section (v. 5.4). Each question can be up to 2000 characters in length. The applicant has 2000 characters to answer each non-essay question and up to 32,700 characters to answer each essay question.

pplication Type 🔽	Ordering Sequence		Yes/No Question	EDI Question Code	Admission Request Code	Activity Date
A1		If there were only one opening for for admission to our school, why should we select you?				13-MAY-2004
A1		Have any other family members				24-APR-2002
A1		If yes, please list their names and A whether or not they graduated.				24-APR-2002
A1		Please explain why your value system and this institution would be a good and this institution would be a good and the next 4 years.				28-AUG-2002
A1		Please provide your first reference.				11-SEP-2007
A1		Please provide your first reference's email.				11-SEP-2007
A1		Please cut and paste your letter of recommendation in the space provided.				11-SEP-2007
A1	10	Are you a citizen?				04-DEC-2002
A1	11	Were you born in California?				10-MAR-2006

Follow these steps to set up the web user defined questions.

- 1. Access the Web User Defined Questions Form (SAAWUDQ).
- 2. Perform an Insert Record function.
- 3. Select a value in the **Application Type** field.
- 4. Enter a number in the **Ordering Sequence** field.
- 5. Enter the question to be answered by the student in the **Question Text** field.
- 6. Click the Save icon.
- 7. Click the Exit icon.

## **Building Admissions Self-Service Applications** by Combining Sections

#### **Combining sections and elements**

In earlier steps, you reviewed or created Electronic Application Types (using STVWAPP) and reviewed delivered Web Application Sections (STVWSCT) and Web Application Elements (STVWSCF). Now it is time to combine the sections and elements to make an application. Sections include the actual questions that applicants are asked to answer, and each application is composed of a set of sections in a specific order.

#### Web Application Section Rules Form

The Web Application Section Rules Form (SAAWAPP) is used to define the sections and elements that make up each application type. It also is used to specify the address type for each section of an application that collects address information. This form allows the user to determine in what order the sections appear and in what order the data elements appear within a section. Users can designate an element as required on this form, as well as indicate if the element should display on the Web. Users can also assign specific questions that were previously defined on SAAWUDQ to a Web section.

#### Web Application Section—Data Element Rules window

Use the Web Application Section—Data Element Rules window to enter the data elements that display on a given section.

The first time you enter this window when defining a new section, all the data elements defined on STVWSCF for that Web section populate the window. The user can then reorder the elements and delete any not automatically marked as required. This window enforces the entry requirement of First and Last name, Street Line 1, City, and Choice of Study before an application can be marked complete.

This window allows updates to the **Order**, **Label**, **Question**, **Required**, and **Display Indicator** fields.

The Element Rules block is sorted by the **Display Order** field. When data elements initially populate the Element Rules block, their order is automatically set in increments of five. The user can update the **Display Order** field or delete an entire data element record.

The user can copy the sections and elements set up for another application type to a new application type by using the Copy Configuration icon.

#### **User-defined questions**

If the existing application type makes use of user-defined questions, those questions must also be defined on SAAWUDQ for the new application type prior to performing the Copy function. Otherwise, an error will occur when the copy is attempted.

#### Banner form

🩀 Web Appli	ication Section Rules	s SAAWAPP 8.0 (UDCSysT)	00000000000	0000000000			≤×
Web Application Type:				Сору	Configuration		
Display Order	Web Section	Section Rules Description	Address Type ▼	Required	Activity Date		
						f	
							1.1.1.1
							1111
						-	*
							×

#### **Steps**

Follow these steps to to define the sections and elements that make up each application type.

- 1. Access the Web Application Section Rules Form (SAAWAPP).
- 2. Select a value in the **Web Application Type** field.
- 3. Enter a number (to determine in what order the element will appear) in the **Display**

Order field.

4. Select a value in the **Web Section** field.

Example: International Information

5. Select a value in the **Address Type** field.

Note: The Activity Date field defaults when you save your work.

- 6. Click the Save icon.
- 7. Click the Exit icon.

# Establishing Dates for the Creation and Receipt of Students' Applications

#### Introduction

Define calendars for the application types that have different schedules on the Web Application Term Calendar Rules Form (SAAWATR). Once this form is used for an application type, it must always be used. This form allows the institution to define the dates when applications of each type can be created and subsequently viewed on the Web. This form works in conjunction with the Web Application Term Display Control Form (SOAATRM), where the calendar for all applications can be defined. If no rules exist on SAAWATR for an application type, then the rules defined on SOAATRM take effect.

gelectronic Applicant Web Calendar Rules SAAWATR 8.0 (UDCSysT)			000000000000000000000 ≚ ×
Web Application Type: 🛛 🛡 Term:		Copy Calendar 🛛 👔	)
Application Entry			
	Start Date	End Date	Activity Date
Application Display			
Term	Start Date	End Date	Activity Date

Follow these steps to define calendars for the application types that have different schedules.

- 1. Access the Web Application Term Calendar Rules Form (SAAWATR).
- 2. Select a value in the Web Application Type Code field.
- 3. Select a term in the **Term** field.
- 4. Navigate to the Application Entry block.
- 5. Select a term in the **Term** field.
- 6. Enter a date in the **Start Date** field for when applications of each type can be created.
- 7. Enter a date in the **End Date** field.
- 8. Navigate to the Application Display block.
- 9. Select a term in the **Term** field.
- 10. Enter a date in the **Start Date** field for when applications of each type can be viewed on the Web.
- 11. Enter a date in the **End Date** field when it can longer be viewed.
- 12. Click the **Save** icon.

Result: The Activity Date field defaults.

13. Click the **Exit** icon.

#### Introduction

Define the date ranges that you will receive applications for a term. The Web Application Term Display Control Form (SOAATRM) is used to specify these time periods.

#### Banner form

Term	Description	Start Date	End Date	Activity Date
200910	Fall 2008	03-0CT-2007	12-DEC-2008	03-OCT-2007
200820	Spring 2008	01-JUL-2007	01-JUL-2008	02-JUL-2007
200810	Autumn 2007	30-JUL-2007	01-JAN-2008	10-DEC-2007
200809	Session 2008-09	01-NOV-2007	31-DEC-2009	01-NOV-2007
200801	NZ Session 2007	01-NOV-2007	30-NOV-2009	04-NOV-2007
200720	Spring 2007	21-JUN-2006	01-AUG-2007	21-JUN-2006
200710	Fall 2006	01-JAN-2006	13-DEC-2006	13-DEC-2006
200708	Session 2007-08	01-JAN-2007	31-DEC-2008	02-OCT-2007
200640	Summer II 2006	01-FEB-2006	01-SEP-2006	18-FEB-2006
200630	Summer I 2006	01-FEB-2006	01-SEP-2006	18-FEB-2006
200620	Spring 2006	01-JUN-2005	01-FEB-2006	11-JUL-2005
200610	Fall 2005	01-JAN-2005	31-DEC-2005	18-SEP-2005
200607	Session 2006-07	01-JAN-2005	31-OCT-2007	01-NOV-2007
200520	Spring 2005	01-OCT-2004	15-MAY-2005	11-OCT-2004
200510	Fall 2004	03-OCT-2003	30-NOV-2004	05-NOV-2004
200506	Session 2005-06	01-JAN-2005	31-OCT-2006	28-NOV-2006
200430	Summer I 2004	25-APR-2004	01-AUG-2004	25-APR-2004
200420	Spring 2004	16-SEP-2002	01-JUL-2004	16-SEP-2002

#### **Steps**

Follow these steps to define the date ranges that you will receive applications for a term.

- 1. Access the Web Application Term Display Control Form (SOAATRM).
- 2. Select a value in the **Term** field.
- 3. Enter a date in the **Start Date** field to define the date range that you will receive applications for a term.
- 4. Enter a date in the **End Date** field to define the date range that you will no longer receive applications for a term.
- 5. Click the **Save** icon.

Result: The Activity Date field defaults.

6. Click the Exit icon.

#### Introduction

Control the calendar of applications in the Banner production tables using the Web Admissions Term Calendar Rules Form (SAAWAAD). This calendar determines by term, level, campus, college, and admit type when an application can be viewed (regardless of its source), when the status can be viewed, and when the most recent decision can be viewed on the Web.

The **Priority** (code) field is used to create a unique key for each calendar rule. It may be necessary to have multiple records for one level and term that start and end on the same date to exclude specific admit types from displaying on the Web. The **Priority** (code) field can be used to make each record unique.

Admissions Web Calendar Rules SAAW Term: Level: Campus:	AAD 8.0 (UDCSysT) 333	College		nennennennennennennen ⊻×
Term Term View Application	Level Priority	Campus T	College Admission Type           Image: Admission Type	Start Date End Date
View Application	Show Status		Show Decision	Activity Date:
View Application	Show Status		Show Decision	Activity Date:
View Application	Show Status		Show Decision	Activity Date:
View Application	Show Status		Show Decision	Activity Date:
View Application	Show Status		Show Decision	Activity Date:

Follow these steps to control the calendar of applications in the Banner production tables.

- 1. Access the Web Admissions Term Calendar Rules Form (SAAWAAD).
- 2. Select a term in the **Term** field.

Note: The **Term** field defaults from the previous form. If you would like to work with a different term, double-click the **Term** field and select the term you want.

- 3. Select a college in the **College** field.
- 4. Select a level in the **Level** field.
- 5. Select a campus in the **Campus** field.
- 6. Select an admission type in the **Admission Type** field.
- 7. Access the **Term** field

Note: in the next block; values default.

- 8. Enter a number to create a unique key for each calendar in the **Priority** field.
- 9. Enter the start date of when an application can be viewed in the **State Date** field.
- 10. Enter the end date of when an application can be viewed in the End Date field.
- 11. Click the **View Application** checkbox to allow applications to be viewed during the date range.
- 12. Click the **Show Status** checkbox to allow application status to be viewed during the date range.
- 13. Click the **Show Decision** checkbox to allow application decisions to be viewed during the date range.
- 14. Click the Save icon.
- 15. Click the Exit icon.

#### Introduction

Define codes, by application type, on the Web Application Customized Lists Form (SAAWADP) that should display in the Web menus for test codes, requested materials, interests, and credit card waiver reasons. If no codes are defined here, the menu values are taken from the appropriate Web-enabled rows on SOAXREF. If no codes are defined on SOAXREF, the values are taken from the appropriate validation table.

eb Application Cust /eb Application Tyj alidation Table Nat	pe:	DCSysT) 100000000000000000000000000000		1.00000000000000000000000000000000000
Table	Code	Description	User	Activity Date

Follow these steps to define the customized codes.

- 1. Access the Web Application Customized Lists Form (SAAWADP).
- 2. Select the Web application you have been working with in the **Web Application Type** field.
- 3. Select a value in the Validation Table Name field.
- 4. Navigate to the **Table** field.

Result: The table entered in the Key block defaults.

- 5. Select a code in the **Code** field to appear on the Web menu.
- 6. Repeat the above steps until all codes to appear on the Web menu are entered for the application type.

Note: The User and Activity Date fields default when you save your work.

- 7. Click the **Save** icon.
- 8. Click the **Exit** icon.

# Determining Use of Medical Information Question

#### Introduction

Determine whether you want to collect medical information on applications received via the Web. The data element, Medical, can be defined under the Personal Information section rule on SAAWAPP. This data element displays the Web-enabled values defined on SOAXREF (where the label is equal to STVMEDI). If no values are defined on SOAXREF, then the drop-down menu displays all values in the Medical Code Validation Form (STVMEDI).

	ication Section Rules SA	AWAPP 8.0 (UDCSysT)	3000000000			**************************************
Display Order	Web Section	Section Rules Description	Address Type ▼	Required	Activity Date	
						•

## **Steps**

Follow these steps to specify whether you want to collect medical information on applications received via the Web.

- 1. Access the Web Application Section Rules Form (SAAWAPP).
- 2. Select the Web application you have been working with in the **Web Application Type** field.
- 3. Enter a number (to determine in what order the element will appear) in the **Display Order** field.
- 4. Select *Personal Information* in the **Web Section** field
- 5. Click the **Save** icon.

Note: The Activity Date field defaults when you save your work.

6. Click the Exit icon.

#### Introduction

A Signature page is delivered with the Banner Web Admissions Application, and its display is controlled using the SIGPAGEDISP label rule on the Electronic Admissions Application Rules Form (SAAERUL) for the group of DISP. The Signature page allows you to provide processing instructions to applicants who submit applications via the Web.

Examples: Information such as *Remit an Application Fee of \$25*, or *Print, Sign, and Return this Page to the Admissions Office to Complete Your Application*, or any other information you wish to have the student complete as part of the Application Process.

#### Customizing the Signature page

The default Signature page is Info Text for the page. Sample Info Text for this page is delivered, but you can customize it to reflect your institution's processing and desired instructions. Use the Format HTML Letter Rules Form (SOAELTR) to update the Information Text for the Display Signature package to reflect your institution's desired instructions, if you decide to have the Signature page displayed.

You can customize the Signature page by application type using the Electronic Applicant Web Default Rules From (SAAWADF). The Signature Page Letters window is used to assign customized letters to specific letter types. The letter type of **Standard** is used to assign a Signature page for Web applicants not using QuickStart processing. The other letter types are used with QuickStart processing to identify which letter should be displayed, depending on the circumstances (i.e., a record is suspended during the automatic match).

Letter Code	Description	Allow Duplicates	Alternate Letter Code	Print Command	Activity Date
2005_AF_SOLIC	2005 Annual Fund Solicitation				06-OCT-2005
2ND_FOLLOW_UP	Second Follow-up Letter				22-NOV-2006
ACT_LIST	Activity List				10-OCT-2005
ACT_SEARCH_TAPE	ACT Search Tape Letter w/Card				23-AUG-1999
ADMIT_DECISION	Admissions Decision Letter				25-FEB-1998
ADM_2ND_ACKN	2nd App Acknowledgement				06-DEC-2006
ADM_ACKNOWLEDG	Admissions Acknowlwdgement Ltr				16-OCT-2000
ADM_APPL_ACKN	Admissions Application Ackn				23-MAY-1995
ADM_CHKL	Admissions Checklist Letter				17-MAY-1995
ADM_CHKLTEST	Testing CHKL variable				22-MAY-2007
ADM_COUNSELOR	Intro to Admission Counselor				09-NOV-2007
ADM_FA_INTEREST	Financial Aid Interest Letter				23-MAY-1995
ADM_INT_1	Admissions Interview 1 Letter				23-MAY-1995
ADM_LABEL	Admissions Label	Image: A start of the start			10-MAR-2006
ADM_RES_OFFER	Research Offer Letter				06-APR-2005
ADM_RES_REJECT	Research Rejection Letter				06-APR-2005
ADV_APPT	Advising Appointment				21-SEP-2005
AD_ACK_GIFTS	Gift Acknowledgement Letter				10-MAY-1995
AD_ACK_SPECIAL	Acknowledgement of Special Gif		AD_ACK_TWO		10-MAY-1995
AD_ACK_TWO	Second Special Ackn of Gifts				10-MAY-1995
AD_QUIK_RECPT	Quick On line Gift Receipt				10-MAY-1995
AFDM01	Annual 1st Direct Mail Solicit				27-FEB-2007

#### **Steps**

Follow these steps to create letter codes.

- 1. Access the Letter Code Validation Form (GTVLETR).
- 2. Perform an Insert Record Function.
- 3. Enter a code in the Letter Code field.

Example: ADM\_CHKL

4. Enter a description for your code in the **Description** field.

Example: Admissions Checklist Letter

- 5. Click the Save icon.
- 6. Click the Exit icon.

Letter ▼	Description	Module [▼]	Activity Date	User ID
ADMIT_DECISION	Admissions Decision Letter	A	11-JUN-2001	USER
ADM_2ND_ACKN	2nd App Acknowledgement	A	06-DEC-2006	DHARRISO
ADV_APPT	Advising Appointment	s	21-SEP-2005	USER
APPLHOLD	Application Hold	E	30-JUL-2004	USER
APP_ACK_EMAIL	Adm Acknowledgement e-Mail	A	06-APR-2005	USER
BRENT1	Brent's Ad Hoc Email Letter	R	02-NOV-2005	USER
BURSAR	Bursar Email Notification	s	13-FEB-2007	USER
CA_ADMISSIONS	Counselor Introduction	E	03-NOV-2003	USER
DECNERR	Error on Decision Record Lette	E	30-JUL-2004	USER
DEFAULT	Default Letter for Web App	E	30-JUL-2004	USER
DEPOSIT_RECVD	Student Deposit Received	s	31-OCT-2007	SNELSON1
EMAIL_APP_ACK	Email Application Acknowledgem	A	06-DEC-2006	USER
EMAIL_REMINDER	Reminder Email for Event	R	05-DEC-2006	USER
EVENT_DALLAS	Dallas Event Reminder Call	R	14-0CT-2005	USER
EXEMPTION	Exemption email	A	10-JAN-2008	DHARRISO
FALL_OPEN	Fall Preview Event	A	16-NOV-2007	BJOHNSON
FA_AWD_EMAIL_UK	FA Award Email UK	R	20-JUL-2006	USER
FA_AWD_MERGE	FA Award Ltr for Merge	R	02-FEB-2003	USER
FA_AWD_RESP_EMA	FA Award Response needed Email	R	08-NOV-2005	USER
FA_AWRD_W_COST	FA Award Letter with Costs	R	02-FEB-2003	USER
FA_EMAIL	Financial Aid Email Letter	R	13-MAR-2003	SHYCHE
FA_EXIT_LETTER	Financial Aid Exit Letter	R	06-SEP-2007	SHYCHE
FA_TRACKING	Missing Inform. Letter -FINAID	R	02-FEB-2003	USER

## **Steps**

Follow these steps to complete the process of creating letter codes.

- 1. Access the HTML Letter Rules Form (SOAELTL).
- 2. Select the letter code in the **Letter** field that you want to associate with the appropriate module code.
- 3. Select the appropriate code in the **Module** field.
- 4. Click the **Save** icon.
- 5. Click the **Exit** icon.

🩀 Format HTML Letter	Rules SOAELTR 8.0 (UI	OCSysT) 000000000000			
Letter Code:				Copy Letter	Image: A start of the start
Sequence Number	Formatting	Variable	Text		
		<b>•</b>	Text		
	<b>•</b>				<b></b>
	· · · · · · · · · · · · · · · · · · ·				
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	<b>v</b>				
	<b></b>				
	<b>*</b>				
	<b>*</b>				
	<b></b>				
	-				
	<b>v</b>				
	*				•
			Display Letter		

#### **Steps**

Follow these steps to construct letter contents.

- 1. Access the Format HTML Letter Rules Form (SOAELTR).
- 2. Select a code in the Letter Code field.
- 3. Enter a number indicating placement of variable and text in the email letter in the **Sequence Number** field.
- 4. Select a value in the Formatting field.
- 5. Select a variable in the Variables field.
- 6. Enter free-form text in the Text field.
- 7. Click the **Save** icon.
- 8. Click the **Display Letter** button to review letter.
- 9. Click the Exit icon.

Note: The package HWSKASGN organizes the letter and places it on the

Signature Web page after the application is marked complete.

	tive Term:
Default Curriculum E-Mail and Credit Card Rules Match	ing and Processing Rules Web Signature Letters
Default Curriculum	Effective Term:
Primary Curriculum	Secondary Curriculum
Curriculum:	Curriculum:
Campus: College: Degree: Program: Major: Department:	Campus:
User ID:	Activity Date:

### **Steps**

Follow these steps to customize the Signature page.

- 1. Access the Electronic Applicant Web Default Rules Form (SAAWADF).
- 2. Select a value in the **Web Application Type** field.
- 3. Select a term in the **Effective Term** field.
- 4. Perform a **Next Block** function.

Result: The information defaults.

- 5. Select a term in the **Effective Term** field in the Default Curriculum block.
- 6. Click the **Save** icon.
- 7. Select the Web Signature Letters tab.

ig Electronic Applicant Web Default Rules SAAWADF 8.0 (UDCSysT) 200000	
Web Application Type:	Term:
Default Curriculum E-Mail and Credit Card Rules Matching	and Processing Rules Web Signature Letters
Default Curriculum	
Level:	Effective Term:
Primary Curriculum	Secondary Curriculum
Curriculum:	Curriculum:
Campus:	Campus:
College: Degree:	College: Degree:
Program: Major:	Program:
Department:	Department:
User ID:	Activity Date:
L	

- 8. Select a code in the Letter Code field to view the codes.
- 9. Click the Return button to return to SAAWADF.
- 10. Click the **Save** icon.
- 11. Click the **Exit** icon.

oup:					Copy PRI	EL Group: 📳
roup	Rule Label	Rule Description	Value	EDI Indicator	System Required Indicator	Activity Date
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## **Steps**

Follow these steps to activate/inactivate the Signature page.

- 1. Access the Electronic Admissions Application Rules Form (SAAERUL) to Activate/Inactivate the Signature page.
- 2. Enter *DISP* in the **Group** field.
- 3. Enter SISPAGEDISP in the Rule Label field.
- 4. Enter *True* to Activate Signature page or *False* to Inactivate Signature page in the **Value** field.
- 5. Click the **Save** icon.
- 6. Click the Exit icon.

<b>m N</b>	SUNGARD	HIGHER EDUCATION	
		Enter Secure Area Prospective Students Apply for Admission	
		General Financial Aid Campus Directory Class Schedule	
	REL	Course Catalog Alumni & Friends EASE: 8.0	

### **Steps**

Follow these steps to customize Info Text.

- 1. Select the Enter Secure Area link from the Web Self-Service homepage.
- 2. Enter your user ID or *710000011* in the **User ID** field.

User ID:	
PIN:	
-	
Login	Forgot PIN?

3. Enter your personal identification number in the **PIN** field.

Note: If you are using 710000011 (Eugene Adams) as your login ID, the PIN should be 123456. If the PIN does not work, click the **Forgot PIN?** button. The answer to the question "What color is the sun?" is *Yellow*. Reset the password to 123456.

4. Click the **Login** button.

- 5. Click the **WebTailor Administration** tab.
- 6. Select the Web Menus and Procedures link.

Search Go		MENU SITE MAP	HELP
Customize a Web Men	nu or Procedure		
Gelect Create to add a new Web Menu	u or Procedure.		
Create			
	hing. i.e. %=match any number of characters _=match 1 character.		
earch by Name:	will be found if the text is located anywhere in the field. i.e. if you enter car, main OR Search by Description:	atches will be found on <b>Car</b> olina, ma <b>car</b> oni, and bo	ox <b>car</b>
earch by Name: Search elect one of the available procedu	OR Search by Description:	atches will be found on Carolina, macaroni, and bo Enabled Source	ox <b>car</b>
earch by Name: Search elect one of the available procedu rocedure Name	OR Search by Description:		oxcar
earch by Name: Search elect one of the available procedure rocedure Name DisplayPersonTSDriver	OR Search by Description:	Enabled Source	ox <b>car</b>
search by Name: Search Search Elect one of the available procedu rocedure Name DisplayPersonTSDriver onfirm.DednFlexSpendUpdate	OR Search by Description:	Enabled Source Y B	ox <b>car</b>
Search by Name: Search Select one of the available procedur ocedure Name DisplayPersonTSDriver confirm.DednFlexSpendUpdate confirm.DednHealthUpdate	OR Search by Description: Uures Procedure Description Approver Detailed Flexible Spending Account Update Confirmation	Enabled Source Y B Y L	xcar
Search by Name: Search elect one of the available procedu ocedure Name DisplayPersonTSDriver confirm.DednFlexSpendUpdate confirm.DednHealthUpdate confirm.DednMiscUpdate	OR Search by Description:	Enabled Source Y B Y L Y L	ox <b>car</b>
Search by Name: Search elect one of the available procedu rocedure Name DisplayPersonTSDIver confirm.DednFlexSpendUpdate confirm.DednMiscUpdate confirm.DednMiscUpdate confirm.DednRetirementUpdate	OR Search by Description:	Enabled Source Y B Y L Y L Y L Y B	ox <b>car</b>
Search by Name: Search Relect one of the available procedure procedure Name _DisplayPersonTSDriver confirm.DednFlexSpendUpdate confirm.DednHealthUpdate confirm.DednHealthUpdate confirm.DednRetirementUpdate confirm.DednTaxUpdate	OR Search by Description:	Enabled Source Y B Y L Y L Y B Y B Y B	xcar
Search by Name:	OR Search by Description:	Enabled Source Y B Y L Y L Y B Y B Y B Y B Y B	xcar

- 7. Select *hwskalog*.*P\_DispSigPage* from the **list**.
- 8. Scroll to the bottom of the page and click on **Customize Information Text**.
- 9. Edit/add info text and adjust order as needed.
- 10. Click the **Exit** icon.

### Introduction

The Electronic Applicant Web Default Rules Form (SAAWADF) is used for entering default data and rules for curriculum, email address, link text, and credit cards, as well as customizing the Signature page on the Web for a given Web application type.

The keys to the record are the Web application type and an effective term. The effective term code in the Default Curriculum block may be different than the effective term in the key. For a curriculum to be used on this form, it must first be set up on the EDI Cross-Reference Curriculum Rules Form (SOAXCUR). If the term and curriculum are entered on this form, the curriculum data automatically populates the student's application when the electronic application is created. The Web data section for curriculum does not have to be displayed on the Web application. If the section is displayed, the curriculum entered on SAAWADF automatically fills in.

### Defining the email address and email link text

The form can be used to define the email address and the email link text that appears on the Application Checklist menu on the Web page. If no link text or email address exists on this form, but the EMAILSENDADDR and EMAILSENDLINK rules exist on SAAERUL where the value in the **Group** field is equal to ADMS, then that link text displays on the Application Checklist menu and that email address becomes the To: address.

### Defining credit card processing rules

The Application Credit Card Fee Rule window on SAAWADF is used to define the credit card processing rules. The institution indicates if they accept credit cards, and if they do, the following decisions must be made: are they required, are waivers allowed, what detail code should be associated with the payment, and what, if any, checklist rule is satisfied by the credit card payment. The **Detail Code** and **Dollar Amounts** are required fields, and the **Detail Code** field must have a category code of APF.

🙀 Electronic Applicant Web Default Rules SAAWADF 8.0 (UDCSysT) 🎲	$\times \mathbf{x}$
Web Application Type:	ective Term:
Default Curriculum E-Mail and Credit Card Rules Mate	hing and Processing Rules Web Signature Letters
Default Curriculum	
Level:	Effective Term:
Primary Curriculum	Secondary Curriculum
Curriculum:	Curriculum:
Campus: College: Degree: Program: Major: Department:	Campus: College: Degree: Program: Major: Department:
User ID:	Activity Date:

## **Steps**

Follow these steps to customize default data and rules for curriculum, email address, link text, and credit cards, as well as customizing the Signature page on the Web for a given Web application type.

- 1. Access the Electronic Applicant Web Default Rules Form (SAAWADF).
- 2. Select the Web application you have been working with in the **Web Application Type** field.
- 3. Select a term the **Term** field.
- 4. Perform two Next Block functions.
- 5. Select a curriculum in the **Curriculum** field in the Primary Curriculum block.

Note: For a curriculum to be used on this form, it must first be set up on the EDI Cross-Reference Curriculum Rules Form (SOAXCUR)—(this form is reviewed later in the workbook). If the term and curriculum are entered on this form, the curriculum data automatically populate the student's application when the electronic application is created.

6. Click the **Save** icon.

7. Select the E-mail and Credit Card Rules tab.

	cant Web Default Rules SAAWADF 8.0 (UDCSysT) 2000/000000000000000000000000000000000
Default Cur	
Checklist En Email Address: Link Text:	
Application ( Charge Detail:	Credit Card Fee Rule
Processing:	APPF       Application Fee Charge       Amount:       50.00       Application Fee Admission Request:       AP50       \$50 Application         Allow Credit Card       Require Credit Card       O Not Allow Credit Card
□ Allow Waive ☑ Transactions	er s to Miscellaneous Table
	Return

- 8. Enter an email address in the Email Address field.
- 9. Enter the text that displays on the Application Checklist menu in the **Link Text** field.
- 10. Perform a **Next Block** function.
- 11. Select a value in the Charge Detail field.

Example: Application Fee

- 12. Enter a dollar amount in the **Amount** field.
- 13. Click the appropriate radio buttons and/or checkboxes (Allow Credit Card, Require Credit Card, Do Not Allow Credit Card, Allow Waiver, Transactions to Miscellaneous Table).
- 14. Click the **Save** icon.
- 15. Click the Return button.
- 16. Click the **Exit** icon.

## **Behind the scenes**

QuickStart processing begins automatically when either:

- The Application Complete icon is clicked on the Web Application Checklist page, and credit card processing has been turned off for the application type on SAAWADF, or
- Credit card processing is enabled on SAAWADF and:
  - The applicant selects the Pay Later icon on the Application Fee Payment page.
  - The applicant selects the **Signature Page** icon from the Payment Status page after successfully processing their credit card payment.

## Step 1

The match package is run to determine if the Web applicant matches an existing Banner person. The processes indicated in the steps below, i.e. "verification routines" run automatically when Quick Start is set up.

## Step 2

If the match package returns a status of **S** (Suspended) or **E** (Error), then the application status code is updated on SAAEAPS, and the Display Signature package (hwskalog.p\_dispsigpage) displays the letter code associated with the SUSPENSE or MATCHERR letter types respectively.

## Step 3

QuickStart processing checks to see if the **Automatically Create Application Record** checkbox is checked on SAAWADF. If it is checked, the verification routines run automatically (the same routines as run on SAAEAPS or with the SARETMT process).

If any errors are encountered during the verification process, the **Status App** field on SAAEAPS is updated appropriately, and the Signature Display package (hwskalog.p\_dispsigpage) displays the letter assigned to the VERERR letter type on SAAWADF.

## Step 4

Now the create\_appl package is run. It first checks for the existence of an application hold for the Web applicant (assuming they had matched someone in Banner).

If an application hold exists, then the **Status Application** field on SAAEAPS is updated appropriately, and the Display Signature package displays the letter assigned to the APPLHOLD letter type on SAAWADF. If no application hold exists, the application is created.

## Step 5

If the **Automatically Create Application Record** checkbox is checked, then you can optionally request that a decision record be created as well. The decision record uses the admissions decision code stored on the Automated Processing Rules window of SAAWADF. Just as with SAAQUIK, no decision code with the **Inactive Application** checkboxes checked on STVAPDC can be created.

In addition, the **Automatically Create Student Record** checkbox must be checked to have a decision record inserted. If QuickStart processing indicates that a student record cannot be created, then no decision record is inserted if the decision code would generate a student record.

## Step 6

If the **Automatically Create Recruit Record** checkbox is checked, run the create\_recruit package to create a recruit record on SRBRECR.

## Step 7

If the **Automatically Create Student Record** checkbox is checked, look at the **Auto Student** checkbox on SAAWCUR and SOAXCUR for the applicant's curriculum to see if QuickStart processing is allowed for that curriculum.

If QuickStart processing is not allowed for the curriculum, then no student record is created, and the letter associated with the standard letter type is displayed. If you selected the option to create a recruit or application record, these will be created.

### Step 8

If QuickStart processing is allowed for the curriculum and the match status returned earlier is  $\mathbf{N}$  (New), a student record is created for the Web applicant, and the Signature page is displayed with the letter assigned to the QUIKADMIT letter type.

## Step 9

If the match status returned earlier is M (Match), SOAEQUI is queried to see if the Web applicant's most recent Banner student record and Web application match any of the exception processing rules on the form.

If one or more rules match, then the rule with the highest priority number is used (1 = highest), and no student record is created. If that rule has a letter code associated with it, then that letter is displayed as the Signature page.

If no letter code exists, then the letter associated with the NOSTUREC letter type is displayed. If no letter code has been assigned to the NOSTUREC letter type, then the letter associated with the DEFAULT letter type is displayed. If no letter has been assigned to the DEFAULT letter type, the default WebTailor letter is displayed.

### Application status errors and resolutions

The following table shows possible application status codes that can be generated by the QuickStart process and how they may be resolved. They can be viewed on SAAEAPS.

Application Status Code	Description/Resolution
	Admissions Hold
	If an admissions hold exists for an applicant, their application status is updated to H, and their record cannot be pushed on SAAEAPS until the hold is removed on SOAHOLD. Even if the hold is removed, only an application record can be created, not a student or decision record.
	Perform the following steps
	• Remove the hold on SOAHOLD, if appropriate.
	• Run the Verification Process by selecting <b>Verify Application</b> from the Options menu of SAAEAPS. This process runs even though the Status App field is set to <i>H</i> .
	• Run the Load Application process by selecting <b>Load Application</b> from the Options menu in the main window of SAAEAPS. Assuming no other errors occur, the application should be pushed. It will not, however, automatically create a student record if that was indicated for the application type on SAAWADF. The institution has to do that manually. It will create the recruit record though, if that was indicated on the Automated Processing rules window of SAAWADF.
	• You can also run SARETMT to verify and push the application having an application status of <i>OK H</i> , as long as the hold has been removed

Application Status Code	Description/Resolution
1	Can't Insert Decision Code
	This error is received when you are trying to create a student record and the system knows that one or more of the rules governing the creation of a student record would be broken in doing so.
	For example, if a student record already exists for the same term as the newly created QuickStart application, the insert of a new student record would fail, because you cannot insert a new student record if one already exists for the same term.
	However, all other items defined by the indicators in the Automated Processing Rules window of SAAWADF, as well as items defined by the SAAECRL rules, are still processed.
	So, the QuickStart applicant would not have a new student record created, but they could have an application record created, additional personal data updated on SPAPERS, test score data added, an application and recruit record created, and additional items.
Р	Push Error
	This error rarely occurs. It is usually caused by invalid data or data that is not acceptable to the database because of indices. If a push error occurs, the part of the process receiving the error is not pushed. All other pieces are pushed.
	For example, if a question/answer receives a push error, the recruit, application, and student record is still created along with person data.

Application Status Code	Description/Resolution
R	Match Error
	Perform the following steps:
	Use the Person Search or Create Person options in the Options list from the Applicant and Application Manual Verification window on SAAEAPS to mark the record with the match error as New or Matched.
	Mark any of the other manual verification steps as complete in the Manual Person Verification Steps block and save the changes.
	Return to the main block, where the Status Pers and Status App fields should both be set to Y.
	Now, you can either manually verify and push the application on SAAEAPS or run the SARETMT process to automatically re-verify and push the application.
v	Verification Error
	You can go to SAAEAPS to try and override the verification error if the correct override indicators were set on SAAECRL. Perform these steps:
	Select the <b>Review Results</b> option in the Options menu in the main window of SAAEAPS to access the Verification/Load Results window.
	Scroll through the procedures in the System Verification Procedures block until you find the procedure(s) where the Comp(lete Indicator) checkbox is blank.
	Click on the O/R (Override Indicator) checkbox for this procedure. If an override is allowed for this procedure, you can check the box and then save the change.
	Return to the main block of SAAEAPS. You can manually verify and push the application or run SARETMT to automatically re-verify and push the application.

Application Status Code	Description/Resolution
U	Suspended Record
	Perform these steps:
	Select the <b>Manual Verification Steps</b> option in the Options menu in the main window of SAAEAPS to access the Applicant and Application Manual Verification window.
	Select the Step field that has a value of IDVR (ID verification).
	Select the <b>Person Search</b> option from the Options menu to access SOQMTCH.
	Query the production database on SOQMTCH to see if a match occurs. * If a match occurs, select the Match icon. This automatically matches the electronic application to the matching record in Banner. It also checks the IDVR step. * If a match does not occur, exit SOQMTCH.
	Select the <b>Create Person</b> option from the Options list in the Applicant and Application Manual Verification window. This takes you to the Create Person window, where you can indicate which type of ID to use when creating the person in Banner.
	After selecting the ID type, save your work and then click Return. The IDVR step is checked, and the Status Pers field is set to $Y$ .

🙀 Electronic Applicant Web Default Rules SAAWADF 8.0 (UDCSysT) 🤅	$ \mathbf{x}  \ge$
Web Application Type: 📃 💌 Ef	fective Term:
Default Curriculum E-Mail and Credit Card Rules Ma	tching and Processing Rules Web Signature Letters
Default Curriculum	
Level:	Effective Term:
Primary Curriculum	Secondary Curriculum
Curriculum:	Curriculum:
Campus:	Campus:
College: Degree:	College: Degree:
Program: Major:	Program: Major:
Department:	Department:
User ID:	Activity Date:

## **Steps**

Follow these steps to build Quickstart processing.

- 1. Access the Electronic Applicant Web Default Rules Form (SAAWADF).
- 2. Select the Web application you have been working with in the **Web Application Type** field.
- 3. Select a term the **Term** field.
- 4. Perform a **Next Block** function.
- 5. Select the Matching and Processing Rules tab.

🤠 Electronic Applicant Web Default F	Rules SAAWADF 8.0 (UDCSysT) 200000000000	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Web Application Type: QS 💌	Continuing Education/WFD Effective Term:	
Default Curriculum 8	E-Mail and Credit Card Rules Matching and Proce	ssing Rules Web Signature Letters
Web Matching Rules		Web Display Rules
Interface Code: Application Source: Application SBGI Source: ID:	WEE VWeb Prospect Load WEB VWorld Wide Web WWWAP VWWW Applicant Generated ID SSN Web ID	Maximum number of Majors:       2         Maximum number of Minors:       1         Maximum number of Concentrations:       1         Maximum number of additional Majors:       1         Return       1
Automated Processing Ru	les	
🗹 Enable QuickStart Processing	1	Admission Decision: 35 💌 Cleared to Attend
Automatically Create Recruit	Record	☑ Provide Access to Student Self-Service
Automatically Create Applicat	tion Record	Create one application
Process Decision		(Return )

- 6. Select an interface code in the Interface Code field to be used by QuickStart.
- 7. Select an application source in the **Application Source** field.
- 8. Perform a **Next Block** function.
- 9. Click the Enable QuickStart Processing checkbox.
- 10. Select an admission decision in the **Admission Decision** field.
- 11. Choose the QuickStart features you would like to use by checking the appropriate checkboxes.

**Automatically Create Recruit Record** - When checked, a recruit record is created for the Web applicant.

**Automatically Create Application Record** - When checked, an application record is created for the Web applicant.

**Process Decision** - When a decision code is selected, an admissions decision record is created on SARAPPD.

**Automatically Create Student Record** - When checked, a student record is created on SGBSTDN, as long as no matching record is found on SOAEQUI.

**Provide Access to Student Self-Service** - Once the applicant has a student record, she or he can now register for classes through Student Self-Service.

Create one application - When checked, only one recruiting and/or application

record will be created, and all curricula entered will be associated with that one record.

- 12. Click the **Save** icon.
- 13. Select the Web Signature Letters tab.

1		Web Default Rules SAAWADF 8		000000000000000000000000000000000000000		***************
		ype: QS 💌 Continuing Educat		Effective Term:	]	
	Default Curricu	lum E-Mail and Credit (	Card Rules M	Matching and Processing Rul	es 🧴 Web Signature Letters	
	Web Signature	Letters				
	Letter Code	Description	Letter T	Type Description	n User ID	Activity Date
			•			
	QUICK_ADMIT	Quick Admit Acknowledgement		IT Standard Quick Start	Sign Let MWILECZE	13-JUN-2002
		Quick Admit Acknowledgement		IT Standard Quick Start	Sign Let MWILECZE	13-JUN-2002
		Quick Admit Acknowledgement		IT Standard Quick Start	Sign Let MWILECZE	13-JUN-2002
		Quick Admit Acknowledgement		IT Standard Quick Start	Sign Let MWILECZE	13-JUN-2002
		Quick Admit Acknowledgement		IT Standard Quick Start	Sign Let MWILECZE	13-JUN-2002
		Quick Admit Acknowledgement		IT Standard Quick Start	Sign Let MWILECZE	13-JUN-2002

- 14. Select a letter code in the Letter Code field.
- 15. Select a letter type in the **Letter Type** field.
- 16. Click the **Save** icon.
- 17. Click the Exit icon.

# Updating or Defining the Procedures and Routines for Each Application Type

## Introduction

Before loading data from the holding tables into the permanent Banner tables, you want to make sure that the information submitted by the applicant is as complete and correct as it possibly can be. Application procedures and routines perform much of this work.

When a web application is submitted, the data does not go directly into Banner permanent tables, but instead to temporary tables to be reviewed and then "PUSH" to the permanent Banner tables.

#### **Procedures and routines**

A procedure is a collection of routines. Routines check data at the data element level, and a number of routines may be included within a procedure. Procedures are closely related to each table into which data is loaded. All required routines must be satisfied before a procedure can be satisfied. A set of procedures and routines has been delivered and is attached to each of the delivered Application Types.

Procedures and routines are attached to each Electronic Application Type using the Electronic Admissions Procedure/Routine Control Form (SAAECRL). This form also includes several flags that specify how each procedure and routine will be used in electronic application processing.

	s Procedure/Routine Control SAAECRL			Copy Proc		9999999999999999 ≚ ×
Procedures Procedure	Description	Required	Override	System Required	Number of Routines	
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		]				
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		]				
		]				
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		<b>1</b>				
		]				
		]				•

## **Required Flag and Override Flag checkboxes**

Both the Procedures section of the main window and the Routines section of the Admissions Verification and Load Routines window include a **Required Flag** checkbox and an **Override Flag** checkbox.

The **Required Flag** checkbox is used to specify the procedures and routines that are attached to each electronic application when it is received. When a procedure or routine is attached to an application, it needs to be fulfilled before the application is considered verified and before the data is *pushed* to the permanent Banner tables. More specifically, each routine needs to be fulfilled before the overall procedure can be satisfied.

#### **Procedures and routines**

The procedures and routines control the types of data that is verified and eventually pushed into Banner. You can set procedures and routines to Not Required if you do not wish certain data to be verified or loaded into Banner.

Example: You might choose not to load Medical Conditions from electronic applications. You would set the **Required Flag** checkboxes for Procedure P060 (Health Conditions Verification) to unchecked (*N*), and also set the **Required Flag** for Routine R0080 (Create Medical Conditions) in Procedure P900 (PUSH Verification) to unchecked (*N*). This would tell the system not to verify Medical Conditions and not to push them into Banner.

The Override Flags associated with procedures and routines allow you to specify whether a routine or procedure can be overridden manually at the individual application level on SAAEAPS or automatically using the Elec Appl Verify/Load Process (SARETMT). If a Routine or Procedure is overrideable, it still is attached to an electronic application (based on the Required Flag), but can be overridden if desired.

Example: You may normally collect required visa types from international applicants but not all applicants may understand the visa type they require. You could require visa types from international applicants, but allow the push of visa information to be overridden if an applicant does not provide the correct information. In this case, you would check the **Required Indicator** checkboxes for Procedure P032 (International Information Verification) including all of its routines to checked ( $\mathcal{Y}$ ), but set the **Override Indicator** checkbox for Routine R0030 (Create International Record) in Procedure P900 (PUSH Verification) to checked ( $\mathcal{Y}$ ) so that you could override the push of this information.

#### **Process**

The Elec Appl Verify/Load Process (SARETMT) automatically overrides a procedure or routine that fails the verification process because of empty data, if that procedure or routine is marked as able to be overridden on SAAECRL and the AUTOOVERRIDE label for the group VCRL on SAAERUL is set to *Y*.

For Web Application Types delivered by SunGard Higher Education, all appropriate procedures and routines already have been attached to each application type. If you define additional application types, you need to attach the appropriate procedures and routines to each new application type. You can do so automatically by using the Copy Procedure icon in the Key Block of SAAECRL. The Copy Procedure icon allows you to copy all the procedures and routines defined for any existing application type to your new application type.

#### **Steps**

Follow these steps to attach procedures and routines to each Electronic Application Type .

- 1. Access the Electronic Admissions Procedure/Routine Control Form (SAAECRL).
- 2. Select the Web application you have been working with in the **Web Application Type** field.
- 3. Enter a value in the **Procedure** field.

Note: If there are no blank lines left, perform an Insert Record function.

- 4. Enter a description in the **Description** field.
- 5. Select the appropriate checkbox(es)—Required, Override, System Required.
- 6. Enter a number in the **Number of Routines** field.
- 7. Click the **Save** icon.
- 8. Set the cursor on your first procedure.
- 9. Select Routines from the **Option** menu.
- 10. Enter a value in the **Routine** field.
- 11. Enter a description in the **Description** field.
- 12. Click the appropriate checkboxes(es)- Required, Override, System Required.
- 13. Click the **Save** icon.

- 14. Perform a **Next Block** function to return to the Electronic Admissions Procedure/Routine Control Form (SAAECRL).
- 15. Repeat steps 9 through 15 for all Procedures created
- 16. Click the **Exit** icon.

#### Introduction

The Electronic Admissions Application Rules Form (SAAERUL) includes a number of rules that control how data is handled. All rules that are used by system processing have been delivered by SunGard Higher Education and should have been installed during the upgrade process.

#### How rules are categorized

For convenience purposes, rules are categorized into groups found in the EDI Rules Group Validation form, STVEGRP. Rule groups are used to display rules with a similar purpose together, and group codes can be used to specify that you want to display only a single group of rules at one time.

#### How the Value for Rules are updated

A label and a description also identify each rule. The script that installed the rule groups and rules also installed either the specific value expected for a rule or the literal UPDATE ME in the **Value** field. When an actual value was delivered, its **EDI Standard Indicator** checkbox was checked (set to Y) indicating that the rule expects an EDI value, and the value for these rules should not be changed. When the literal UPDATE ME was delivered, the value must be updated to reflect the local option for EDI application processing to be used.

#### When reviewing and updating rules...

When reviewing and updating rules, you may want to query on the **Value** field for the value UPDATE ME. After updating the appropriate rows, you may want to review all rules so that you better understand how data will be processed.

•					EL Group: 🍺
Rule Label	Rule Description	Value	EDI Indicator	System Required Indicator	Activity Date
i					
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i ;					
i					
h					
				_	
h					
}					
				Rule Label         Rule Description         Value         EDI           Image: Second S	Rule Label       Rule Description       Value       EDI Indicator       System Required Indicator         Image:

## **Steps**

Follow these steps to review and update the application rules.

- 1. Access the Electronic Admissions Application Rules Form (SAAERUL).
- 2. Select *ADMS* in the **Group** field.
- 3. Perform a Next Block function to populate the form.
- 4. Update the value in the **Value** field if the **Value** field contains UPDATE ME.

Note: The value must be updated to reflect the local option for Self-Service or EDI application processing to be used.

- 5. Click the **Save** icon.
- 6. Perform a **Rollback** function.
- 7. Repeat step 2-6 for all rules connected to groups pertaining to the Self-Service application, which depending on your application, can include the following: ADDR, ADMS, ATYP, CHKL, CURR, ENTY, DISP, FLVL, LGCY, PCOL, PQLF, QSTN, RESD, RLTN, TELE, VCRL.
- 8. Click the **Exit** icon.

## **EDI Cross-Reference Rules**

Although much of the setup on the EDI Cross-Reference Rules Form (SOAXREF) may not be required for your Web Admissions applications, your EDI admissions application processing still relies heavily on the use of SOAXREF.

#### **Purpose of SOAXREF**

SOAXREF is used mainly by Web Application processing to customize what values the applicant sees in the various drop-down menus available on the Web application. If an institution wants all values within a validation table to display in the Web menu, then no data from that validation table should be inserted into SOAXREF. For example, because most institutions want all state and province codes to display in the state menu, no state or province codes need be inserted into SOAXREF. If, however, an institution would like to customize what values from a validation table display in the Web menu, then they can either use the appropriate script to insert all values from the validation table and then check the **Web Indicator** checkbox for those values that should display, or they can manually insert only those values that should display on the Web (remembering to check the **Web Indicator** checkbox).

#### Other forms used

Data pertaining to which majors a Web applicant can select must be entered on SOAXREF as well as on SOACURR. The institution also can decide to default in a curriculum for a given application type. In that case, the major information comes from the Electronic Applicant Web Default Rules Form (SAAWADF). This form also uses the curricula defined on SOAXREF and SOAXCUR.

#### Web-enabled rows

Not all rows in SOAXREF are used in Web Admissions application processing. Many rows are used only to process incoming TS 189 transaction sets received through EDI. Other rows may be used only to process incoming AMCAS records for medical school applications. Regardless, only rows that are completely Web enabled are available for display in the Web Admissions application menus.

A Web-enabled row is one that

- exists in SOAXREF
- has an EDI Value, and perhaps, an EDI Qualifier (depending upon the type of data reflected in the rule)
- has the Web Display Indicator check box checked (set to *Y*)
- has a description
- has a Banner value.

#### Some guidelines

In many cases, the only thing you need to do is ensure that all the values you want displayed on the Web exist on SOAXREF and that the description clearly represents the value you want the student to select. However, in some cases, you may need to build additional rules.

Example: The values delivered for the label STVDEGC (e.g., Degree Level - Degree Codes) are generic EDI Degree Levels (Associate, Baccalaureate, Master). Web-enabled values for this label are displayed when a transfer applicant is asked about the degree pursued or earned at a prior college, and you may want to collect information about specific degrees (e.g., Associate of Technology, Bachelor of Arts, Master of Sciences) and have values in the corresponding Banner validation table that reflect these specific degrees. In these cases, you need change the value to an existing value in the STVDEGC validation table for the **Value** field, and you should make sure that the value does not already exist for the label on another row. For these rules, you set the **Standard** checkbox to unchecked (set to *N*).

Cross-Reference Rules							Copy Table: 📳
oss-Ref ectronic Label	erence Rules Electronic Qualifier	Electronic Value	EDI	Web	XML	Banner Value	Description
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			] 🗆				
			T 🗆				
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#### **Steps**

Follow these steps to create and update the cross-reference rules.

- 1. Access the EDI Cross-Reference Rules Form (SOAXREF).
- 2. Select STVATYP Address Type Codes in Cross-reference Label field.
- 3. Perform a **Next Block** function to access the Cross-Reference Rules block.
- 4. Define the appropriate address types on SOAXREF using the label STVATYP.

Note: The Web-enabled rows must contain a Banner value.

- 5. Click the **Save** icon.
- 6. Perform a **Rollback** function.
- 7. Repeat the above steps for the following cross-reference labels.

Telephone Types STVTELE

#### EDI Major

#### STVMAJR State/Provinces

STVSTAT

Nation
--------

Ethnicity STVETHN

Note: These values must also be built in SOAXCUR.

8. Click the Save icon.

#### **Steps**

Follow these steps to define multiple major codes on SOAXREF.

Note: You will also use the Curriculum Rules Form (SOACURR) in this procedure.

- 1. Enter the label *STVMAJR* in the **Cross-Reference Label** field to create SORXREF values for multiple major codes that use the same CIP Code.
- 2. Query for the first CIP code that may have multiple values.
- 3. Enter the CIP code and query on it in the **Electronic Value** field.

Note: Review the values that exist, or add new values for the majors.

4. Enter *81* in the **Electronic Qualifier** field.

Note: 81 is the major code qualifier for CIP codes.

5. Enter a value that is different than any existing CIP code in the **Electronic Value** field.

Note: For the first major code you define in a set, you might use the actual CIP code.

6. Enter the major code for one of the majors represented by the CIP code in the **Banner Value** field.

Note: For every other major code that uses the same CIP code, create one line on SOAXREF. On each line, you need to enter a different EDI value in the **Electronic Value** field. For example, you might merely put a letter at the end of the CIP code. Specifically, Accounting (major code ACCT) might use an EDI value of 060201, and Fund Accounting (major code ACTF) might use an EDI value of 060201A.

7. Access the Curriculum Rules Form (SOACURR).

Base	Rule Number									
		Program	Level	Campus	College	Degree	Effective Term	Primary	Secondary	Locked

- 8. Review entries in the Curriculum Rules Form (SOACURR) to ensure that you have an entry for each major. If you do not, create the entry because cross-reference rules are dependent on curriculum rules.
- 9. Define the electronic curriculum cross-reference values for the newly created major codes on SOACURR.
- 10. Query for the first major code.

Note: Review the electronic cross-reference information in the line that displays. You may need to define cross-reference values.

11. Access the Majors and Departments tab.

ase Curriculu	um Rules 🛛 Majo	rs and Depa	tments Major-C	Dependent Conce	ntrations	Minors		Module C	Control	
Aajors an rom Term: rogram:	d Departmen			lum Rule Term Ra Campus:	inge College		Term: 99 aree: BF	9999		
rom Term:	000000	Departmen	Multiple E	ffective Terms Pr Concentration	esent			0810 Academic History	Major CAPP Rule	
Major ACTS Actu	uarial Science		τ School of Finance		Recruiting	Admissions		History		
DI and S Display on Self Service		Self Service	Description	EDI Degree	EDI Level	Generate Identification		EDI Iden	ntification	

- 12. Enter the appropriate degree level code in the EDI Degree field.
- 13. Click the **Display on Self-Service** checkbox.
- 14. Enter a Web display description in the **Self-Service Description** field which will display in the **Planned Course of Study** drop-down menu on the Web.
- 15. Click the **Save** icon.
- 16. Repeat these steps until you have appropriate cross-reference values defined for all major codes.
- 17. Review your updates by accessing the Planned Course of Study page for a Web Admissions application.

Result: The programs you have just defined should display.

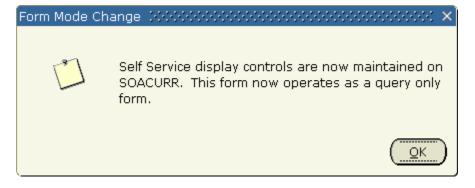
# Customizing Curriculum Rules and Defining EDI Cross- Reference Curriculum Rules

### Introduction

In Banner, a student's academic program is defined by a combination of the data elements program, campus, college, level, degree, and major, and these data elements must be valid alone and in combination. When an applicant completes an application for admission, it is not likely that they would know all of the valid combinations of these elements.

### Forms used

To make Web program choice selection clearer and easier, use the Curriculum Rules Form (SOACURR). In previous versions of Banner, you would have used the EDI Cross-Reference Curriculum Rules Form (SOAXCUR). When you access SOAXCUR for the first time in a Banner session, you will receive this message:



Before beginning Web Application processing, you need to update the curriculum crossreference rules with appropriate EDI values. All EDI and Web display control items are located in one centralized location on SOACURR. SOAXCUR and SAAWCUR, which were previously used for updating self-service controls, are query-only forms.

### **Specifics**

On the Curriculum Rules Form (SOACURR), you will update the **EDI Degree** and **EDI Level** fields. In addition, you need to update the **Display on Self Service** checkbox and **Self Service Description** field for all curricula that are available for Web selection.

If a specific curriculum rule is not allowed with QuickStart processing, then the **Auto Student** checkbox must be unchecked. This curriculum may stay displayed on the Web application, but a student record is not created using this curriculum.

### **Banner form**

🔋 Curriculum Rules - SOACURR - 8.0 - (UDCSysT) - 55555555555555555555555555555555555
Term: 200710 Fall 2006
Base Curriculum Rules Majors and Departments Major-Dependent Concentrations Minors Module Control
Majors and Departments
From Term:     000000     Base Curriculum Rule Term Range     To Term:     999999       Program:     2201ACTS     Level:     UG     Campus:     College:     20     Degree:     BFIN
From Term: 000000  Multiple Effective Terms Present To Term: 200810
General Academic Major Major Department Concentration Recruiting Admissions Student History CAPP Rule
Actis       Actuarial Science       Z01       School of Finance       Image: Constraint of the science       Image: Conscience       Imag
EDI and Self Service Display on Auto Generate Self Service Student Self Service Description EDI Degree EDI Level Identification EDI Identification Image: Self Service Description
Actuarial Science

### **Steps**

Follow these steps to customize curriculum rules.

- 1. Access the Curriculum Rules Form (SOACURR).
- 2. Double-click the **Term** field to select a term and click **OK**.
- 3. Perform a **Next Block** function.
- 4. Enter and execute a query to find the program.
- 5. Access the Majors and Departments tab.
- 6. Navigate to the EDI and Self-Service block.
- 7. Click the drop-down arrow above the **EDI Degree** field to select a valid value to edit.

Note: This field defines the generic level of the degree program for which the applicant is applying, e.g., 2.4 equals Bachelors degree.

8. Click the drop-down arrow above the **EDI Level** field to select a valid value to edit.

Note: This field defines the EDI qualifier for the code set used for Field of Study Codes, which will be entered in the next field, e.g., 81 equals CIP codes.

9. Click the drop-down arrow above the **EDI Identification** field to update to a valid value.

Note: This field defines the subject matter of the intended field of study.

- 10. Check the **Display on Self Service** checkbox for all rules for which applications can be received via Banner Self-Service Admissions application processing.
- 11. Enter a description in the **Self-Service Description** field provide a description for all rules representing curricula that is displayed in Web Admissions applications.

Note: The description maintained is exactly what displays on the Web and also represents the total information from which the student can select.

Example: If the curriculum rule represents a Bachelor of Arts degree with a major in English, which is only valid on the Main Campus, you would want the description to be BA—English (Main Campus only).

- 12. Click the **Save** icon.
- 13. Click the **Exit** icon.

### Customizing curriculum rules by application type

The Web Application Customized Curriculum Form (SAAWCUR) allows institutions to select certain qualifying curricula to appear in the **Plan** drop-down menu for a particular application type.

When you enter the form with a valid application type in the Key block, the form returns all SORCMJR records whose level matches the level for the application type and that have nonnull values in SORCMJR\_DEGR\_CODE, SORCMJR\_EDI\_QLFR, and SORCMJR\_EDI\_VALUE. Once all valid records are displayed, you can choose which ones should be available for this application type by checking the **Restrict to Application** checkbox. As with SOACURR, a record must have the **Web Display** checkbox selected and the **Description** complete for the record to display on the Web.

Once all appropriate rules for this application type have had the **Restrict to Type** checkbox checked, the user can re-enter the form with the application type and can check the **Restricted** checkbox in the Key block. On performing a **Next Block** function, the form shows only those curricula that have been restricted to this application type.

### **Banner form**

🙀 Web Applicati	on Custom	ized Curr	iculum	SAAWCU	R 8.0 (UI	DCSysT) 🔀	********			********	***********	×≥ 20000000000 ≚ ×
Web Applicat	ion Type:	<u>QS</u> 🛡	Continu	uing Educ	ation/WF	D 🗆	Restricted	Effe	ective Term	200710	)	
Restrict to type Description:	From Term Term	To Term T	Level T	College	Degree T	Campus	Program Veb Displa	Curricul Rule T	um Major T	Department	Major EDI Fie Rule Degree	ld of Study Qualifier
Description:							Web Displa	) [ 1y: []	Auto Stude	ent:	Identification:	
Description:							Web Displa	) [ iy: []	Auto Stude	ent:	Identification:	
Description:							Web Displa	) [ 1y: []	Auto Stude	ent:	Identification:	
Description:							Web Displa	) [ 1y: []	Auto Stude	ent:	Identification:	
Description:							Web Displa	) [ iy: []	Auto Stude	ent:	Identification:	

### **Steps**

Follow these steps to customize curriculum rules by application type.

- 1. Access the Web Application Customized Curriculum Form (SAAWCUR).
- 2. Double-click the **Web Application Type** field in the Key block to view the List of Values, and select an application type.
- 3. Click the **Restricted** checkbox.
- 4. Perform a **Next Block** function.

Result: Curriculum that has been restricted to this application type displays.

5. Select the records you want to be available for this application type by checking the **Restrict to Type** checkbox.

Note: A record must have the **Web Display** checkbox checked and the **Description** complete for the record to display on the Web.

6. Click the **Save** icon.

7. Click the Exit icon.

### **Steps**

Follow these steps to review your work.

- 1. Access SAAWCUR.
- 2. Double-click the **Web Application Type** field to view the List of Values and select an application type.
- 3. Perform a **Next Block** function.
- 4. Review the application types.
- 5. Click the **Exit** icon.

# Self Check

### **Directions**

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

### **Question 1**

You cannot edit the Signature page that is delivered with Banner.

True or False

### **Question 2**

Which form do you use to define credit card processing rules?

### **Question 3**

What does *UPDATE ME* in the Value field of the Electronic Admissions Application Rules Form (SAAERUL) mean?

## **Answer Key for Self Check**

### **Directions**

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

### **Question 1**

You cannot edit the Signature page that is delivered with Banner.

False. You can customize the Signature page by application type using the Electronic Applicant Web Default Rules Form (SAAWADF).

### **Question 2**

Which form do you use to define credit card processing rules?

The Email and Credit Card Rules tab on the Electronic Applicant Web Default Rules Form (SAAWADF).

### **Question 3**

What does *UPDATE ME* in the Value field of the Electronic Admissions Application Rules Form (SAAERUL) mean?

If any of the Value fields contain UPDATE ME, the value must be updated to reflect the local option for Self-Service or EDI application processing to be used.

# Day-to-Day Operations

### **Section Goal**

The purpose of this section is to explain the day-to-day or operational procedures to review web submitted applications, resolve discrepancies, and move application data into permanent Banner tables.

### **Objectives**

In this section you will learn how to

- review submitted electronic applications
- reconcile "suspended" applications
- run verification steps for electronic applications
- override verification steps not satisfied
- "PUSH" verified applications into permanent Banner tables.

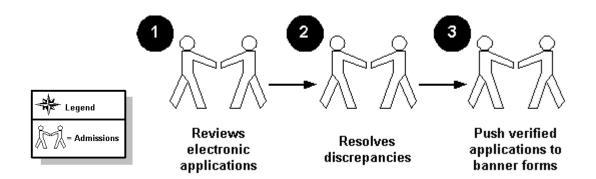
## **Process Introduction**

### About the process

This process outlines steps Admissions personnel would need to take on a day to day basis to review electronically submitted applications and move them into Banner forms.

### **Flow diagram**

This diagram highlights the processes used in Self-Service Admissions.



### What happens

The stages of the process are described in this table.

Stage	Description
1	Electronic application is submitted.
2	Matching process is run.
3	Suspended applications are reconciled.
4	Verification procedures are run.
5	If necessary verification procedures not completed are overridden.
6	Application data is "PUSH"ed to Banner forms.

#### **Overview**

To display the application(s) for a specific person, enter the electronic ID for that person in the Key block of the Electronic Application Process Form (SAAEAPS), or use a List function to display the Electronic Applicant Search Form (SOAEIDN), where you can search for an electronic applicant using name and ID. You also can select only those applications added on a certain date by entering the date in the **Add Date** field in the Key block. Only applications matching the **Web ID** field or **Add Date** field in the Key block display.

You can enter the main block and query on certain fields. Those fields are: Application Preference, Application Number, Application Type, Person Status and Application Status, Term, Source (with a value of Web), Add Date, Completion Indicator, Accepted Indicator, Process, and Process Date.

If you find applications that you believe are frivolous, they can be deleted using the **Record Remove** function. Once an application is deleted on SAAEAPS, its associated data is deleted from the electronic application holding tables; therefore, the application is no longer viewable on the Electronic Application Submitted Form (SAAETBL).

### **Banner form**

Web ID:	Record Type:	Add Date:
Electronic Applications	Verification Steps Review Results Change PIN	
Web ID Banner ID: Accepted Indicator: Street Line 1: E-mail Address:	Application Applic	Type Type Indicator Add Date: Process Date: Nation:
Banner ID: Accepted Indicator: Street Line 1: E-mail Address:	Term:  Source:    Process:     City:  State:    Person Status:    Application St	Add Date:
Banner ID: Accepted Indicator: Street Line 1: E-mail Address:	Term:     Source:       Process:        City:     State:       Person Status:     Application St	Add Date:

The Electronic Application Process Form (SAAEAPS)



Follow these steps to display received web applications.

- 1. Access the Electronic Application Process Form (SAAEAPS) to display received Web applications.
- 2. Select the electronic ID for an applicant in the **Web ID** field or use a List function to display the Electronic Applicant Search Form (SOAEIDN) where you can search for an electronic applicant using name and ID to display the application for a specific person.

Note: You also can select only those applications added on a certain date by entering the date in the **Add Date** field in the Key block. Only applications matching the **Web ID** field or **Add Date** field in the Key block display.

- 3. Perform a Next Block function—values for applicant self populate.
- 4. Review the information.
- 5. Click the **Exit** icon.

# Matching, Verifying, and Loading the Web Applications

### Introduction

Use the Elec Appl Verify/Load Process (SARETMT) to match, verify, and load the Web applications that meet your processing guidelines.

Parameters for SARETMT allow processing based on Application Type, Application Source, Application Term, and the Date Range of when applications were added.

SARETMT can be run in audit mode providing the user with the opportunity to review the match, verify, and load status of each application before it is actually processed. The **Status** field indicates whether the Web application is New, Matched, Suspended, or in Error based on the matching rules specified by the interface code on SOAINFR. If a Web application type has previously been pushed for a given Web ID, the **Status** field indicates N/A, as a matching PIDM already existed for the Web ID. The process indicates if verification errors occurred or if the application was pushed.

The user can run the match, verify, and load process in update mode. All electronic applications matching the input parameters are processed by SARETMT.

### Possible outcomes

Three possible outcomes can exist for each record processed by SARETMT.

- The record was matched, verified, and pushed successfully resulting in the creation of a SAAADMS application record.
- The record was placed into suspense or error status during the match process. Suspended records are not processed further by SARETMT until the match status has been resolved to either New or Matched. The user can resolve the suspended status using the Electronic Application Process Form (SAAEAPS). Records with a status equal to E will not load automatically as a required field indicated on the SOAINFR matching rules was empty on the Web application. These records also can be resolved to Match or New using SAAEAPS.
- The record failed the verification process. Numerous verification routines exist to ensure the integrity of the data being loaded into Banner. If certain errors occur during the verification process, the record is marked with a verification error.

### **Banner form**

rocess S rocess:		Parameter Set:
rinter rinter:	• Control           DATABASE <ul></ul>	Lines: 55 Submit Time:
arame lumber	eter Values Parameters 💌	Values ▼
01	Interface code w/match rules.	
02	Application Source	%
03	Application Type	%
04	Start Date Range	01-JAN-1990
05	End Date Range	31-DEC-2199
06	Term Code	%
07	Override App. Status Ind.	Y
08	Override App. Accept Ind.	Y
	4 TYPE: Character O/R: Required M/S: Single cerface Code that is associated with matching rules on GORCMRL. ssion Parameter Set as Name: Description:	

### **Steps**

Follow these steps to match, verify and load web applications.

- 1. Access the Elec Appl Verify/Load Process (SARETMT).
- 2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Parameter	Value
Interface Code w/match rules	Click on the <b>Values</b> icon to view the List of Values. Select a code.
Application Source	Click on the <b>Values</b> icon to view the List of Values. Select a source.

Parameter	Value
Application Type	Click on the <b>Values</b> icon to view the List of Values. Select a type.
Start Date Range	Enter a date in DD/MON/YYYY format.
End Date Range	Enter a date in DD/MON/YYYY format.
Term Code	Click on the <b>Values</b> icon to view the List of Values. Select a code.
Override App. Status Ind.	Enter $Y$ for yes or $N$ for no.
Override App. Accept Ind.	Enter $Y$ for yes or $N$ for no.
Use Gen. ID, SSN or Web ID	Enter one of the following:
	<i>G</i> —Generated ID <i>S</i> —SSN ID <i>E</i> —Web ID
Print Detail/Summary or Errors	Enter one of the following:
	<i>P</i> —Print <i>S</i> —Summary <i>E</i> —Errors
Audit or Update	Enter <i>A</i> for audit or <i>U</i> for update.
Create Recruit Records Y or N	Enter Y for yes or N for no.
Source code for Recruit Record	Enter the source (SBGI) code to be used for Recruit records (optional).

- 4. Click the **Save Parameter Set as** checkbox.
- 5. Enter a name and description in the **Name** and **Description** fields.
- 6. Click the **Submit** radio button.
- 7. Click the **Save** icon to run the process.

### Introduction

Resolve suspended electronic applications using the Electronic Application Process Form (SAAEAPS). If, after running SARETMT, the match status is set to suspended, the user accesses SAAEAPS to resolve the suspended record. This means that the institution decides if this person is new to Banner or if they match an existing Banner person.

### **Banner form**

Web ID:			Re	cord Type: 📃 🛛 Add	Date:	
ectronic Applications	Verification Steps	Review Results	Change PI	4		
Web ID	Applica	nt Name	Application Preference	Application Applicant Number Record Type	Application Type	Completion Indicator
Banner ID:		Term:		Source:	Add Date:	
Accepted Indicator:		Process:			Process Date:	
Street Line 1:		City:	State:	▼ Zipcode:	Nation:	
-mail Address:			Person Status:	Application Status:		
anner ID:		Term:		Source:	Add Date:	
ccepted Indicator:		Process:			Process Date:	
street Line 1:		City:	State:	Zipcode:	Nation:	
-mail Address:			Person Status:	Application Status:		
						_
anner ID:		Term:		Source:	Add Date:	
ccepted Indicator:		Process:			Process Date:	
treet Line 1:		City:	State:	Zipcode:	Nation:	
-mail Address:			Person Status:	Application Status:		

### **Steps**

Follow these steps to resolve suspended electronic applications.

- 1. Access the Electronic Application Process Form (SAAEAPS).
- 2. Click the **Web ID** search icon to display the Electronic Applicant Search Form (SOAEIDN).
- 3. Enter *N* in the **Record Type** field.

Note: These are the records that need to be resolved before they can be verified

and pushed into Banner.

- 4. Perform an **Execute Query** function.
- 5. Double-click on the desired Web ID to return to the Electronic Application Process Form (SAAEAPS).
- 6. Perform a **Next Block** function.
- 7. Select the **Verification Steps** tab.
- 8. Select *IDVR* (ID verification) in the **Step** field in the Manual Person Verification Steps block.
- 9. Select Associate Person with ID from the Options menu.
- 10. Click the Associate Person with an ID button.

Result: You are taken to the Common Matching Entry Form (GOAMTCH).

- 11. Enter a matching source in the **Matching Source** field, if necessary.
- 12. Enter data about the person in the Data Entry block and click the **Duplicate Check** button.

IF match is	THEN
found	click the <b>Select ID</b> button.
not found	create as new and save.

13. Access the Verification Steps block of SAAEAPS.

Result: The **Completion Indicator** checkbox and **Completion Date** field associated with the IDVR step is set.

14. Click the **Electronic Applications** tab.

Notes: The Person Status checkbox will be set to Y.

This record can now be reprocessed by SARETMT.

### Introduction

Resolve verification errors using the Electronic Application Process Form (SAAEAPS). If the AUTOOVERRIDE label on the Electronic Admissions Application Rules Form (SAAERUL) for which the group VCRL is set to *Y*, and the procedures and routines are marked as overrideable on SAAECRL, then SARETMT will not stop the process if verification errors occur (unless they are data errors).

If the AUTOOVERRIDE label is set to *N*, then any verification errors found while SARETMT is processing are identified, and the process halts. These errors can be viewed on SAAEAPS and must be resolved before the affected applications can be reprocessed by SARETMT. Verification errors can only be resolved on SAAEAPS if the routine or procedure causing the error has the **Override** checkbox checked on SAAECRL for the appropriate application type.

### **Banner form**

Web ID:	rocess SAAEAPS 8.0 (UDCSysT) 222222	Record Type: Add Date: 🕅
Electronic Applications	Verification Steps Review Result	is Change PIN
Web ID Banner ID: Accepted Indicator: Street Line 1: E-mail Address:	Applicant Name Term: Process: City:	Application       Application       Application       Completion         Preference       Number       Record Type       Type       Indicator         Source:       Add Date:       Process Date:       Process Date:       Process Date:       Process Date:         State:       Y Zipcode:       Nation:       Y
Banner ID: Accepted Indicator: Street Line 1: E-mail Address:	Term: Process: City:	Source: Add Date: Process Date: State: Zipcode: Nation: Person Status: Application Status: V
Banner ID: Accepted Indicator: Street Line 1: E-mail Address:	Term: Process: City:	Source: Add Date: Process Date: Process Date: Person Status: Application Status: T

### **Steps**

Follow these steps to resolve verification errors.

- 1. Access the Electronic Application Process Form (SAAEAPS).
- 2. Perform a **Next Block** function to navigate to the main block.
- 3. Query for the appropriate records (e.g., term, source) having a **Process** value of *E*.

Note: These are the records that need their verification errors resolved before they can be pushed into Banner.

4. Select **Review Results** from the **Options** menu or access the **Review Results** tab.

Result: In the System Verification Procedure block, each procedure is displayed, one procedure at a time. At the same time, each routine associated with a procedure is displayed in the System Verification Routines block.

- 5. Scroll through each procedure to find the procedures that have not been verified (i.e., the **Complete** checkbox is not checked).
- 6. Click the appropriate **Override Indicator** checkbox to resolve a procedure or routine.

Note: If you override an individual routine, only the verification associated with that routine is bypassed. If an entire procedure is overridden, none of the individual routines will have verification performed.

7. Return to the main block of SAAEAPS once all routines or procedures are overridden.

Note: You can manually re-verify the application here by selecting **Verify Application** from the **Options** menu, or you can re-run SARETMT.

8. Click the **Exit** icon.

## **Re-Running SARETMT in Update Mode**

### Introduction

Electronic Application Verify/Load Process (SARETMT) will try to verify all records that were previously suspended and will attempt to re-verify all applications that originally failed verification. All applications that pass the match and verification processing are pushed to Banner. Once an application has been pushed, the **Process Indicator** check box will be set to *P*(ushed).

### **Banner form**

rocess	Submission Controls GJAPCTL 8.0 (UDCSysT) 2000/00/00/00 s: SARETMT Flec. App. Verify/Load Process	Parameter Set:
<sup>o</sup> rinter Printer:	r Control : DATABASE Special Print:	Lines: 55 Submit Time:
<sup>D</sup> aram Number	neter Values r Parameters T	¥alues ▼
01	Interface code w/match rules.	
02	Application Source	%
03	Application Type	%
04	Start Date Range	01-JAN-1990
05	End Date Range	31-DEC-2199
06	Term Code	%
07	Override App. Status Ind.	Y
08	Override App. Accept Ind.	] Y
	: 4 TYPE: Character O/R: Required M/S: Single iterface Code that is associated with matching rules on GORCMRL ission	

### **Steps**

Follow these steps to complete the report on the Electronic Application Verify/Load Process.

- 1. Access the Elec Appl Verify/Load Process (SARETMT).
- 2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Parameter	Value
Interface Code w/match rules	Click on the <b>Values</b> icon to view the List of Values. Select a code.
Application Source	Click on the <b>Values</b> icon to view the List of Values. Select a source.

- 4. Perform a **Next Block** function.
- 5. Click the **Save** icon.
- 6. Click the **Exit** icon.

# Summary

### Let's review

As a result of completing this workbook, you have

- reviewed and created validation forms that control Admissions Self-Service
- created a Self-Service application
- defined rules for electronic verification
- reviewed submitted electronic applications
- executed all verification steps
- reconciled suspended applications and verification steps not completed
- "PUSH"ed electronic applications to Banner forms

Now you are ready to begin determining the information related to your Admissions Office which will be implemented within the Admissions Self-Service product module. Decisions will need to be made based upon your organization's needs as to which code validation forms and control and rules forms will be used as well as what your values will be on these forms.

# Self Check

### **Directions**

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

### **Question 1**

Applications that do not appear to have enough valid information can be deleted.

True or False

### **Question 2**

It is possible to view applications entered on a certain date by querying the 'Add Date' field.

True or False

### **Question 3**

If the status field displays 'N/A', then the application did not "push" properly.

True or False

### **Question 4**

Records with a status of 'E' require specific data to be present during the match process as defined in the rules on SOAINFR.

True or False

### **Question 5**

If after running the match process and a record is set to S, the record must be deleted as it will not process correctly.

True or False

### **Question 6**

It is possible to the system stop the SARETMT process if verification errors occur.

True or False

#### **Question 7**

Once overrides have been verified, the applications can be processed either manually or by re-running SARETMT.

True or False

### **Question 8**

Once all applications have been verified and "pushed" this creates a SAAADMS record in Banner.

True or False

### **Question 9**

Clients who are implementing Self-Service Admissions can create group codes on the SAAERUL form

True or False

### **Question 10**

Institutions can create customized applications allowing specific application types to be associated with specific curriculum programs.

True or False

### **Question 11**

It is not always necessary to associate name, address, and plan of study to application types on the SAAWAPP form.

True or False

### **Question 12**

Applications entered in native Banner via the SAAQUIK or SAAADMS forms can be viewed via the Self-Service Admissions Product on the web.

True or False

### **Answer Key for Self Check**

### **Question 1**

Applications that do not appear to have enough valid information can be deleted.

True

### **Question 2**

It is possible to view applications entered on a certain date by querying the 'Add Date' field.

True

### **Question 3**

If the status field displays 'N/A', then the application did not "push" properly.

False. 'N/A' indicates that the record matched on a previous "push" process with an existing PIDM within Banner.

### **Question 4**

Records with a status of 'E' require specific data to be present during the match process as defined in the rules on SOAINFR.

#### True

### **Question 5**

If after running the match process and a record is set to 'S', the record must be deleted as it will not process correctly.

False. The 'S' indicates that the record has been suspended and the match status must be resolved to either a New record or a Matched record.

### **Question 6**

It is possible to the system stop the SARETMT process if verification errors occur.

True

### **Question 7**

Once overrides have been verified, the applications can be processed either manually or by re-running SARETMT.

True

### **Question 8**

Once all applications have been verified and "pushed" this creates a SAAADMS record in Banner.

True

### **Question 9**

Clients who are implementing Self-Service Admissions can create group codes on the SAAERUL form

False. Group codes on SAAERUL are delivered by SunGard Higher Education and cannot be generated by clients.

### **Question 10**

Institutions can create customized applications allowing specific application types to be associated with specific curriculum programs.

True

### Question 11

It is not always necessary to associate name, address, and plan of study to application types on the SAAWAPP form.

False. When creating application types on SAAWAPP, name, address, and plan of study must be tied to application types.

### **Question 12**

Applications entered in native Banner via the SAAQUIK or SAAADMS forms can be viewed via the Self-Service Admissions Product on the web.

# False. Only applications created through the Self-Service Admissions product can be viewed on the web.

# **Appendix**

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	1			

### Forms Job Aid

Form	Full Name	Use this Form to
		create and maintain letter codes
GTVLETR	Letter Code Validation	
SAAECRL	Electronic Admissions Procedure/Routine Control	attach procedures and routines to each Electronic Application Type
SAAERUL	Electronic Admissions Application Rules	create and maintain the electronic admissions rules
SAAWAAD	Admissions Web Calendar Rules	determine by term, level, campus, college, and admit type when an application can be viewed (regardless of its source), when the status can be viewed, and when the most recent decision can be viewed on the Web
		customize the application signature page
SAAWADF	Electronic Web Applicant Default Rules	
SAAWADP	Web Application Customized List	define codes, by application type, that should display in the We menus for test codes, requested materials, interests, and credit card waiver reasons
		the sections and elements that make up each application type
SAAWAPP	Web Application Section Rules	· · · · · · · · · · · · · · · · · · ·
SAAWATR	Electronic Applicant Web Calendar Rules	define calendars for the application types that have different schedules
SAAWCUR	Web Application Customized Curriculum	select certain qualifying curricula to appear in the <b>Plan</b> drop- down menu for a particular application type
SAAWUDQ	Web User Defined Questions	define institution-specific questions that request information no found elsewhere in any application section
SOAATRM	Web Application Term Display Control	define the date ranges that you will receive applications for a term
SOACURR	Curriculum Rules	create and maintain the curriculum rules

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Form	Full Name	Use this Form to
		create and maintain HTML letter rules
SOAELTL	HTML Letter Rules	
		construct letter contents
SOAELTR	Format HTML Letter Rules	
		compare web application data with the existing student data in
SOAEQUI	Existing or Incoming Student Data Mapping	the system
		customize what values the applicant sees in the various drop-
SOAXREF	EDI Cross Reference Rules	down menus available on the Web application
		set up the applicant's outstanding checklist items for display
STVADMR	Admission Request Checklist Code	
	Validation	
		web-enable the application decisions code(s)
STVAPDC	Admissions Application Decision Code	
	Validation	
		create and maintain application status codes for web display
STVAPST	Admissions Application Status Code Validation	
		identify application codes and define the level, student type, and
STVWAPP	Application Type Code Validation	admission types associated with the code
		link an element code to a web section code
STVWSCF	Web Application Elements	
STVWSCT	Electronic Application Section Code Validation	define the procedure for each section code

### Terminology

### Push

The process of moving data from temporary tables into permanent tables.

### Matching

The process of comparing data from two separate sources and/or files to prevent duplicate records.

### WebTailor

An option in the Banner Self-Service Web application that allows you to customize how web pages are displayed on your institution's Self-Service website.