

Banner Student Self-Service Prospects Training Workbook

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Revision History Log

Publication Date	Summary
April 2008	New version that supports 8.0 software.
July 2008	Minor corrections

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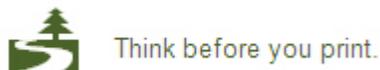


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Introduction



Course goal

This course is intended to familiarize you with Banner Self-Service for Prospects. Self-Service for Prospects functionality enables prospective students to submit information to your institution. Any prospective student interested in your institution can access the Self-Service for Prospects application. You will learn to identify primary functions offered in Banner Student and will follow the processes necessary to enter appropriate information into Banner via the Web.

The workbook is divided into these sections:

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

Course objectives

At the end of this course, you will be able to

- set up key forms, tables, and reports in Banner Self-Service for Prospects
- enter your Web interface code, Web prospect type code, and Web material code (required)
- identify the data entry sections to be displayed on the Web page (required)
- enter default recruiting data (optional)
- select Banner validation items to appear in the Web lists (optional)
- update source/background addresses and define rules
- write your acknowledgment letter (optional)

- build How I Learned About codes.
- match new prospect records to load to Banner permanent tables
- run the Electronic Match Process
- run the Migrate Electronic Prospects Process
- process individual record tape load
- purge prospect records from temporary tables.

Intended audience

Individuals from Recruiting Office and IT and the Web Master should also attend.

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 the rules and set the validation codes in Banner.

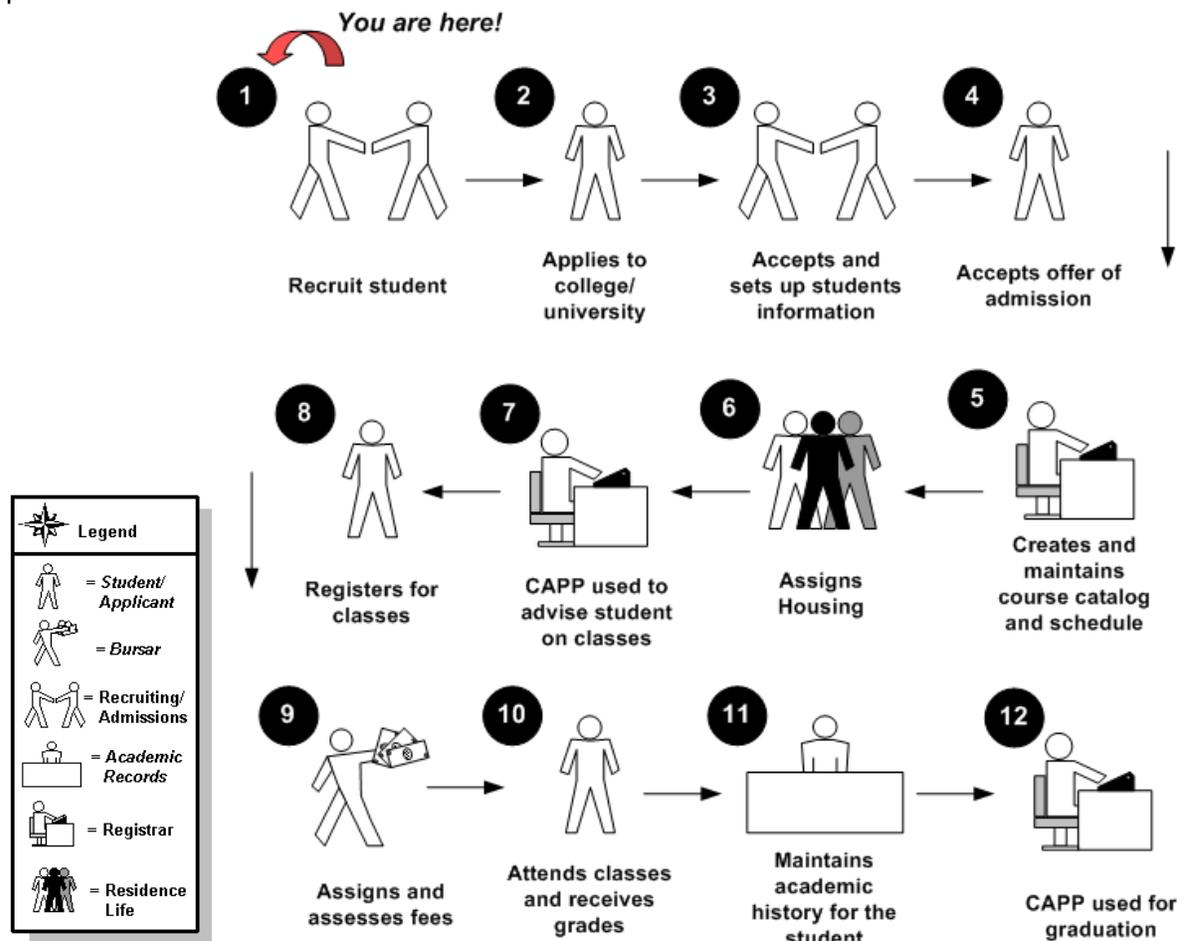
Process Introduction

About the process

A student interested in your institution can select Prospective Students from the Banner Self-Service Home Page. He or she will then be prompted to select a prospect type from a pull-down list. After the prospective student selects his or her prospect type, he or she is guided through the Prospect Data Entry page for the specified prospect type. The content and order of the data entry fields is determined by your institution when setting up Self-Service for Prospects. The prospective student enters the information on the Prospect Data Entry page and then clicks the **Submit Your Prospect** button. All the Self-Service for Prospects data is entered and validated on the Web.

Flow diagram

This diagram highlights where the Prospects process occurs within the overall Student process.



About the process

Rule and validation forms are set up on the Banner system. Unless a new code is required, this step is only performed once.

You can create a customized acknowledgement letter (optional).

The person/employee will view data in Self-Service for Prospect temporary tables, load selected prospect data (manual or batch load), and purge prospect records from temporary tables.

Set Up



Introduction

The purpose of this section is to outline the set-up process and detail the procedures to set-up your Banner system to enable prospective students to submit information to your institution via the web.

Objectives

At the end of this section, you will be able to

- set up key forms, tables, and reports in Banner Self-Service for Prospects
- enter your Web interface code, Web prospect type code, and Web material code (required)
- identify the data entry sections to be displayed on the Web page (required)
- enter default recruiting data (optional)
- select Banner validation items to appear in the Web lists (optional)
- update source/background addresses and define rules
- write your acknowledgment letter (optional)
- build How I Learned About codes.

Validation Tables and Rules Forms That Control Prospect Self-Service

Introduction

Existing Banner validation tables, forms and rules must be set up or created to accommodate Web.

Rule forms needed

These forms are used to set the rules and parameters in Banner for handling prospect data entry via the Web. Other validation forms may be utilized in Self-Service for Prospects.

Form Description	Banner Name
Electronic Prospect Validation	STVPREL
Web Prospect How I Learned About Validation	STVLEND
Web Prospect Information Validation	STVWPIC
Web Prospect Selection Rules	SRAWPRO
Web Acknowledgement Validation	STVWACK
Web for Prospects Acknowledgement Letter	SRAWACK
Interface Validation	STVINFC
Outside Interests Code Validation	STVINTS
Material Codes Validation	STVMATL
Web for Prospects Default Options (Optional)	SRAPRED
Web for Prospects Display Rules	SRAWPDS
Source/Background Institution Code Validation	STVSBGI
Source/Background Institution Base	SOASBGI
Electronic Application	SAAERUL

Electronic Prospect Validation

Introduction

Use the Electronic Prospect Validation Form (STVPREL) to define the various types of search or test score tapes that are to be loaded.

Banner form

Electronic Prospect Validation Form (STVPREL)

Prospect Code	Description	Interface Code	Tape Code	Enter on WEB	WEB Page ID	Activity Date
ACT	ACT Test Tape	ACT	ACT	<input type="checkbox"/>		29-NOV-2006
ACTS	Undergraduate (N.Z)	WEB		<input checked="" type="checkbox"/>		11-NOV-2007
ARCH	American History Program	WEB		<input type="checkbox"/>		13-MAR-2003
ARTSCI	Arts & Sciences Student			<input type="checkbox"/>		06-FEB-2003
AS	Associate Degree Program	WEB		<input checked="" type="checkbox"/>		09-JUL-2004
BA	Bachelor Degree Program	WEB		<input checked="" type="checkbox"/>		10-SEP-2007
BJ_AS	Associate Degree Inquiry (BJ)	WEB		<input type="checkbox"/>		13-OCT-2004
BJ_BA	Bachelor Degree Inquiry (BJ)	WEB		<input type="checkbox"/>		28-OCT-2004
CED	Continuing Education Student			<input type="checkbox"/>		04-DEC-2001
COMMERCE	College of Commerce Student			<input type="checkbox"/>		06-FEB-2003
EOS_ACT	ACT EOS Search Tape		EOS_ACT	<input type="checkbox"/>		08-FEB-2000
GMAT	GMAT Test Tape		GMAT	<input type="checkbox"/>		06-JUL-2000
GRE	GRE Test Tape		GRE	<input type="checkbox"/>		06-JUL-2000
INTL	International Student			<input type="checkbox"/>		04-DEC-2001
LAW	Law School Prospect	WEB		<input type="checkbox"/>		09-JUN-2004
MED	Medical School Supplemental	WEB		<input checked="" type="checkbox"/>		30-JUN-2006
MS	Master -Occupational Therapy	WEB		<input checked="" type="checkbox"/>		16-DEC-2004
PCU	Private College Search Tape		PCU	<input type="checkbox"/>		08-FEB-2000
PETERSON	Peterson Search Tape		PETERSON	<input type="checkbox"/>		08-FEB-2000
RESEARCH	Research Postgraduate	WEB		<input checked="" type="checkbox"/>		05-APR-2005
SAT	SAT Test Tape	SAT	SAT	<input type="checkbox"/>		18-SEP-2007
SSS_SEARCH	Search Tape		SSS_SEARCH	<input type="checkbox"/>		08-FEB-2000

Web Prospect How I Learned About Validation

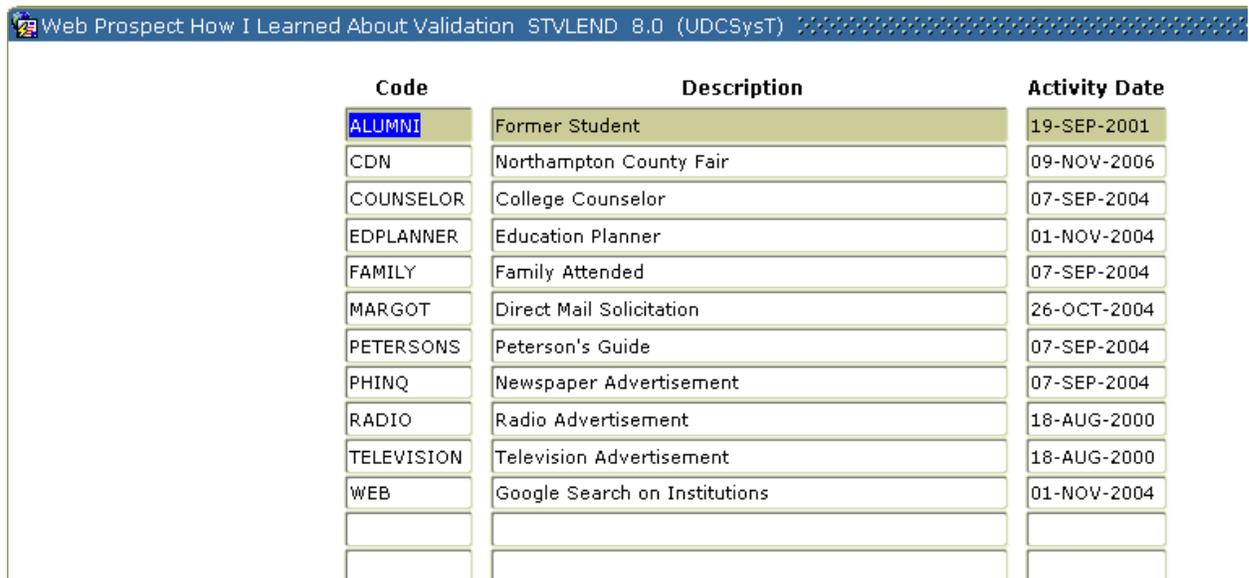
Introduction

Use the Web Prospect How I Learned About Validation Form (STVLEND) to build Web for Prospects How I Learned About codes to designate how the prospect learned about the school.

These codes are entered by prospects on the Web for Prospects Web entry forms. The data is migrated to the Banner production Recruiting module and is available on the Recruit Prospect Information Form (SRARECR).

Banner form

Web Prospect How I Learned About Validation Form (STVLEND)



The screenshot shows a web browser window with the title "Web Prospect How I Learned About Validation STVLEND 8.0 (UDCSysT)". The main content is a table with three columns: Code, Description, and Activity Date. The table contains 14 rows of data, with the first row highlighted in blue.

Code	Description	Activity Date
ALUMNI	Former Student	19-SEP-2001
CDN	Northampton County Fair	09-NOV-2006
COUNSELOR	College Counselor	07-SEP-2004
EDPLANNER	Education Planner	01-NOV-2004
FAMILY	Family Attended	07-SEP-2004
MARGOT	Direct Mail Solicitation	26-OCT-2004
PETERSONS	Peterson's Guide	07-SEP-2004
PHINQ	Newspaper Advertisement	07-SEP-2004
RADIO	Radio Advertisement	18-AUG-2000
TELEVISION	Television Advertisement	18-AUG-2000
WEB	Google Search on Institutions	01-NOV-2004

Web Prospect Information Validation

Introduction

Use the Web Prospect Information Selection Validation Form (STVWPIC) to build Web for Prospects information selection codes for Web data entry sections. The values delivered with Web for Prospects are system required.

These codes are entered on the Web for Prospects Selection Rules Form (SRAWPRO) to control order and data entry requirements for the Web for Prospects Web entry forms.

Banner form

Web Prospect Information Validation Form (STVWPIC)



Selection Code	Description	System Req	Activity Date
ADDRESS1	Primary Address	<input checked="" type="checkbox"/>	06-JUL-2000
ADDRESS2	Parent's Address	<input checked="" type="checkbox"/>	18-DEC-2002
BIRTHDATE	Prospect Birthdate	<input checked="" type="checkbox"/>	06-JUL-2000
CITIZENSH	Prospect Citizenship	<input checked="" type="checkbox"/>	06-JUL-2000
EMAIL	E-Mail Address	<input checked="" type="checkbox"/>	06-JUL-2000
ENTRYTERM	Prospect Entry Term	<input checked="" type="checkbox"/>	06-JUL-2000
ETHNICITY	Prospect Ethnicity/Race	<input checked="" type="checkbox"/>	06-JUL-2000
GENDER	Prospect Gender	<input checked="" type="checkbox"/>	06-JUL-2000
HIGHSCHOO	Prospect High School	<input checked="" type="checkbox"/>	06-JUL-2000
HOWILEARN	How Prospect Learned About Us	<input checked="" type="checkbox"/>	06-JUL-2000
INTERESTS	Prospect Interests	<input checked="" type="checkbox"/>	06-JUL-2000
INTERNATNL	Prospect International Info	<input checked="" type="checkbox"/>	06-JUL-2000
MAJOR	Prospect Major	<input checked="" type="checkbox"/>	06-JUL-2000
MATERIAL	Requested Material	<input checked="" type="checkbox"/>	30-MAY-2001
NAME	Prospect Name	<input checked="" type="checkbox"/>	06-JUL-2000
NTYPE	Prospect Name Type	<input checked="" type="checkbox"/>	06-JUL-2000
PRIORCOLL	Prospect Prior College	<input checked="" type="checkbox"/>	06-JUL-2000
SSNTINTFN	Prospect SSN/TIN/TFN	<input checked="" type="checkbox"/>	06-JUL-2000
STUDENTTYP	Prospect Student Type	<input checked="" type="checkbox"/>	06-JUL-2000
TELE	Telephone Number	<input type="checkbox"/>	30-AUG-2000
TELE3	Additional Telephone Numbers	<input checked="" type="checkbox"/>	06-JUL-2000
TESTSCORES	Prospect Test Scores	<input checked="" type="checkbox"/>	06-JUL-2000
VISA	Visa Information	<input checked="" type="checkbox"/>	14-OCT-2002

Web Prospect Selection Rules

Introduction

Use this form to identify the selections for display on the Web and the order in which they display.

Enter a code from STVPREL in the **Web Electronic Prospect Code** field in the key, and use Next Block to see the selection codes used with the prospect code. The prospect codes on STVPREL must have the **Enter on WEB** checkbox checked in order to be displayed in the list of values for the **Web Electronic Prospect Code** field on SRAWPRO.

Banner form

Web Prospect Selection Rules Form (SRAWPRO)

Web for Prospects Selection Rules SRAWPRO 8.0 (UDCSysT)

Web Electronic Prospect Code: ▼

Selection Code	Address Code	E-mail Type	Display Order on Web	Response Required on Web	Activity Date
<input type="text"/> ▼	<input type="text"/> ▼	<input type="text"/> ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Web Acknowledgement Validation

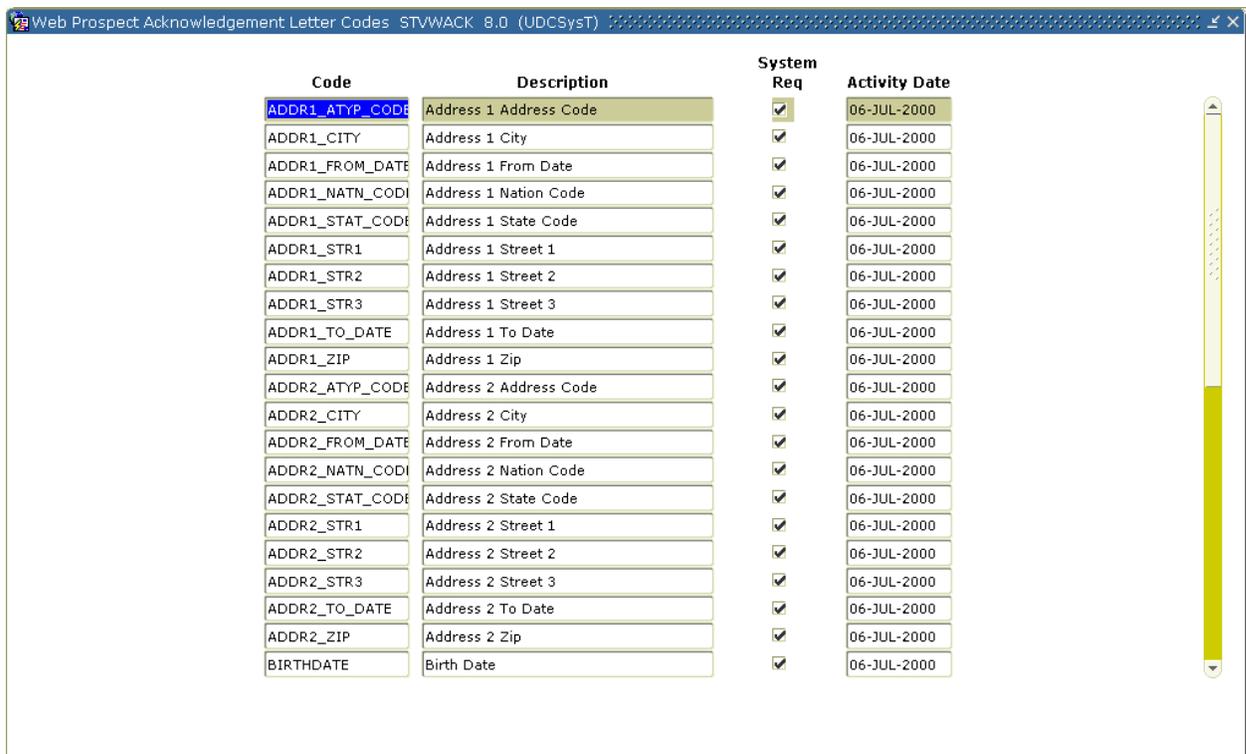
Introduction

Use the Web Acknowledgement Validation Form (STVWACK) to build Web for Prospects acknowledgement codes for data elements from the Electronic Prospect System. The values delivered with Web for Prospects are system required.

These codes are used on the Web for Prospects Acknowledgement Letter Form (SRAWACK) for placing Electronic Prospect data elements on the Web acknowledgment letter. The acknowledgment letter appears on the Web after the prospect presses the **Submit** button.

Banner form

Web Acknowledgement Validation Form (STVWACK)



Code	Description	System Req	Activity Date
ADDR1_ATYP_CODE	Address 1 Address Code	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_CITY	Address 1 City	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_FROM_DATE	Address 1 From Date	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_NATN_CODE	Address 1 Nation Code	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_STAT_CODE	Address 1 State Code	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_STR1	Address 1 Street 1	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_STR2	Address 1 Street 2	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_STR3	Address 1 Street 3	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_TO_DATE	Address 1 To Date	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR1_ZIP	Address 1 Zip	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_ATYP_CODE	Address 2 Address Code	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_CITY	Address 2 City	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_FROM_DATE	Address 2 From Date	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_NATN_CODE	Address 2 Nation Code	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_STAT_CODE	Address 2 State Code	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_STR1	Address 2 Street 1	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_STR2	Address 2 Street 2	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_STR3	Address 2 Street 3	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_TO_DATE	Address 2 To Date	<input checked="" type="checkbox"/>	06-JUL-2000
ADDR2_ZIP	Address 2 Zip	<input checked="" type="checkbox"/>	06-JUL-2000
BIRTHDATE	Birth Date	<input checked="" type="checkbox"/>	06-JUL-2000

Web for Prospects Acknowledgement Letter

Introduction

Use this form to customize the acknowledgement letter. The acknowledgement letter will appear on the Web page after the student presses the **Submit** button.

Enter a code from STVPREL in the **Web Electronic Prospect Code** field in the key, and use Next Block to see the sequence numbers and variables for the letter. The prospect codes on STVPREL must have the **Enter on WEB** checkbox checked in order to be displayed in the list of values for the **Web Electronic Prospect Code** field on SRAWACK.

Banner form

Web for Prospects Acknowledgement Letter Form (SRAWACK)

The screenshot shows a web browser window titled "Web for Prospects Acknowledgement Letter SRAWACK 8.0 (UDCSysT)". At the top, there is a "Web Electronic Prospect Code:" label followed by a dropdown menu. Below this is a table with five columns: "Sequence", "Formatting", "Prospect Data", "Text", and "Activity Date". Each column contains a series of input fields. The "Sequence" column has a "Re-sequence and Save" button with a clock icon. The "Formatting" column has dropdown menus. The "Prospect Data" column has a dropdown menu. The "Text" column has a text input field with a pencil icon. The "Activity Date" column has a date input field. A vertical scrollbar is visible on the right side of the table.

Interface Validation

Introduction

Use the Interface Validation Form (STVINFC) to create, update, insert, and delete interface codes, such as ACT, Financial Aid CSS tape, or GRE, and so on. It is also used to assign a matching source code to the interface code in order to define the matching rules to be used with that interface code.

This form is used by the Electronic Prospect Validation Form (STVPREL) to validate the interface code with the matching source codes from the Common Matching Source Code Validation Form (GTVCMSC). You can create or update these codes only from this form.

Note: For common matching processing, interface codes must be entered on STVINFC prior to entering information on the Common Matching Rules Form (GORCMRL). GORCMRL is used to set up the matching rules associated with the matching source codes.

Banner form

Interface Validation Form (STVINFC)

Interface Code	Description	Test Source	Source Code	Contact Type	Common Matching Source	Activity Date	
ACT	ACT	TAPE	A00005	TAP	WEB_PROSPEC	Web Prospect Matching Rules	29-NOV-2006
AMCS	AMCAS Tape Types						22-NOV-2005
FACT	Financial Aid ACT Tape Load	TAPE	A00005	TAP			07-APR-1988
FCSS	Financial Aid CSS Tape	TAPE	A00005	TAP			07-APR-1988
FGAP	GAPSFAS Financial Aid Tape	TAPE	A00005	TAP			07-APR-1988
FPEL	PELL Financial Aid Tape	TAPE	A00005	TAP			07-APR-1988
GRE	GRE	TAPE	A00005	TAP			13-OCT-1987
SAT	SAT	TAPE	A00005	TST	REC_ADM	Recruiting and Admissions	07-JUL-2005
WAPP	Web Applicant Load	STDN	WEB	WEB	REC_ADM	Recruiting and Admissions	03-MAR-2005
WEB	Web Prospect Load	STDN	WEB	WEB	REC_ADM	Recruiting and Admissions	07-MAR-2007

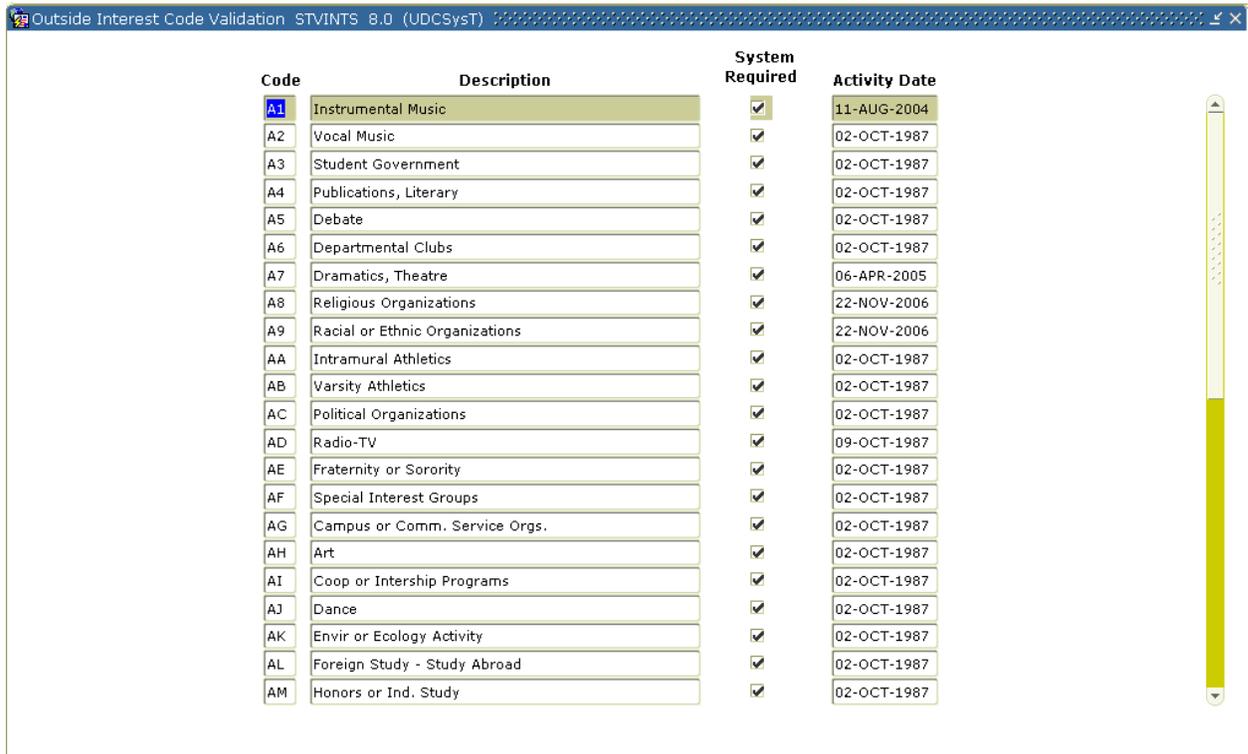
Outside Interests Code Validation

Introduction

Use the Outside Interest Code Validation Form (STVINTS) to create, update, insert, and delete codes representing outside interests, such as Vocal Music, Debate, Varsity Athletics, and so on. This form is used by the Prospect Information Form (SRARECR) and the Admissions Application Form (SAAADMS) to validate these codes. You can create and update these codes only from this form.

Banner form

Outside Interests Code Validation Form (STVINTS)



The screenshot shows a window titled "Outside Interest Code Validation STVINTS 8.0 (UDCSysT)". The window contains a table with the following columns: Code, Description, System Required, and Activity Date. The table lists various codes and their corresponding descriptions, with checkboxes in the System Required column and dates in the Activity Date column.

Code	Description	System Required	Activity Date
A1	Instrumental Music	<input checked="" type="checkbox"/>	11-AUG-2004
A2	Vocal Music	<input checked="" type="checkbox"/>	02-OCT-1987
A3	Student Government	<input checked="" type="checkbox"/>	02-OCT-1987
A4	Publications, Literary	<input checked="" type="checkbox"/>	02-OCT-1987
A5	Debate	<input checked="" type="checkbox"/>	02-OCT-1987
A6	Departmental Clubs	<input checked="" type="checkbox"/>	02-OCT-1987
A7	Dramatics, Theatre	<input checked="" type="checkbox"/>	06-APR-2005
A8	Religious Organizations	<input checked="" type="checkbox"/>	22-NOV-2006
A9	Racial or Ethnic Organizations	<input checked="" type="checkbox"/>	22-NOV-2006
AA	Intramural Athletics	<input checked="" type="checkbox"/>	02-OCT-1987
AB	Varsity Athletics	<input checked="" type="checkbox"/>	02-OCT-1987
AC	Political Organizations	<input checked="" type="checkbox"/>	02-OCT-1987
AD	Radio-TV	<input checked="" type="checkbox"/>	09-OCT-1987
AE	Fraternity or Sorority	<input checked="" type="checkbox"/>	02-OCT-1987
AF	Special Interest Groups	<input checked="" type="checkbox"/>	02-OCT-1987
AG	Campus or Comm. Service Orgs.	<input checked="" type="checkbox"/>	02-OCT-1987
AH	Art	<input checked="" type="checkbox"/>	02-OCT-1987
AI	Coop or Internship Programs	<input checked="" type="checkbox"/>	02-OCT-1987
AJ	Dance	<input checked="" type="checkbox"/>	02-OCT-1987
AK	Envir or Ecology Activity	<input checked="" type="checkbox"/>	02-OCT-1987
AL	Foreign Study - Study Abroad	<input checked="" type="checkbox"/>	02-OCT-1987
AM	Honors or Ind. Study	<input checked="" type="checkbox"/>	02-OCT-1987

Material Codes Validation

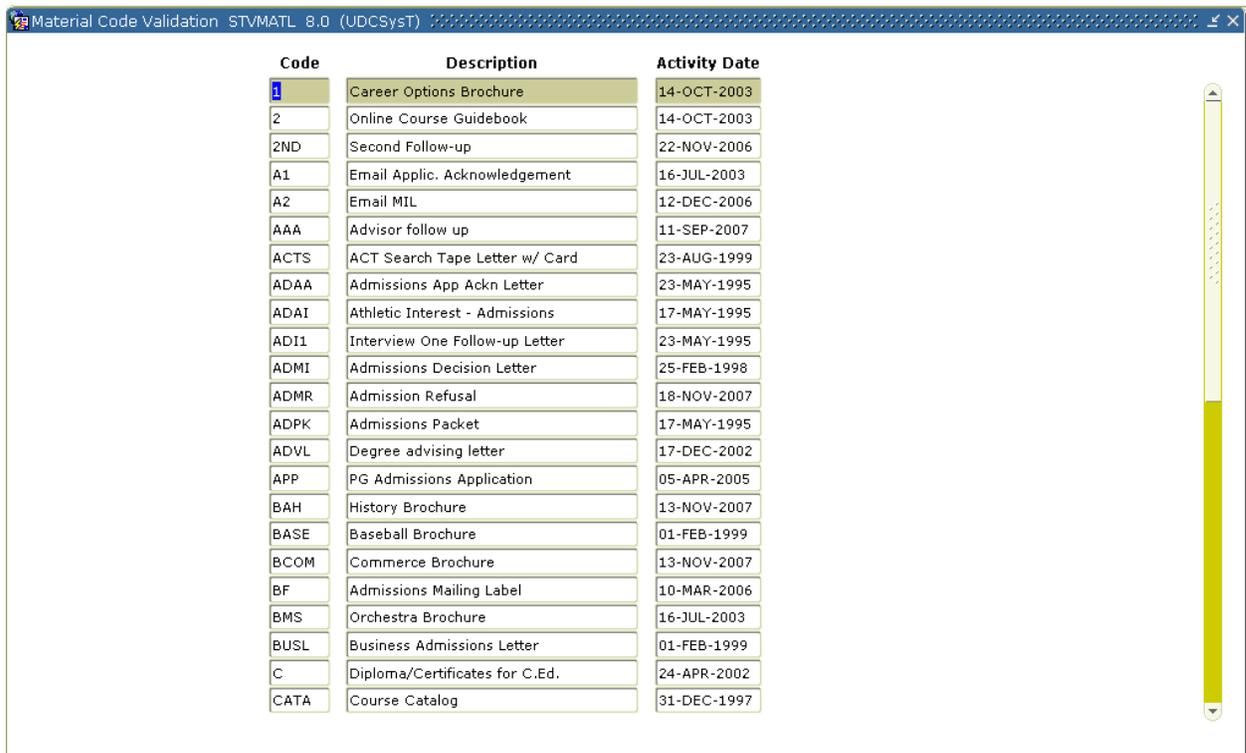
Introduction

Use the Material Code Validation Form (STVMATL) to create, update, insert, and delete material codes for use in communication plans and letter generation, such as President Greeting Letter, Campus Brochure, Course Schedule, and so on. Forms related to communication plans and letter generation use this form to validate the material codes. You can create and update these codes only from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Material Codes Validation Form (STVMATL)



The screenshot shows a web browser window titled "Material Code Validation STVMATL 8.0 (UDCSysT)". The main content is a table with three columns: Code, Description, and Activity Date. The table lists various material codes and their corresponding descriptions and activity dates. The first row is highlighted in green.

Code	Description	Activity Date
1	Career Options Brochure	14-OCT-2003
2	Online Course Guidebook	14-OCT-2003
2ND	Second Follow-up	22-NOV-2006
A1	Email Applic. Acknowledgement	16-JUL-2003
A2	Email MIL	12-DEC-2006
AAA	Advisor follow up	11-SEP-2007
ACTS	ACT Search Tape Letter w/ Card	23-AUG-1999
ADAA	Admissions App Ackn Letter	23-MAY-1995
ADAI	Athletic Interest - Admissions	17-MAY-1995
ADI1	Interview One Follow-up Letter	23-MAY-1995
ADMI	Admissions Decision Letter	25-FEB-1998
ADMR	Admission Refusal	18-NOV-2007
ADPK	Admissions Packet	17-MAY-1995
ADVL	Degree advising letter	17-DEC-2002
APP	PG Admissions Application	05-APR-2005
BAH	History Brochure	13-NOV-2007
BASE	Baseball Brochure	01-FEB-1999
BCOM	Commerce Brochure	13-NOV-2007
BF	Admissions Mailing Label	10-MAR-2006
BMS	Orchestra Brochure	16-JUL-2003
BUSL	Business Admissions Letter	01-FEB-1999
C	Diploma/Certificates for C.Ed.	24-APR-2002
CATA	Course Catalog	31-DEC-1997

Web for Prospects Default Options

Introduction

Use this form to enter the default recruit values for Web-entered data. You can designate default values that can be used to populate the recruiting record (SRBRECR) or applicant record (SARADAP) when a record is created via the Migrate Electronic Prospects Process (SRRPREL) or by using the Create Recruit/Applicant item in the Options Menu on the Electronic Prospect Inquiry Form (SRIPREL). This form is also used in the tape load process.

Banner form

Web for Prospects Default Options Form (SRAPRED)

The screenshot shows a web browser window titled "Electronic Prospects Default Options SRAPRED 8.0 (UDCSysT)". At the top, there is a field for "Electronic Prospect Code:" with a dropdown arrow and a "Clear Defaults" button with a trash icon. The main content area is divided into two sections: "General Default Values" and "Curriculum Default Values".

General Default Values:

Level:	<input type="text"/>	Recruit Source:	<input type="text"/>
Recruiting Term:	<input type="text"/>	Contact:	<input type="text"/>
Recruiter:	<input type="text"/>	Student Type:	<input type="text"/>
Test Source:	<input type="text"/>	Recruit Type:	<input type="text"/>
Education Goal:	<input type="text"/>	Admit Type:	<input type="text"/>
Visa Type:	<input type="text"/>	Recruit Status:	<input type="text"/>

Curriculum Default Values:

Catalog Term:	<input type="text"/>
College:	<input type="text"/>
Campus:	<input type="text"/>
Program:	<input type="text"/>
Degree:	<input type="text"/>
Major:	<input type="text"/>
Department:	<input type="text"/>

Web for Prospects Display Rules

Introduction

Use this form to reduce the number of choices the student can select from or to change the descriptions that will display on the Web.

This is accomplished by customizing the pulldown lists with specific values from Banner validation tables. All list boxes in the Web for Prospects Web pages are populated from Banner validation tables.

Banner form

Web for Prospects Display Rules Form (SRAWPDS)

The screenshot shows a web browser window titled "Web for Prospects Display Rules SRAWPDS 8.0 (UDCSysT)". The form contains the following elements:

- Web Electronic Prospect Code:** A text input field followed by a dropdown arrow.
- Validation Table Name:** A text input field.
- Table:** A table with four columns: "Table Name", "Code Value", "Description", and "Activity Date". Each column contains a vertical stack of 15 empty input boxes. The "Code Value" column has a dropdown arrow above the first box. The "Activity Date" column has a vertical scrollbar on its right side.

Source/Background Institution Code Validation

Introduction

Use the Source/Background Institution Code Validation Form (STVSBGI) to create, update, insert, and delete source/background institution codes, such as Sungard University, Hard Knocks College, and so on. Several forms in the Recruiting, Academic History, and Admissions modules use this form to validate the source/background institution codes. You can create and update these codes only from this form.

Banner form

Source/Background Institution Code Validation Form (STVSBGI)

The screenshot displays a web browser window titled "Source/Background Institution Code Validation STVSBGI 8.0 (UDCSysT)". The main content is a table with the following columns: "Source or Background Institution", "Description", "Type", "Source Indicator", "Admissions Request", "Electronic FICE", and "Voice Response Message Number". The "Source Indicator" column contains a series of checkboxes, with the first one checked. The "Admissions Request" column contains a dropdown menu with a downward arrow. The table has 20 rows, and a vertical scrollbar is visible on the right side.

Source or Background Institution	Description	Type	Source Indicator	Admissions Request	Electronic FICE	Voice Response Message Number
			<input checked="" type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
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			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			

Source/Background Institution Base

Introduction

The Source or Background Institution Base Form is used to capture general information, such as address, comments, and contacts, about a source or background institution. Most of the information captured is not validated to allow for flexibility.

The address information provided on this form is displayed in Academic History and Admissions. The codes on the Source/ Background Institution Validation Form (STVSBGI) must be established first. The validation form indicates the type of entity (high school or college) and whether the entity is a source for the institution.

When a valid ZIP or postal code is selected from the ZIP/Postal Code Validation Form (GTVZIPC) and entered in the **ZIP or Postal Code** field, the combination of City, State/Province, and Nation information which exists in GTVZIPC will default into the appropriate fields. The related information does not default in when the ZIP/Postal Code is entered manually.

Banner form

Source/Background Institution Base Form (SOASBGI)

Source/Background Institution Base SOASBGI 8.0 (UDCSysT)

Source or Background Institution: ▼

Source or Background Institution Address

Street Line 1:

Street Line 2:

Street Line 3:

City:

State or Province: ▼ County: ▼

ZIP or Postal Code: ▼ Nation: ▼

Institution Contacts

Contact Person: Phone Number:

Person Type: ▼ Area Code: Number:

Extension:

Comments, Directions and Text

 Comments

Electronic Application

Introduction

This form is used to define the rules which are used when processing electronic applications, electronic prospects, and tapeloads. Rows for this table are not intended to be added locally. Rules which will be used in system processing will be delivered by SunGard Higher Education, and users will only need to update the **(Rule) Value** to reflect local processing options if it contains *UPDATE ME*.

Rules fall into three major categories:

- Rules which control processing within self-service admissions, self-service prospects, or tapeload processing.

For example, there is a rule which specifies the number of outside interest slots which will display in Web applications.

- Rules which specify default values for various data elements. These kinds of rules can apply to both Web and EDI applications.
- Rules which govern how data will be loaded into the permanent Banner tables.

For example, there is a set of rules which specifies whether application records will be created if one already exists for the person, term, level, major, or overall curriculum chosen.

Entering Electronic Prospect Codes

Banner form

The Electronic Prospect Validation Form (STVPREL) (required) is used to enter the electronic prospect type codes. The **Enter on WEB** and **WEB Page ID** fields are used to support Self-Service for Prospects.

The prospect codes that do not have the **Enter on WEB** checkbox checked cannot be entered on the Web. The **WEB Page ID** field (optional) is used for grouping prospects on a Web page. For example, if your institution has several undergraduate programs, you may have different default values and require that different data be entered. Therefore, you would create separate prospect codes. You can key the selection of your undergraduate programs off one site by constructing a link using the WEB Page ID value.

Prospect Code	Description	Interface Code	Tape Code	Enter on WEB	WEB Page ID	Activity Date
ACT	ACT Test Tape	ACT	ACT	<input type="checkbox"/>		29-NOV-2006
ACTS	Undergraduate (N.Z)	WEB		<input checked="" type="checkbox"/>		11-NOV-2007
ARCH	American History Program	WEB		<input type="checkbox"/>		13-MAR-2003
ARTSCI	Arts & Sciences Student			<input type="checkbox"/>		06-FEB-2003
AS	Associate Degree Program	WEB		<input checked="" type="checkbox"/>		09-JUL-2004
BA	Bachelor Degree Program	WEB		<input checked="" type="checkbox"/>		10-SEP-2007
BJ_AS	Associate Degree Inquiry (BJ)	WEB		<input type="checkbox"/>		13-OCT-2004
BJ_BA	Bachelor Degree Inquiry (BJ)	WEB		<input type="checkbox"/>		28-OCT-2004
CED	Continuing Education Student			<input type="checkbox"/>		04-DEC-2001
COMMERCE	College of Commerce Student			<input type="checkbox"/>		06-FEB-2003
EOS_ACT	ACT EOS Search Tape		EOS_ACT	<input type="checkbox"/>		08-FEB-2000
GMAT	GMAT Test Tape		GMAT	<input type="checkbox"/>		06-JUL-2000
GRE	GRE Test Tape		GRE	<input type="checkbox"/>		06-JUL-2000
INTL	International Student			<input type="checkbox"/>		04-DEC-2001
LAW	Law School Prospect	WEB		<input type="checkbox"/>		09-JUN-2004
MED	Medical School Supplemental	WEB		<input checked="" type="checkbox"/>		30-JUN-2006
MS	Master -Occupational Therapy	WEB		<input checked="" type="checkbox"/>		16-DEC-2004
PCU	Private College Search Tape		PCU	<input type="checkbox"/>		08-FEB-2000
PETERSON	Peterson Search Tape		PETERSON	<input type="checkbox"/>		08-FEB-2000
RESEARCH	Research Postgraduate	WEB		<input checked="" type="checkbox"/>		05-APR-2005
SAT	SAT Test Tape	SAT	SAT	<input type="checkbox"/>		18-SEP-2007
SSS_SEARCH	Search Tape		SSS_SEARCH	<input type="checkbox"/>		08-FEB-2000

Procedure

The **WEB Page ID** field can be used to group related prospect codes. When the same WEB Page ID is used for different prospect codes, the Choose Prospect Type page can be displayed with only the set of grouped values. Using this feature, institutions can define different links to Self-Service for Prospects for different categories of students. For example, one URL could be titled Undergraduate Prospective Students and point to a group of PREL (Prospect Type) codes where the WEB Page ID is UG. A different URL could be titled Graduate Prospective Students and point to a group of PREL codes where the WEB Page ID is GR.

The **Interface code** field is used to specify the matching rules that are applied when the Electronic Prospect Matching Process (SRRSRIN) is used to match electronic prospects to Production Banner data. Different matching rules can be used for different prospect types, if desired.

Follow these steps to enter electronic prospect codes.

1. In Banner, Access the Electronic Prospect Validation Form (STVPREL).
2. Perform an Insert Record function.
3. Enter the following information to define a Prospect Type.

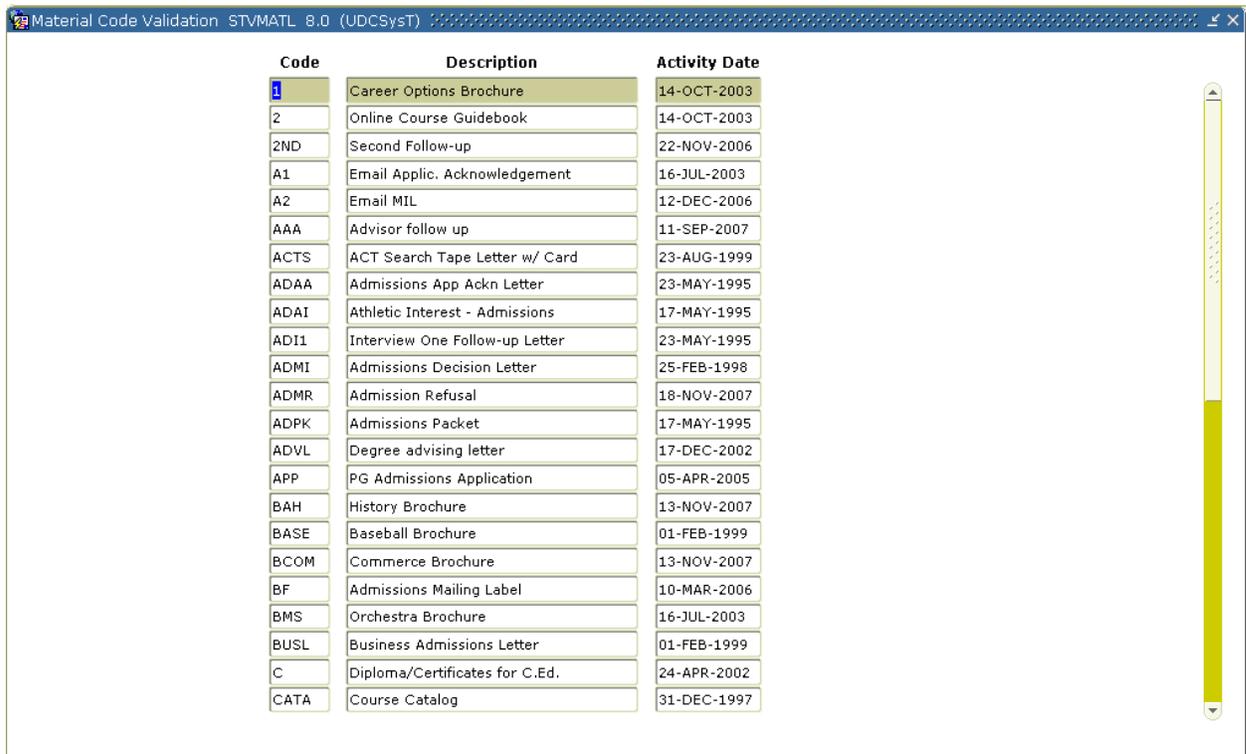
Field	Value
Prospect Code	WEB
Description	Prospect Self-Service
Interface	WEB
Tape Code (optional)	Leave empty
Enter on WEB check box (required)	Check—The prospect codes that do not have the Enter on WEB checkbox checked cannot be entered on the Web.
WEB Page ID (optional)	Leave empty
Activity Date	Default

4. Click the **Save** icon.
5. Click the **Exit** icon.

Banner form

You use Material Code Validation Form (STVMATL) to create, update, insert, and delete material codes for use in communication plans and letter generation (e.g., President Greeting Letter, Campus Brochure, Course Schedule). Forms related to communication plans and letter generation use this form to validate the material codes. You can only create and update these codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.



The screenshot shows a web browser window titled "Material Code Validation STVMATL 8.0 (UDCSysT)". The window contains a table with three columns: "Code", "Description", and "Activity Date". The table lists various material codes and their corresponding descriptions and activity dates. The first row is highlighted in green.

Code	Description	Activity Date
1	Career Options Brochure	14-OCT-2003
2	Online Course Guidebook	14-OCT-2003
ZND	Second Follow-up	22-NOV-2006
A1	Email Applic. Acknowledgement	16-JUL-2003
A2	Email MIL	12-DEC-2006
AAA	Advisor follow up	11-SEP-2007
ACTS	ACT Search Tape Letter w/ Card	23-AUG-1999
ADAA	Admissions App Ackn Letter	23-MAY-1995
ADAI	Athletic Interest - Admissions	17-MAY-1995
ADI1	Interview One Follow-up Letter	23-MAY-1995
ADMI	Admissions Decision Letter	25-FEB-1998
ADMR	Admission Refusal	18-NOV-2007
ADPK	Admissions Packet	17-MAY-1995
ADV1	Degree advising letter	17-DEC-2002
APP	PG Admissions Application	05-APR-2005
BAH	History Brochure	13-NOV-2007
BASE	Baseball Brochure	01-FEB-1999
BCOM	Commerce Brochure	13-NOV-2007
BF	Admissions Mailing Label	10-MAR-2006
BMS	Orchestra Brochure	16-JUL-2003
BUSL	Business Admissions Letter	01-FEB-1999
C	Diploma/Certificates for C.Ed.	24-APR-2002
CATA	Course Catalog	31-DEC-1997

Steps

Follow these steps to enter materials.

1. Access the Material Code Validation Form (STVMATL).
2. Perform an **Insert Record** function.
3. In the **Code** field, enter **ADPK**
4. In the **Description** field, enter **Admissions Packet**

Note: The Activity Date field defaults.

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

Steps

Follow these steps to build rules for your materials.

1. In Banner, Access the Material Form (SOAMATL) to build rules for your material code.
2. Enter **ADPK** in the **Material** field.
3. Navigate to the **Next Block**.
4. In the **Published/Generated** field enter *P* to indicate published.

Note: **Duplicate Material Rule** field is used to attach rules regarding whether a material can be sent multiple times.

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

Identify Data Entry Sections for Display

Banner form

The Self-Service for Prospects Selection Rules Form (SRAWPRO) is used to identify the selections for display on the Web and the order in which they are displayed.

Selection Code	Address Code	E-mail Type	Display Order on Web	Response Required on Web	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Procedure

Follow these steps to identify the data entry sections to be displayed on the Web page on the Web for Prospects Selection Rules Form (SRAWPRO).

1. Access the Web for Prospects Selection Rules Form (SRAWPRO).
2. Double-click on the **Web Electronic Prospect Code** field to view the List of Values.

Note: The prospect codes on STVPREL must have the **Enter on the Web** checkbox checked to display in the List of Values on the **Web Electronic Prospect Code**

3. Select **Web** from the List of Values, then click **OK**
4. Perform a **Next Block** function to view the selection codes used with the prospect code.

Note: The values in the **Selection Code** field are created on the Web Prospect Information Selection Validation Form (STVWPIC) and are system required. Each selection is equated to data elements in the Self-Service for Prospects module of the Banner Self-Service for Student product.

5. Double-click on the **Address Code** and **Email Type** fields to view the List of

Values.

6. Select values. These values are required for the selection codes **Address1**, **Address2**, and **E-mail**.

Note: The Display Order on Web field is used to designate the order of the modules on the Web page that fit your requirements.

7. Click the **Response Required on Web** checkbox to force the prospect to enter data on the Web page.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Note: When you first enter this form with a new prospect code from STVPREL, the selection codes for **Name** and **Address1** will automatically default. If you have not entered any selection codes on this form for a prospect code from STVPREL, the prospect code will not be available on any Web page in Self-Service for Prospects.

Entering Default Recruiting Data

Banner form

Use the Web for Prospect Default Options Form (SRAPRED) to define default recruit values for Web entered data. The term, level, major, and degree are required in the Banner Recruiting module. If you do not enter values on SRAPRED and this data is not entered on the Web, the Banner system defaults are used for the Recruit record. If you enter any data on this form, you must enter a value for the level code.

The screenshot shows a web browser window titled "Electronic Prospects Default Options SRAPRED 8.0 (UDCSysT)". At the top, there is a field for "Electronic Prospect Code:" with a dropdown arrow and a "Clear Defaults" button with a trash icon. Below this is a large box containing two sections of default values:

- General Default Values:**
 - Level: [] [v]
 - Recruiting Term: [] [v]
 - Recruiter: [] [v]
 - Test Source: [] [v]
 - Education Goal: [] [v]
 - Visa Type: [] [v]
 - Recruit Source: [] [v]
 - Contact: [] [v]
 - Student Type: [] [v]
 - Recruit Type: [] [v]
 - Admit Type: [] [v]
 - Recruit Status: [] [v]
- Curriculum Default Values:**
 - Catalog Term: [] [v]
 - College: [] [v]
 - Campus: [] [v]
 - Program: [] [v]
 - Degree: [] [v]
 - Major: [] [v]
 - Department: [] [v]

Procedure

Follow these steps to enter default recruiting data.

1. Access the Web for Prospect Default Options Form (SRAPRED).
2. Double-click the **Electronic Prospect Code** field in the key block to view the List of Values.
3. Select **Web** and click **OK**.
4. Perform a **Next Block** function.

5. In the **Level**, **Recruiting Term**, **Major**, and **Degree** fields, enter values.

Note: All other fields are optional; add values as needed. The **Clear Defaults** icon (in the key block) is used to remove the existing values so new ones can be entered for the code.

6. Click the **Save** icon.

7. Click the **Exit** icon.

Note: The prospect codes on STVPREL must have the **Enter on WEB** check box checked to display in the List of Values for the **Electronic Prospect Code** field on SRAPRED.

Selecting Banner Validation Values

Banner form

Select Banner validation items to appear in the Web lists on the Web for Prospects Display Rules Form (SRAWPDS). This is an optional form.

Define the data that is to be displayed in the drop-down menus in Self-Service for Prospects. All list boxes displayed in Self-Service for Prospects are from Banner validation tables. This form allows you to reduce the number of choices from which the student can select, or change the descriptions that are displayed on the Web page. If you do not enter data on this form, all entries in Banner validation tables are listed in the associated drop-down menus.

The screenshot shows a web browser window titled "Web for Prospects Display Rules SRAWPDS 8.0 (UDCSysT)". The form contains the following elements:

- Web Electronic Prospect Code:** A text input field followed by a dropdown arrow.
- Validation Table Name:** A text input field.
- Table Data Grid:** A table with four columns: "Table Name", "Code Value", "Description", and "Activity Date". Each column contains a series of empty input fields for data entry. The "Code Value" column has a dropdown arrow on its first cell. A vertical scrollbar is located on the right side of the grid.

Procedure

Follow these steps to select items to appear in Web drop-down lists

1. In Banner, access the Web for Prospects Display Rules Form (SRAWPDS).
2. Double-click the **Web Electronic Prospect Code** field to view the List of Values.
3. Select **Web** and click **OK**.

Note: You may enter the last four characters of a validation table name in the **Validation Table Name** field in the Key block to view only the rules for that validation table and the prospect code, or leave the **Validation Table Name** field empty to view all the rules for the prospect code.

Example: Enter *TERM* for STVTERM, *CITZ* for STVCITZ, and *RESD* for STVRESD.

Note: All of the tables that can be limited from this form are listed in the User Guide.

4. Perform a **Next Block** function to view the table names and rules used with the prospect code.

Note: The prospect codes on STVPREL must have the **Enter on WEB** check box checked to display in the List of Values for the **Web Electronic Prospect Code** field on SRAWPDS.

5. Perform an Insert Record function.
6. In the **Table Name** field, enter **MAJR**
7. Double-click the Search icon next to the **Code Value** field to view the List of Values.
8. Select **English** and click **OK**.

The description from the validation table will default, but you can type over the description to customize it. The **Activity Date** field defaults.

9. Click the **Save** icon.
10. Click the **Exit** icon.

Note: The student does not see codes on the Self-Service for Prospects Web page. They see descriptions. If you do not enter data on this form, all entries in the Banner validation table are listed.

Defining Rules for Processing Electronic Applications

Categories of rules

Rules fall into three major categories.

- Rules that control processing within the Banner Self-Service Admissions Application System. For example, there is a rule that specifies the number of outside interest slots that will display in Web applications.
- Rules that specify default values for various data elements. These kinds of rules can apply to both Web and EDI applications.
- Rules that govern how data will be loaded into the permanent Banner tables.

Example: There is a set of rules that specifies whether application records are created if one already exists for the person, term, level, major, or overall curriculum chosen.

Three general types of values may be required in the **Rule Value** field, and the **Rule Description** field usually indicates the type of value expected.

- Simple descriptive answers, like true, false, or a number to indicate the number of values that are available.
- A valid Banner validation table code, like an address type code.
- An EDI value that is valid within the TS189 transaction set. (When a valid EDI value is expected, the EDI Ind(icator) for the rule is Y).

Banner form

The Electronic Admissions Application Rules Form (SAAERUL) is used to define the rules that are used when processing electronic applications. Rows for this table are not intended to be added locally. Rules that will be used in system processing are delivered by SunGard Higher Education, and users must only update the Rule Value where indicated to reflect local processing options.

This set of rules that are delivered with your system are called the PREL group rules, and they govern how Electronic Prospect processing is handled. These rules must be set up prior to the load of any Prospect data. The procedure included here is meant to be an example of how a single rule is added or updated, depending on your institution's requirements.

Group	Rule Label	Rule Description	Value	EDI Indicator	System Required Indicator	Activity Date
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	

Procedure

Follow these steps to define rules for processing electronic applications.

1. In Banner, access the Electronic Admissions Application Rules Form (SAAERUL).
2. Double-click the **Group** field to view the List of Values.
3. Select **Web Display Rules** and click **OK**.

Note: Use the **Group** field to specify the code of the rule group for which you want to display rules. Rule groups are simply high-level descriptions of types of rules. Entering a group code will limit the display of rules to only those within the group code specified. If you do not enter a group code, all rules for all groups will be available for display in the Detail information.

4. Navigate to the Rules block.
5. Select an entry to review.
6. Note the values in these fields:

Field	Value
Rule Label	The Label field displays the internal label of the rule. The label is a system-defined value that is used in actual programming logic to identify each rule so that its value can be obtained when needed.
Rule Description	The Description field displays a description of the specific rule.
Value	The Value field is used to maintain the institution's selected value for the rule. Value is the only field which should ever be updated using this form.
EDI Indicator	The EDI Indicator is used to specify whether the rule contains an EDI value. Checked means yes and unchecked means no.
System Required Indicator	The System Required Indicator is used to specify whether the rule is a system-required value. All rules are delivered by SunGard Higher Education and needed for system processing, and therefore all rules are system-required. Checked means yes and unchecked means no.
Activity Date	Activity Date field is system-maintained. It is set to the system date when a record is added or changed.

7. These values are generally delivered as seed data by Sungard Higher Education. You may need to update the value for the rule label. Many of the rule labels are delivered with the Value of UPDATE ME in them to help you recognize what needs to be adjusted by your institution.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Procedure

Follow these steps to write an acknowledgment letter.

1. In Banner, access the Web for Prospects Acknowledgment Letter Form (SRAWACK).
2. Double-click the **Web Electronic Prospect Code** field to view the List of Values.
3. Select **Web** and click **OK**.
4. Perform a **Next Block** function to see the sequence numbers and variables for the letter.
5. Perform an **Insert Record** function.

Note: The prospect codes on STVPREL must have the **Enter on WEB** check box checked to display in the List of Values for the **Web Electronic Prospect Code** field on SRAWACK.

6. The **Sequence** field determines the order of the rows in the letter. When you first type your letter, you can leave the sequence number blank, and the sequence automatically populates when you save the letter. Or, you can type in a sequence number incrementing each line by five, just in case you need to add new lines at a later time.
7. The **Formatting** field is a drop-down menu where you can select an HTML command.

Note: The values for the field are blank, New Paragraph, New Line, or Horizontal Rule. The only time the formatting is ignored is when the **Text** and the **Prospect Data** fields are blank. This prevents blank lines from appearing in the middle of your letter. Select a value.

8. Double-click the **Prospect Data** field to view the List of Values.
9. Select **Address1** and click **OK**.
10. The **Text** field is a free format field where you can include HTML commands in the text for additional formatting. Use the **Text** icon to display the Editor window and enter your text.
11. The **Activity Date** field defaults.
12. Click the **Save** icon.
13. Click the **Exit** icon.

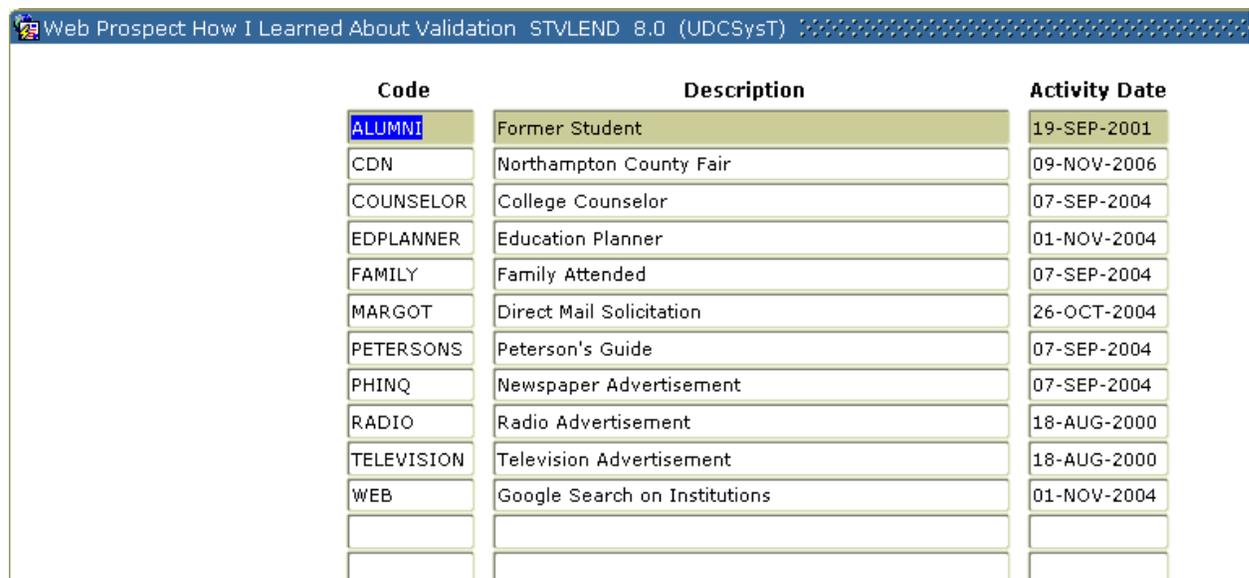
Building How I Learned About Codes

About how I learned about codes

The Web Prospect How I Learned About Validation Form (STVLEND) is used to build Self-Service for Prospects How I Learned About codes to designate how the prospect learned about the school. These codes are entered by prospects on the Self-Service for Prospects Web entry forms. The data is migrated to the Banner production Recruiting module and is available on the Recruit Prospect Information Form (SRARECR).

The How I Learned data element captures how the prospect learned about your school. The data is initially stored in the electronic prospect tables and is viewable from SRAPREL. After the prospect is migrated to Production Banner, the data is available on SRARECR. The How I Learned data is migrated to the recruit record based on the new rule value CREATELEARNED, which is stored on SAAERUL under the group PREL. If the CREATELEARNED rule is Y, the prospect's How I Learned data is migrated to the recruit How I Learned data. The How I Learned code is validated on the Banner validation form STVLEND.

Banner form



Code	Description	Activity Date
ALUMNI	Former Student	19-SEP-2001
CDN	Northampton County Fair	09-NOV-2006
COUNSELOR	College Counselor	07-SEP-2004
EDPLANNER	Education Planner	01-NOV-2004
FAMILY	Family Attended	07-SEP-2004
MARGOT	Direct Mail Solicitation	26-OCT-2004
PETERSONS	Peterson's Guide	07-SEP-2004
PHINQ	Newspaper Advertisement	07-SEP-2004
RADIO	Radio Advertisement	18-AUG-2000
TELEVISION	Television Advertisement	18-AUG-2000
WEB	Google Search on Institutions	01-NOV-2004

Procedure

Follow these steps to build How I Learned codes.

1. In Banner, access the Web Prospect How I Learned About Validation Form (STVLEND).
2. In the **Code** field, enter *FR*.
3. In the **Description** field, enter *Friend*.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Day-to-Day Operations



Introduction

The purpose of this section is to explain the day-to-day or operational procedures to utilize the Self-Service for Prospects to facilitate data entry by prospective students on the web and to process that data for loading into Banner.

Objectives

At the end of this section, you will be able to

- match new prospect records to load to Banner permanent tables
- run the Electronic Match Process
- run the Migrate Electronic Prospects Process
- process individual record tape load
- purge prospect records from temporary tables.

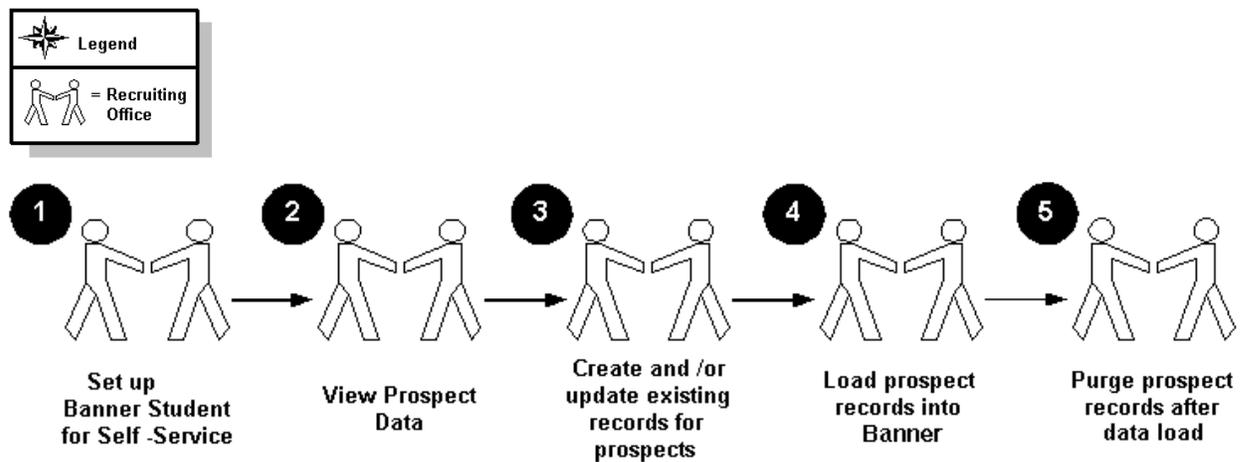
Process Introduction

Introduction

At this point you have learned about many of the features in Banner Self-Service for Prospects. You have learned what you need to set up Banner Student in order to use these features. There are various steps that are required to process and load prospect data entered on the Web into Banner. This section describes the various processes and provides directions for executing these processes.

Flow diagram

This flow chart highlights specifically what the Self Service Prospects process would look like on a day-to-day basis.



What happens

The stages of the process are described in this table.

Stage	Description
Recruiting Office	
1	Set up Banner Student to facilitate Self-Service for Prospect features
2	View prospect data in temporary tables
3	Create records and/or update existing Banner records for prospects
4	Manually or batch load prospect records from temporary tables into Banner
5	Purge prospect records from temporary tables after data load

Common Matching Process

Overview

Multiple PIDM Prevention began as a project to prevent the creation of duplicates when person and non-person records are added to the database. **Common Matching** is part of the overall multiple PIDM prevention project.

Common Matching

- uses a rules-based algorithm to check for possible database matches before a new person or non-person record is added to the system
- Since Banner Student 7.0, replaces the algorithms from Financial Aid and Student with a centralized algorithm.

About the process

When setting up Common Matching

- institutions can require the matching process to be performed prior to new records being inserted into the database
- institutions can define forms to call for additional information when resolving potential matches.

About the forms

Common Matching is used in batch data load processes and online forms that are used to create new person or non-person records (e.g., SPAIDEN).

For simplicity, this workbook refers to "%IDEN" forms when discussing Common Matching. *Appendix: Reference* contains a listing of the forms and processes which work with Common Matching.

More details

A Common Matching form can be called from key blocks of person or non-person data entry forms when generating an ID or entering an ID that does not exist in Banner.

Users may execute the common matching process at any time during data entry of person information from the Common Matching Entry form.

If a matching record exists, users have the option to enhance existing data by inserting new information. Existing data will not be overwritten.

Matching status

There are three possible results of running the Common Matching algorithm:

- New
- Match
- Potential Match

New: If no records are found to match the rules, a status of *New* is returned. You may then create a new person or non-person record or exit and return to the %IDEN form.

Match: If one and only one record matches the rules, a status of *Match* is returned and the **Match** tab will be highlighted. Data for the matched PIDM will be returned for review.

Potential Match: A status of *Potential Match* occurs if some fields match but not all, or if multiple records match exactly. For example, a potential match would occur if first name and last name match but DOB does not match. When potential matches exist, the **Potential Matches** tab will be highlighted with the number of potential matches and the records which were identified will be listed for review.

Common Matching Source Code Validation

Purpose

The Common Matching Source Code Validation Form (GTVCMSC) is used to create the various source codes that may be used in Common Matching.

Banner form

The screenshot shows a web browser window titled "Common Matching Source Code Validation GTVCMSC 8.0 (UDCSysT)". The form contains five entries, each with a "Matching Source", "Description", "User ID", and "Activity Date" field, followed by a "Comment" field. Each entry has a small edit icon to its left.

Matching Source	Description	User ID	Activity Date
AD_PERSON	Create Alumni/Constituent Records	WDAVIS	11-DEC-2006
AD_PERSON_2	Create Alumni/Constituent Records	CGALLEHE	27-FEB-2007
AP/PO VENDOR	Finance Vendor	THESS	19-APR-2005
FA_DATALOAD_EDE	Financial Aid EDE Data Load Matching Rules	JPOULIN	25-FEB-2008
FA_ONLINE_SPAIDEN	Financial Aid FFELP & Alt Loan Matching Rules	JPOULIN	05-MAR-2008

Procedure

Follow these steps to define source codes for online matching and batch process matching.

1. Access the Common Matching Source Code Validation Form (GTVCMSC).
2. Perform an **Insert Record** function.
3. Enter a source code for online matching.
Example: *ONLINE_ADMISSIONS*
4. Enter a description of the source code.
Example: *Admissions Online Data Entry*
5. Enter a comment, if desired, in the **Comment** field that describes the source code.
6. Perform an **Insert Record** function.
7. Enter a source code for batch processes.
Example: *SAT*
8. Enter a description of the source code.
Example: *SAT Batch Process*
9. Enter a comment, if desired, in the **Comment** field that describes the source code.
10. Repeat the process to enter new source codes as necessary.
11. Click the **Save** icon.
12. Click the **Exit** icon.

Common Matching Source Rules

Purpose

The Common Matching Source Rules Form (GORCMSC) is used to set up defaults to be used with a particular source code, and indicate if the source code will be used for online matching. This form is also used to identify whether the source code will be used to match against person data and/or non-person data.

Example: You can assign default address, telephone, and e-mail types to the source code, which will default into the Common Matching Entry Form (GOAMTCH) if the source code is used from there.

Optional: The Option Display Rules block allows you to specify forms to which the user can navigate on the Common Matching Entry Form (GOAMTCH). This enables users to see more detailed information about possible matched records.

Banner form

The screenshot shows the 'Common Matching Source Rules' form (GORCMSC 8.0) with the following sections:

- Matching Source:** A dropdown menu.
- Options:** Includes a 'Match Type' dropdown and several checkboxes: 'Use for Online Common Matching', 'Transpose Date Month / Day', 'Transpose First Name / Last Name', 'Allow Alias Wildcard Use', 'Allow Length Override', and 'Prevent ID Creation on API Failure'.
- Data Entry/Update Defaults:** Includes fields for 'Address', 'Telephone', and 'E-mail', each with a dropdown arrow. Below these is a checkbox for 'Create Hierarchy of Display using Defaults' and fields for 'User ID' and 'Activity Date'.
- Hierarchy of Display:** Three columns for 'Address', 'Telephone', and 'E-mail'. Each column has a dropdown arrow and a list of three empty input boxes.
- Detail List:** A table with columns for 'Object', 'Sequence', 'User ID', and 'Activity Date'. The 'Object' column has a dropdown arrow. Below the headers are three rows of empty input fields.

Procedure

Follow these steps to define defaults for address, email, and phone type to be used with a particular source code, and indicate if the source code will be used for online matching.

Note: The steps below assume that matching has been enabled on the Installation Controls Form (GUAINST) and the matching source code has been defined on Common Matching Source Code Validation Form (GTVCMSC).

1. Access the Common Matching Source Rules Form (GORCMSC).
2. Using the **Matching Source** field, select the matching source code you created on the Common Matching Source Code Validation Form (GTVCMSC).
3. Use the **Match Type** field to specify that this code will be used to match on persons, non-persons, or both. Select *Person*.
4. Enter an address type code in the **Address Type** field.

Note: Setting up default types for address, telephone, and email records is optional.

5. Enter a telephone type code in the **Telephone Type** field.
6. Enter an e-mail type code in the **E-mail Type** field.
7. Check the **Use for Online Common Matching** checkbox to indicate that the source code can be used with online matching.

Note: Any source code could be used for batch processing.

8. Click the **Create Hierarchy of Display using Defaults** button.

Result: This will populate the Hierarchy of Display block with default values. You can also choose these values if necessary by using the drop-down arrow above each field.

9. Click the **Save** icon.
10. Perform a **Next Block** function to access the Detail List block.

Note: In this example, you will use this block to indicate that the user can access SOAIDEN and GOAEMAL while on the Matching window of GOAMTCH.

11. Enter SOAIDEN in the **Object** field.
12. Enter 1 in the **Sequence** field.
13. Enter GOAEMAL in the **Object** field.

14. Enter 2 in the **Sequence** field.

15. Click the **Save** icon.

16. Click the **Exit** icon.

Common Matching User Setup

Purpose

The Common Matching User Setup Form (GORCMUS) allows you to assign a default online matching source code to a specific Banner user (Oracle User ID) for online Common Matching processing. Additionally, you can use this form to specify whether users are allowed to choose from other matching source codes or if they are restricted to using the default.

How implemented: When the user enters the Common Matching Entry Form (GOAMTCH), the assigned matching source code will default in the key block. Based upon the rules set on GORCMUS, the user may be able to change this source code.

Excluding users

Using GORCMUS, you can exempt selected users from the mandatory process by selecting the **Exclude User** checkbox.

Example: If the user is a “super-user” who never creates duplicates, you may exempt the user from having the matching form appear on SPAIDEN by checking the **Exclude User** checkbox.

Banner form

User ID	Online Matching Source	Description	Allow Other Matching Sources	Exclude User	Activity Date
ADISUSR	AD_PERSON_2	Create Alumni/Constituent Records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-FEB-2008
BJOHNSON	INTERNATIONAL	International Names	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	23-OCT-2007
BSEBASTI	REC_ADM	Recruiting and Admissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-MAY-2005
CGALLEHE	AD_PERSON_2	Create Alumni/Constituent Records	<input checked="" type="checkbox"/>	<input type="checkbox"/>	31-DEC-2007
CHEBY	AP/PO VENDOR	Finance Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	06-NOV-2007
CMCCORMI	REC_ADM	Recruiting and Admissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	02-MAR-2005
CNORRIS	AD_PERSON_2	Create Alumni/Constituent Records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-FEB-2008
CSZKARAD			<input checked="" type="checkbox"/>	<input type="checkbox"/>	20-MAR-2008
DBECKER	AP/PO VENDOR	Finance Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09-MAY-2005
DHARRISO	REC_ADM	Recruiting and Admissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-NOV-2005
JPOULIN	FA_ONLINE_SPAIDEN	Financial Aid FFELP & Alt Loan Matching Ru	<input checked="" type="checkbox"/>	<input type="checkbox"/>	05-MAR-2008
JWILSON	REC_ADM	Recruiting and Admissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	05-APR-2005
LMADDOX	HR_APPL_EMPLOYEE	HR Applicant and Employee Records	<input checked="" type="checkbox"/>	<input type="checkbox"/>	22-JUN-2006
LMCINNES	HR_APPL_EMPLOYEE	HR Applicant and Employee Records	<input checked="" type="checkbox"/>	<input type="checkbox"/>	28-APR-2005
MSPEARS	REC_ADM	Recruiting and Admissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16-MAR-2005
RFEAGIN	REC_ADM	Recruiting and Admissions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	13-DEC-2006
SHYCHE	REC_ADM	Recruiting and Admissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	24-APR-2005
THESS	AP/PO VENDOR	Finance Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20-OCT-2006
TKEENE	AP/PO VENDOR	Finance Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	29-MAR-2006
WDANLEY	HR_APPL_EMPLOYEE	HR Applicant and Employee Records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14-APR-2005
WDAVIS	HR_APPL_EMPLOYEE	HR Applicant and Employee Records	<input checked="" type="checkbox"/>	<input type="checkbox"/>	26-APR-2005
			<input type="checkbox"/>	<input type="checkbox"/>	

Procedure

Follow these steps to assign a default online matching source code to a specific Banner user.

1. Access the Common Matching User Setup Form (GORCMUS).
2. Enter the username in the **User ID** field or select one from the LOV.
3. Enter the source code in the **Online Matching Source** field or select one from the LOV.

Result: The information in the **Description** field will default.

4. Click the **Allow Other Matching Sources** checkbox if you want to allow the user to select a source code other than the default.
5. Leave the **Exclude User** checkbox unchecked.

Note: Clicking the **Exclude User** checkbox exempts the user from calling the Common Matching Entry Form automatically when creating new records.

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

Common Matching Data Dictionary

Purpose

The Common Matching Data Dictionary Form (GORCMDD) is delivered with available data elements that may be used for the Common Matching process. You can add data elements as necessary to be used with package procedures developed by your institution.

Banner form

Base Table	Column	Element	Maximum Length	Length Updateable	Allow Negative Length	Online Indicator	Core Matching Element	System Required	Activity Date
GOREMAL	GOREMAL_EMAIL_ADDRES	EMAIL	128	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SABSUPL	SABSUPL_AMCAS_ID	AMCAS ID	10	<input type="checkbox"/>	22-NOV-2005				
SORHSCH	SOBSBGI_CITY	HIGH SCHOOL CITY	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09-JUN-2005
SORHSCH	SOBSBGI_STAT_CODE	HIGH SCHOOL STATE	3	<input type="checkbox"/>	09-JUN-2005				
SORHSCH	SOBSBGI_ZIP	HIGH SCHOOL ZIPCODE	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09-JUN-2005
SORHSCH	SORHSCH_SBGI_CODE	HIGH SCHOOL CODE	6	<input type="checkbox"/>	09-JUN-2005				
SORHSCH	STVSBGI_DESC	HIGH SCHOOL NAME	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09-JUN-2005
SPBPERS	SPBPERS_BIRTH_DATE	BIRTH DATE	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09-JUN-2006
SPBPERS	SPBPERS_BIRTH_DAY	DATE OF BIRTH DAY	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPBPERS	SPBPERS_BIRTH_MON	DATE OF BIRTH MONTH	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPBPERS	SPBPERS_BIRTH_YEAR	DATE OF BIRTH YEAR	4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPBPERS	SPBPERS_SEX	GENDER	1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPBPERS	SPBPERS_SSN	SSN/SIN/TIN	15	<input checked="" type="checkbox"/>	09-JUN-2006				
SPRADDR	SPRADDR_CITY	CITY	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPRADDR	SPRADDR_CNTY_CODE	COUNTY	5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPRADDR	SPRADDR_NATN_CODE	NATION	5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPRADDR	SPRADDR_STAT_CODE	STATE/PROVINCE	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPRADDR	SPRADDR_STREET_LINE1	STREET LINE 1	75	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPRADDR	SPRADDR_ZIP	ZIP/POSTAL CODE	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPRIDEN	SPRIDEN_ID	ID	9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPRIDEN	SPRIDEN_SEARCH_FIRST_	FIRST NAME	60	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005
SPRIDEN	SPRIDEN_SEARCH_LAST_N	LAST NAME/NON-PERSON N	60	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	21-JAN-2005

Fields

These fields act as indicators to determine how the data elements are implemented when creating the rules for the Matching Source.

Field	Description
Length Updateable	If checked, indicates that the user can define the number of characters to be used in matching, up to the maximum length specified.
Allow Negative Length	If checked, the negative length will be the number of characters from the end of the field. If not checked, the system will use the first number of characters from the beginning of the field. Example: Using the last four digits of SSN instead of the entire field
Online Indicator	If checked, designates the data element is available on the Common Matching Entry Form for use with online matching.
Core Matching Element	If checked, indicates the data element is required for all rules.

Procedure

Follow these steps to insert a record into the data dictionary.

Note: The data dictionary delivered with System Indicator of *Y* cannot be modified or deleted using the Common Matching Data Dictionary Form (GORCMDD). The procedure below is for reference only. Additional technical setup would be needed to actually implement a new data element.

1. Access the Common Matching Data Dictionary Form (GORCMDD).
2. Perform an **Insert Record** function.
3. Enter *a table name* in the **Base Table** field.
4. Enter *a column name* in the **Column** field.
5. Enter *a description of what the item is* in the **Element** field.
6. Enter *the value for the maximum length* in the **Maximum Length** field.
7. Select the **Allow Negative Length** checkbox if you will allow the entry of the last number of characters/digits.

Note: The **Allow Negative Length** checkbox must be selected to match the characters from the end of the field.

8. Leave the **Online Indicator** unchecked.
9. Click the **Save** icon.
10. Click the **Exit** icon.

Common Matching Rules

Purpose

The Common Matching Rules Form (GORCMRL) is used to set up the actual matching rules associated with the source code.

Use this form to:

- create the matching rules and assign the specific database values which each rule will use in the matching algorithm
- assign a priority to each rule
- copy previously created rules.

This form also allows for adding specific database procedures for matching components that are not within General Banner tables (e.g., matching on high school data for Banner Student) to the matching rule.

Note: You must set up the matching source code on the Common Matching Source Rules Form (GORCMSC) prior to setting up the rules on GORCMRL.

Banner form

Column	Element	Length	Match on Null Data	User ID	Activity Date
SPBPERS_SEX	GENDER	1	<input checked="" type="radio"/> Yes <input type="radio"/> No	BJOHNSON	12-NOV-2006
SPRADDR_STREET_LINE1	STREET LINE 1	30	<input checked="" type="radio"/> Yes <input type="radio"/> No	BJOHNSON	12-NOV-2006
SPRIDEN_SEARCH_FIRST_NAME	FIRST NAME	5	<input checked="" type="radio"/> Yes <input type="radio"/> No	BJOHNSON	29-JUN-2005
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	7	<input checked="" type="radio"/> Yes <input type="radio"/> No	BJOHNSON	29-JUN-2005
			<input type="radio"/> Yes <input type="radio"/> No		
			<input type="radio"/> Yes <input type="radio"/> No		
			<input type="radio"/> Yes <input type="radio"/> No		
			<input type="radio"/> Yes <input type="radio"/> No		

Procedure 1

Follow these steps to define the rules for the online matching source code you created.

1. Access the Common Matching Rules Form (GORCMRL).
2. Enter the matching source code in the **Matching Source** field.
3. Perform a **Next Block** function.
4. Enter a priority in the **Priority** field.
5. Enter a description of the rule in the **Description** field.
6. Click the **Save** icon.
7. Click the **Insert Core Matching Elements** button.

Result: This pulls any required data elements into the next block, e.g., SPRIDEN_SEARCH_LAST NAME.

8. Select these data element from the LOV:

SPBPERS_SSN

SPRIDEN_SEARCH_FIRST_NAME

SPRADDR_ZIP

9. For SPRIDEN_SEARCH_LAST_NAME, update the length from 60 to 10.

Result: The first 10 characters of the last name will be used when matching the data element.

10. For SPRIDEN_SEARCH_FIRST_NAME, update the length from 15 to 5.

Result: The first 5 characters of the first name will be used when matching the data element.

11. For SPBPERS_SSN, update the length from 9 to -4.

Result: The last 4 characters of the SSN/SIN/TIN will be used when matching the data element.

12. Update the **Match on Null Data** indicator for SPBPERS_SSN to *Yes*.

13. Click the **Save** icon and proceed to the next Procedure.

Procedure 2

Follow these steps to enter a new priority and copy the rule you just created to that priority.

1. Perform a **Previous Block** function.
2. Perform an **Insert Record** function.
3. Enter a new priority and description.
4. Click the **Save** icon.
5. Use the Up Arrow to navigate to the priority you created in Procedure 1.
6. Select the **Copy To** tab
7. Use the LOV to select the new priority.

Result: The **Source Code** and **Priority** fields will populate with the appropriate values. Only priorities that do not have rules will be listed.

8. Click the **Save** icon.
9. Click the **Matching Rules** tab to view the rules.

10. Click the **Exit** icon.

Procedure 3

Follow these steps to use the Matching Procedures tab.

1. Access the Common Matching Rules Form (GORCMRL).
2. Enter the matching source code in the **Matching Source** field.
3. Select the **Matching Procedures** tab.
4. Enter a sequence number in the **Sequence** field.
5. Enter the name of the package procedure to be called by the Common Matching process in the **Procedure** field.

Example: SAKMTCH.P_MATCH_SORHSCH

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

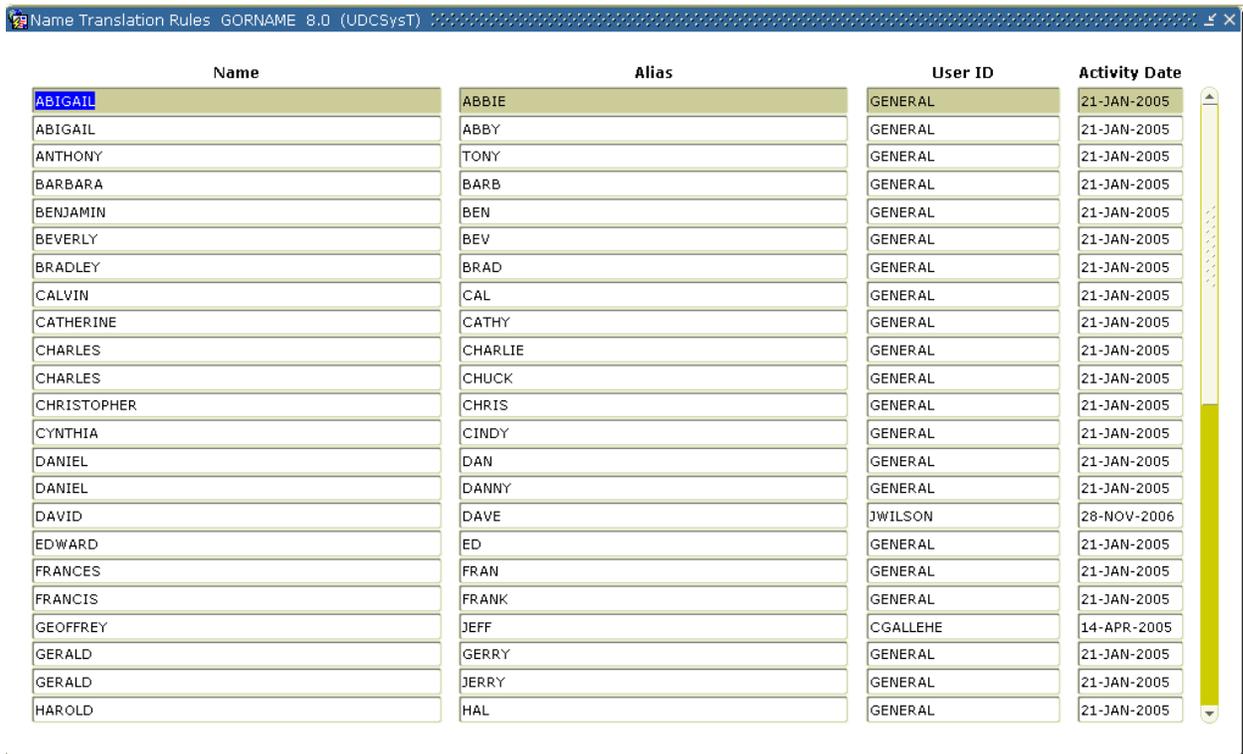
Name Translation Rules

Purpose

The Name Translation Rules Form (GORNAME) allows you to associate aliases for person names. This form can be used for first and middle names and is delivered with data for common names.

Note: Alias matching works both ways. For example, there is no need to enter "Elizabeth = Liz" and "Liz = Elizabeth" as separate rules.

Banner form



Name	Alias	User ID	Activity Date
ABIGAIL	ABBIE	GENERAL	21-JAN-2005
ABIGAIL	ABBY	GENERAL	21-JAN-2005
ANTHONY	TONY	GENERAL	21-JAN-2005
BARBARA	BARB	GENERAL	21-JAN-2005
BENJAMIN	BEN	GENERAL	21-JAN-2005
BEVERLY	BEV	GENERAL	21-JAN-2005
BRADLEY	BRAD	GENERAL	21-JAN-2005
CALVIN	CAL	GENERAL	21-JAN-2005
CATHERINE	CATHY	GENERAL	21-JAN-2005
CHARLES	CHARLIE	GENERAL	21-JAN-2005
CHARLES	CHUCK	GENERAL	21-JAN-2005
CHRISTOPHER	CHRIS	GENERAL	21-JAN-2005
CYNTHIA	CINDY	GENERAL	21-JAN-2005
DANIEL	DAN	GENERAL	21-JAN-2005
DANIEL	DANNY	GENERAL	21-JAN-2005
DAVID	DAVE	JWILSON	28-NOV-2006
EDWARD	ED	GENERAL	21-JAN-2005
FRANCES	FRAN	GENERAL	21-JAN-2005
FRANCIS	FRANK	GENERAL	21-JAN-2005
GEOFFREY	JEFF	CGALLEHE	14-APR-2005
GERALD	GERRY	GENERAL	21-JAN-2005
GERALD	JERRY	GENERAL	21-JAN-2005
HAROLD	HAL	GENERAL	21-JAN-2005

Procedure

Follow these steps to associate aliases with person names.

1. Access the Name Translation Rules Form (GORNAME).
2. Perform an **Insert Record** function.
3. Enter the person name in the **Name** field.
4. Enter the alias in the **Alias** field.
5. Click the **Save** icon.

Warning: Once the name/alias has been saved, no updates may be made to the record. The record must be deleted and re-entered if changes are necessary.

6. Click the **Exit** icon.

Running the Electronic Match Process

Overall process

Run the Electronic Prospect Match Process (SRRSRIN) to determine if a match exists between a record on the Search Tape View (SRVPREL) and Banner production data when loading search or test score tape records en masse.

The process uses the interface code and the rules established on the Common Matching Rules Form (GORCMRL) to determine if a record on SRVPREL has a match in Banner. The process runs against all records in SRVPREL that have a match status of null and a load status of null. This assumes that if you change the matching rules on GORCMRL, you are not able to rematch someone on SRVPREL who has already been matched, because the person's match status will no longer be null. This process sets the match status on SRVPREL to either New, Matched or Suspense. The Suspense records can be viewed and updated on the Prospect Matching Form (SRQMTCH), which is accessed from the Electronic Prospect Query Form (SRIPREL).

The screenshot shows a web-based interface for the 'Electronic Prospect Match' process. The window title is 'Process Submission Controls - GJAPCTL 8.0 (UDCSysT)'. The interface is divided into several sections:

- Process:** SRRSRIN (dropdown) and Electronic Prospect Match (text input).
- Parameter Set:** (dropdown menu).
- Printer Control:** Printer: DATABASE (dropdown), Special Print: (text input), Lines: (checkbox), Submit Time: (text input).
- Parameter Values:** A table with columns for 'Number', 'Parameters', and 'Values'.

Number	Parameters	Values
01	Electronic Prospect Code	
02	Tape ID	
03	Report Type (if Parm 04 = N)	A
04	Auto Load (Skip Dup Chk)	N
05	Student Type	

LENGTH: 10 TYPE: Character O/R: Required M/S: Single
Enter Electronic Prospect Code
- Submission:** Save Parameter Set as, Name: (text input), Description: (text input), Hold, Submit.

Procedure

Follow these steps to match and update prospect records.

1. In Banner, access the Electronic Prospect Match Process (SRRSRIN) to match and update each record with a value of *Matched*, *New*, or *Suspense*. This process uses the rules set up on GORCMRL for the tape type.
2. Perform a **Next Block** function.
3. Double-click in the **Printer** field to view the List of Values.
4. Select an appropriate printer.

Note: Most of the time you will select DATABASE so you will be able to see, but need not print, the results.

5. Click **OK**.
6. Perform a **Next Block** function.
7. Enter the parameters.

Req?	Parameter	Value
✓	Electronic Prospect Code	Electronic prospect code to determine which records in the Search Tape View (SRVPREL) will be processed Example: <i>SAT</i> —SAT Test Tape
	Tape ID	Code for prospect tape ID
✓	Report Type	Report type value— <i>E</i> (Error), <i>N</i> (New), <i>M</i> (Match), <i>A</i> (All) Default: <i>A</i>
✓	Auto Load (Skip Dup Chk)	Enter <i>Y</i> to automatically load new or matched IDs, <i>N</i> to do Dup Processing

8. Perform a **Next Block** function.
9. Select the **Save Parameters** check box if you want to save these parameters for future use.
10. In the **Name** and **Description** fields, enter a name and description for your parameters.

11. Select the **Hold** radio button if you want to run this process later or the **Submit** radio button if you want this process to run immediately.
12. Click the **Save** icon.
13. Click the **Exit** icon.

Running the Migrate Electronic Prospects Process

Introduction

The Migrate Electronic Prospects Process (SRRPREL) is used to create or update Banner recruiting or admissions records for the tape records in the Search Tape View (SRVPREL), depending on how the parameters are set. SRRPREL processes all search or test score tape records that have a Status Match of New or Matched with an empty Status Load, depending on the entered parameter values. Once a record has been loaded, its load status is set to C.

The source and contact codes identified as parameters on the SRTLOAD process are loaded to the new or updated recruiting or admissions records based on the values for these rules on the Electronic Admissions Application Rules Form (SAAERUL). If no values are entered for these parameters in the SRTLOAD process, the values entered on STVINFC will be used. SRRPREL allows for the update of an existing recruiting or admissions record instead of always creating a new recruiting record if you request that additional information be loaded. Default values from SRAPRED will be used if they have been set up.

Banner process

The screenshot shows the 'Process Submission Controls' window for the SRRPREL process. The window title is 'Process Submission Controls - GJAPCTL 8.0 (UDCSYST)'. The 'Process' dropdown is set to 'SRRPREL' and the 'Parameter Set' dropdown is empty. The 'Printer Control' section includes a 'Printer' dropdown set to 'DATABASE', 'Special Print' field, 'Lines' set to '55', and 'Submit Time' field. The 'Parameter Values' section is a table with columns for 'Number', 'Parameters', and 'Values'. The first row is pre-filled with '01', 'Electronic Prospect Code', and an empty value field. Below the table, it specifies 'LENGTH: 10 TYPE: Character O/R: Required M/S: Single' and 'Electronic Prospect Code'. The 'Submission' section at the bottom has a 'Save Parameter Set as' checkbox, 'Name' and 'Description' fields, and radio buttons for 'Hold' and 'Submit'.

Number	Parameters	Values
01	Electronic Prospect Code	
02	Tape ID	
03	Match Status	
04	Student Type	

LENGTH: 10 TYPE: Character O/R: Required M/S: Single
Electronic Prospect Code

Save Parameter Set as Name: Description: Hold Submit

Procedure

Follow these steps to migrate electronic prospect records.

1. In Banner, access the Migrate Electronic Prospects Process (SRRPREL).
2. Perform a **Next Block** function.
3. Double-click in the **Printer** field to view the List of Values.
4. Select an appropriate printer.

Note: Most of the time you will select DATABASE so you will be able to see, but need not print, the results.

5. Click **OK**.
6. Perform a **Next Block** function to navigate to the Parameters Values block.

7. Enter the parameters.

Req?	Parameter	Value
✓	Electronic Prospect Code	Electronic prospect code to determine which records in the Search Tape View (SRVPREL) will be processed Example: <i>SAT</i> —SAT Test Tape
	Tape ID	Code for prospect tape ID
✓	Match Status	Enter <i>M</i> to select only matched rows, <i>N</i> (New), or <i>A</i> (All)

8. Perform a **Next Block** function.

9. Select the **Save Parameters** check box if you want to save these parameters for future use.

10. In the **Name** and **Description** fields, enter a name and description for your parameters.

11. Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.

12. Click the **Save** icon.

13. Click the **Exit** icon.

Processing Individual Record Tape Load

Introduction

When performing individual record tape load processing, you will follow these general steps.

- Create the data file for loading.
- Run the Electronic Prospect Load Process (SRTLOAD) to load the data into the temporary tables.
- Use the functionality on Electronic Prospect Inquiry Form (SRIPREL), **Create Recruit/Applicant** item in the **Options** Menu, to:
 - Query record(s) for the desired tape type.
 - Resolve suspended or duplicate records using the Common Matching Entry Form (GOAMTCH).
 - Create new search or test score records or update existing search or test score records.
 - Create new recruiting records.
 - Insert new source data into existing recruiting and admissions data.
 - (Optional) Run the Electronic Prospect Purge (SRTPURG) to remove records from the temporary tables based on the report parameter values.

Specific forms, processes, and procedures are covered in the pages that follow.

Electronic Prospect Load Process (SRTLOAD)

The screenshot shows a window titled "Process Submission Controls GJAPCTL 8.0 (UDCSysT)". It contains several sections:

- Process:** A dropdown menu set to "SRTLOAD" and a text field containing "Electronic Prospect Load".
- Parameter Set:** A dropdown menu.
- Printer Control:** A "Printer:" dropdown menu set to "DATABASE", a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. Below the table, there are "Values" input fields. The value for parameter 06 is "G".
- Submission:** A checkbox for "Save Parameter Set as", "Name:" and "Description:" text fields, and radio buttons for "Hold" and "Submit".

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
Data file name, can include the directory: /tmp/search.dat.

Procedure

After the data file for loading has been created, follow these steps to run the Electronic Prospect Load Process (SRTLOAD).

1. Access the Electronic Prospect Load Process (SRTLOAD).

Note: Always run SRTLOAD in audit mode first to determine the values that are missing in Banner. These values need to be created in Banner or converted on SOTCNVT (where appropriate) before running SRTLOAD in update mode.

2. Perform a **Next Block** function.
3. Double-click in the **Printer** field to view the List of Values.
4. Select an appropriate printer or enter *DATABASE*.
5. Click **OK**.
6. Perform a **Next Block** function to navigate to the Parameters Values block.

7. Enter the parameters, using the table as a guide.

Parameter	Value	Req?
Data File Name	Data file name containing the search or test score tape records or test score tape records to be loaded; can include the directory: /tmp/search.data.	Yes
Electronic Prospect Code	Electronic prospect code to be used in the load; see table below for values.	Yes
Tape ID	Additional ID of the tape; useful if loading multiple tapes of same prospect code.	No
AMCAS School Number	Enter the AMCAS school code to be processed in the load. This parameter is optional for all incoming AMCAS files.	No
SSN or Generated ID	Enter <i>S</i> to use SSN (Social Security Number) on data file; enter <i>G</i> to always generate an ID. Note: If the ID is generated or the incoming data is all zeros (as is the case with some ACT records), the process will display <i>GEN</i> in the ID field on the output report when the report is executed in audit mode; the actual generated IDs will display on the output report when the report is executed in update mode.	Yes
Term Code	Term code that will be used if a term code cannot be determined from the high school graduation date on the search or test score tape and the SOTCNVT conversion rules.	Yes
Level Code	Level code that will go on the prospect record Example: <i>UG</i> – undergraduate	Yes
Campus Code	Campus code that will go on the prospect record Example: <i>M</i> – Main	No

8. Continue entering the parameters.

Parameter	Value	Req?
AMCAS Degree Code	Degree code for the prospect record. This parameter is optional for all tapes except AMCAS.	No
AMCAS Major Code	Major code for the prospect record. This parameter is optional for all tapes except AMCAS. AMCAS requires the major code for the application when SRTLOAD is run for the electronic prospect code <i>AMCS</i> .	No
Department Code	Department code for the prospect record.	No
Contact Code	Contact code that will go on the prospect record Example: <i>TAP</i> – Test score tape	No
Source Code	Source code that will go on the prospect record Example: <i>1008</i> – Alcorn State University	No
Address Type Code	Address type code for the prospect Example: <i>PR</i> – permanent	Yes
Address Source Code	Address source code for the prospect record	Yes
Telephone Type Code	Default telephone type code for prospect record Example: <i>P1</i> – Parent 1	No
Email Type Code	Email type code for the prospect Example: <i>CAMP</i> – campus email	No
Print Test Scores	Enter <i>Y</i> to print test scores on the report while processing test score records; enter <i>N</i> to suppress printing test scores Default: <i>Y</i> – Yes	Yes
Default Test Month	Default month for the test, if none exists on the input file. Values: <i>01</i> – <i>12</i>	No

9. Continue entering the parameters.

Parameter	Value	Req?
Print County Code Errs (AMCAS)	Enter <i>Y</i> to print validation errors for the county for AMCAS processing or <i>N</i> to not print validation errors.	Yes
Print Validation Summary	Enter <i>Y</i> to print the validation summary or <i>N</i> to not print the validation summary.	Yes
Run Mode	Enter <i>U</i> to update the database; enter <i>A</i> to produce audit report Default: <i>U</i> Note: Run the process in audit mode to determine what values are missing from Banner (e.g., high school codes, major codes). If these values are not created in Banner and converted using SOTCNVT where appropriate, the value will not be loaded into Banner.	Yes

10. Perform a **Next Block** function.

11. Select the **Save Parameters** checkbox if you want to save these parameters for future use.

12. In the **Name** and **Description** fields, enter a name and description for your parameters, if appropriate.

13. Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.

14. Click the **Save** icon.

15. Click the **Exit** icon.

Note: If you selected the **Submit** radio button, the process will run when you save your work.

Load status and match status

A load status code exists for each record in the Search Tape View (SRVPREL). The load status is displayed on the Electronic Prospect Inquiry Form (SRIPREL) in the **Load** field and, if it is set to *C*, indicates that a Banner record has been created or updated in Banner for this person from a tape load process. You can refer to the prospect code information to determine what type of tape load was used with this record. (If the field is empty, then the record has not been created or updated in Banner.)

A match status also exists for each record in the Search Tape View (SRVPREL). This status indicates that the record Matched someone in Banner production (via the SRRSRIN process or the **Match** icon on SRQMTCH), that the record is New and this person does not exist in Banner, that the record is Suspended, or that an Error occurred when the SRRSRIN match process was run.

If the record's **Load** and **Match** fields are empty (indicating that this record has not been matched or loaded), then you need to see if the person already exists in Banner. You will use the **Match** option in the **Options** menu to associate the person with an ID and use the Common Matching Entry Form (GOAMTCH).

Note: See the procedure that follows for complete steps. Note that the match process cannot be undone.

Banner form

Electronic Prospect Inquiry SRIPREL 8.0 (UDCSysT)

Prospect ID	Last Name	First Name	Middle Initial	Prospect Code	Tape ID	Student Type	Match Status	Load Status
						None	None	

Street Line 1: City: State: ZIP or Postal Code: High School: Birth Date: Add Date:

Street Line 1: City: State: ZIP or Postal Code: High School: Birth Date: Add Date:

Street Line 1: City: State: ZIP or Postal Code: High School: Birth Date: Add Date:

Procedure

Follow these steps to query the Search Tape View (SRVPREL) to match prospect records and/or reconcile Banner records.

1. Access the Electronic Prospect Inquiry Form (SRIPREL) to query the Search Tape View (SRVPREL) to find matches for test score reports.
2. You can search on the following fields: **Prospect ID, Last Name, First Name, Middle Initial, Prospect Code, Tape ID, Status Match, Status Load, Street1, ZIP or Postal Code, High School, Birth Date, and Add Date.**

Note: Once a matching record or group of potential matches has been retrieved, you can select a specific record.

3. Select **Detail** from the **Options** menu to access the Electronic Prospect Detail Form (SRAPREL).

Note: This form displays biographical information associated with the search or test score tape record selected on SRIPREL, information about the search tape from which this record was created, or test score information, interest information, and information about the test score report tape from which this record was created.

4. Once you are convinced you have the correct person, exit the form to return to the Electronic Prospect Inquiry Form (SRIPREL).
5. Are the record's **Status Load** and **Match** fields empty? (This would indicate that this record has not been matched or loaded.)

If yes, then you need to see if the person already exists in Banner. Exit the form and select **Match** from the **Options** menu.

6. Click **Associate Person with an ID.**

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

7. Select a matching source in the **Matching Source** field, if necessary.
8. Enter information in the appropriate fields in the Data Entry block and select the **Duplicate Check** icon.
9. Is a match found?

If yes, click on the **Match** icon. This reconciles the existing Banner production record with the new prospect or test score record, combining them with one valid Banner PIDM.

If no match is found, cancel query and exit form.

10. You will be returned to SRIPREL.

Result: The **Match** field will have been updated and will display the appropriate value for this record when a new query is run.

11. Select **Create** from the **Options** menu to load the record.

Note: Whether a match exists in Banner or not, you must select **Create** from the **Options** menu to either create or update a Banner recruit record and associated records. The load status will be set to *C*, indicating that a Banner record has been created and/or updated for this person.

12. Click the **Save** icon.

13. Click the **Exit** icon.

Purging Data

Introduction

Use the Electronic Prospect Purge Process (SRTPURG) to purge data from the temporary tables based on the following parameters: electronic prospect code, tape ID, term code, level code, date added (date data was loaded into the temporary tables), match status, load status, date loaded (date data was loaded to Banner), print detail on report, and run mode. The **Print Detail on Report** parameter determines what will be included on the report output. Use the **Electronic Prospect Code** parameter to purge all records associated with a specific search tape (for example, Peterson) or specific tape type (for example, SAT).

The screenshot shows a web browser window titled "Process Submission Controls - GJAPCTL 8.0 (UDCSysT)". The interface is divided into several sections:

- Process:** A dropdown menu set to "SRTPURG" and a text input field containing "Electronic Prospect Purge".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown set to "DATABASE", a "Special Print:" text input, "Lines:" set to "55", and a "Submit Time:" text input.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown arrow. To the right, there is a "Values" column with a dropdown arrow and a vertical scrollbar. The table lists parameters 01 through 08: Electronic Prospect Code, Tape ID, Term Code, Level Code, Date Added, Match Status, Load Status, and Date Loaded.
- Submission:** A section with a checkbox for "Save Parameter Set as", a "Name:" text input, a "Description:" text input, and radio buttons for "Hold" and "Submit".

LENGTH: 10 TYPE: Character O/R: Required M/S: Single
Electronic Prospect code of records to be purged.

Procedure

Follow these steps to purge prospect records from the temporary tables.

1. In Banner, access SRTPURG (Electronic Purge Process).
2. Perform a **Next Block** function.
3. Select an appropriate printer.

Note: Most of the time you will select DATABASE so you will be able to see, but need not print, the results.

4. Perform a **Next Block** function.
5. Enter the appropriate parameters.

Parameter	Value	Req?
Electronic Prospect Code	Enter the electronic prospect code to be used in the purge.	Yes
Tape ID	Enter the additional ID used to identify the tape during the load process.	No
Term Code	Enter the term code of the prospect records to be purged.	No
Level Code	Enter the level code of the prospect records to be purged.	No
Date Added	Enter the date the record was loaded to the temporary tables via SRTLLOAD.	No
Match Status	Enter the match status to indicate that only records with this match status should be purged.	No
Load Status	Enter the load status to indicate that only records with this load status should be purged.	No
Date Loaded	Enter the date when records to be purged were originally loaded into Banner	No
Print Detail on Report	Enter <i>Y</i> to print the detail or <i>N</i> to not print the detail.	No

Parameter	Value	Req?
Run Mode	Enter <i>U</i> to update the database or <i>A</i> to run an audit report. Note: Run the process in audit mode to determine which records will be removed from the temporary tables.	Yes

6. Perform a **Next Block** function.
7. Select the **Save Parameters** checkbox if you want to save these parameters for future use. In the **Name** and **Description** fields, enter a name and description for your parameters.
8. Select the **Hold** radio button if you want to run this process later or the **Submit** radio button if you want this process to run immediately.
9. Click the **Save** icon.
10. Click the **Exit** icon.

Note: If you selected the **Submit** radio button, the process will run when you save your work.

Summary

Let's review

As a result of completing this workbook, you can

- set up key forms, tables, and reports in Banner Student Self-Service for Prospects
- follow key processes and query tables
- demonstrate to your students how to follow the Self-Service for Prospects Web page entry
- query prospect data to create new or update existing Banner records
- purge prospect records from temporary tables after data load.

Self Check

Directions

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

Question 1

What check box do you select to enable Web viewing?

Question 2

The function of the **Display Order on Web** field is to display the order of what?

Question 3

What form is used to define default recruit values for Web entered data?

Question 4

In what field do you enter the last four characters of a validation table name to view only the rules for that validation table and the prospect code?

Question 5

What is the function of the **Group** field?

Question 6

What is the function of the Web Prospect How I Learned About Validation Form (STVLEND)?

Question 7

To which form are interface codes added?

Question 8

You will run the Electronic Match Process to determine if a match exists between what when loading search or test score tape records en masse?

Question 9

The Migrate Electronic Prospects Process (SRRPREL) is used to create or update Banner recruiting or admissions records for the tape records in the Search Tape View (SRVPREL), depending on how the parameters are set. (You would see these records using the Electronic Prospects Query Form (SRIPREL)).

True or False

Question 10

What code exists for each record in the Search Tape View (SRVPREL)?

Answer Key for Self Check

Question 1

What check box do you select to enable Web viewing?

Enter on Web check box

Question 2

The function of the **Display Order on Web** field is to display the order of what?

The function of the Display Order on Web field is to designate the order of the modules on the Web page.

Question 3

What form is used to define default recruit values for Web entered data?

The Web for Prospect Default Options Form (SRAPRED)

Question 4

In what field do you enter the last four characters of a validation table name to view only the rules for that validation table and the prospect code?

Validation Table Name field

Question 5

What is the function of the **Group** field?

The Group field specifies the code of the rule group for which you want to display rules.

Question 6

What is the function of the Web Prospect How I Learned About Validation Form (STVLEND)?

The Web Prospect How I Learned About Validation Form (STVLEND) is used to

build Web for Prospects How I Learned About codes to designate how the prospect learned about the school.

Question 7

To which form are interface codes added?

Add the interface codes to the Interface Code Validation Form (STVINFC).

Question 8

You will run the Electronic Match Process to determine if a match exists between what when loading search or test score tape records en masse?

Run the Electronic Match Process to determine if a match exists between a record on the Search Tape View (SRVPREL) and Banner production data when loading search or test score tape records en masse. You can view this on the Electronic Prospect Inquiry Form (SRIPREL).

Question 9

The Migrate Electronic Prospects Process (SRRPREL) is used to create or update Banner recruiting or admissions records for the tape records in the Search Tape View (SRVPREL), depending on how the parameters are set. (You would see these records using the Electronic Prospects Query Form (SRIPREL)).

True

Question 10

What code exists for each record in the Search Tape View (SRVPREL)?

A load status code exists for each record in the Search Tape View (SRVPREL). You can view this on the Electronic Prospect Inquiry Form (SRIPREL).

Appendix



Forms Job Aid

Form	Full Name	Use this Form to...
STVPREL	Electronic Prospect Validation	to define the various types of search or test score tapes that are to be loaded
STVLEND	Web Prospect How I Learned About Validation	to build Web for Prospects How I Learned About codes to designate how the prospect learned about the school
STVWPIC	Web Prospect Information Validation	to build Web for Prospects information selection codes for Web data entry sections
SRAWPRO	Web Prospect Selection Rules	to identify the selections for display on the Web and the order in which they display
STVWACK	Web Acknowledgement Validation	to build Web for Prospects acknowledgement codes for data elements from the Electronic Prospect System
SRAWACK	Web for Prospects Acknowledgement Letter	to customize the acknowledgement letter. The acknowledgement letter will appear on the Web page after the student presses the Submit button
STVINFC	Interface Validation	to create, update, insert, and delete interface codes, such as ACT, Financial Aid CSS tape, or GRE, and so on. It is also used to assign a matching source code to the interface code in order to define the matching rules to be used with that interface code

Form	Full Name	Use this Form to...
STVINTS	Outside Interests Code Validation	to create, update, insert, and delete codes representing outside interests, such as Vocal Music, Debate, Varsity Athletics, and so on
STVMATL	Material Codes Validation	to create, update, insert, and delete material codes for use in communication plans and letter generation, such as President Greeting Letter, Campus Brochure, Course Schedule, and so on
SRAPRED	Web for Prospects Default Options	to enter the default recruit values for Web-entered data. You can designate default values that can be used to populate the recruiting record (SRBRECR) or applicant record (SARADAP) when a record is created via the Migrate Electronic Prospects Process (SRRPREL) or by using the Create Recruit/Applicant item in the Options Menu on the Electronic Prospect Inquiry Form (SRIPREL). This form is also used in the tape load process
SRAWPDS	Web for Prospects Display Rules	to reduce the number of choices the student can select from or to change the descriptions that will display on the Web
STVSBGI	Source/Background Institution Code Validation	to create, update, insert, and delete source/background institution codes, such as Sungard University, Hard Knocks College, and so on
SOASBGI	Source/Background Institution Base	to capture general information, such as address, comments, and contacts, about a source or background institution. Most of the information captured is not validated to allow for flexibility
SAAERUL	Electronic Application	to define the rules which are used when processing electronic applications, electronic prospects, and tapeloads
GTVCMSC	Common Matching Source Code Validation	to create the various source codes that may be used in Common Matching
GORCMSC	Common Matching Source Rules	to set up defaults to be used with a particular source code, and indicate if the source code will be used for online matching. This form is also used to identify whether the source code will be used to match against person data and/or non-person data

Form	Full Name	Use this Form to...
GORCMUS	Common Matching User Setup	to assign a default online matching source code to a specific Banner user (Oracle User ID) for online Common Matching processing. Additionally, you can use this form to specify whether users are allowed to choose from other matching source codes or if they are restricted to using the default
GORCMDD	Common Matching Data Dictionary	add data elements as necessary to be used with package procedures developed by your institution
GORCMRL	Common Matching Rules	to set up the actual matching rules associated with the source code
GORNAME	Name Translation Rules	to associate aliases for person names. This form can be used for first and middle names and is delivered with data for common names
GOAMTCH	Common Matching Entry	to associate the person with an ID
SRRSRIN	Electronic Prospect Match Process	to determine if a match exists between a record on the Search Tape View (SRVPREL) and Banner production data when loading search or test score tape records en masse
SRRPREL	Migrate Electronic Prospects Process	to create or update Banner recruiting or admissions records for the tape records in the Search Tape View (SRVPREL), depending on how the parameters are set
SRTLOAD	Electronic Prospect Load Process	to load the data into the temporary tables
SRVPREL	Search Tape View	to match prospect records and/or reconcile Banner records
SRIPREL	Electronic Prospect Inquiry	to query the Search Tape View (SRVPREL)
S RTPURG	Electronic Prospect Purge Process	to purge data from the temporary tables based on certain parameters