# Banner Student
# Recruitment Training Workbook

*May 2006*

*Release 7.3*

SUNGARD HIGHER EDUCATION

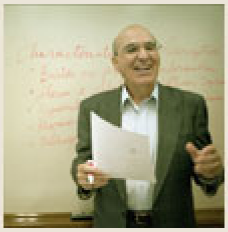
What can we help you achieve?

Prepared By: SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America

# Table of Contents

# Table of Contents (Continued)

# Table of Contents (Continued)



# Section A: Introduction

## Lesson: Overview

Jump to TOC

**Workbook goal**

The goal of this workbook is to provide you with the knowledge and practice to perform recruiting processes for your institution. The workbook is divided into three sections:

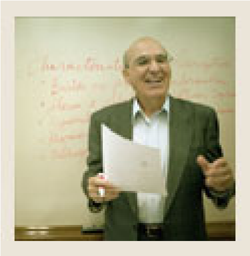
- Introduction
- Set Up
- Day-to-Day Operations

Note: Tape Load Processing is covered in the Tape Load Processing workbook.

**Intended audience**

Personnel from offices responsible for entering recruiting information

**Section contents**



# Section A: Introduction

## Lesson: Process Introduction

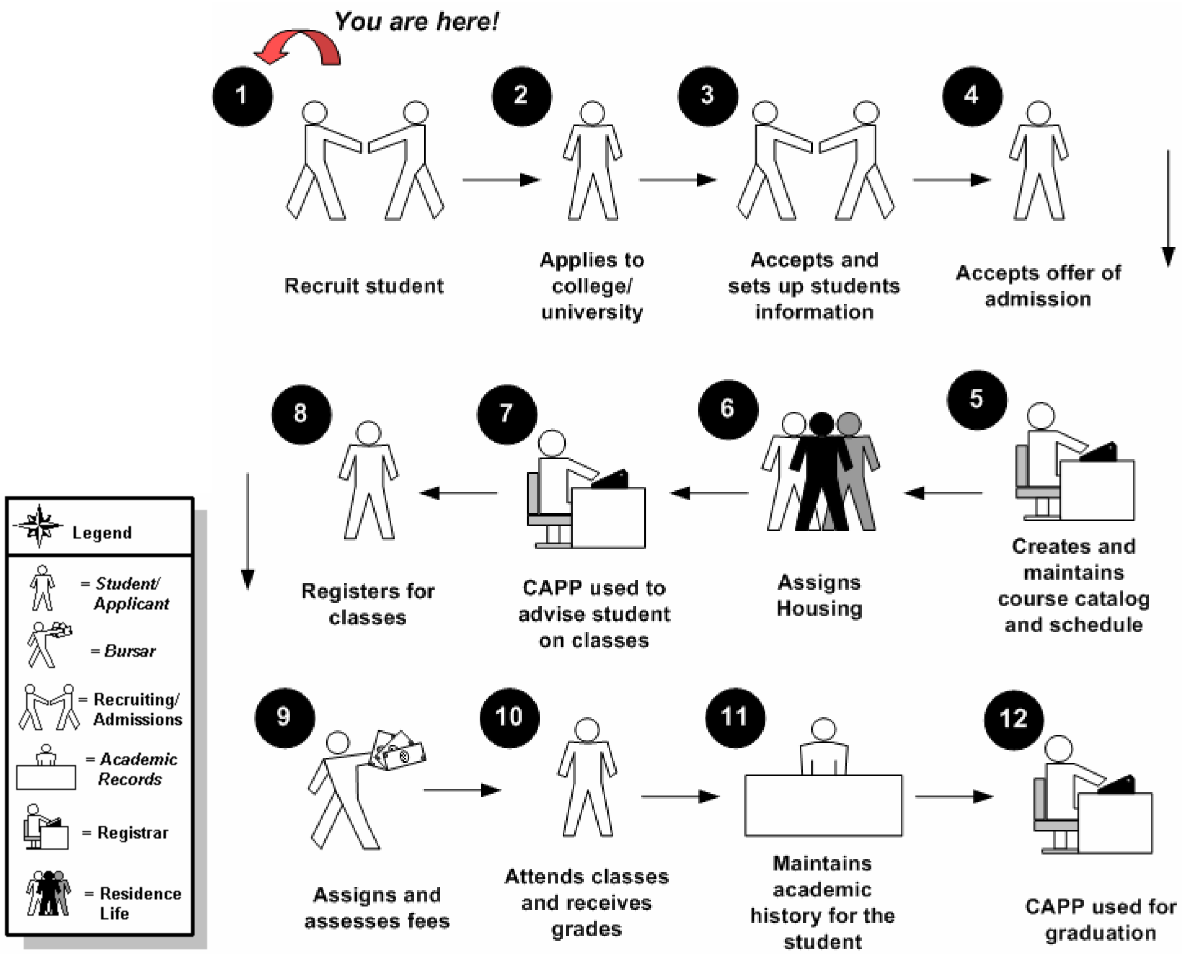
Jump to TOC

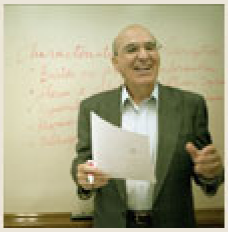
### Introduction

The recruiting process occurs at the beginning of the Student process.

### Flow diagram

This diagram highlights the processes used to perform Recruiting within the overall Student process.





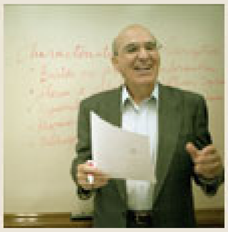
# Section A: Introduction

## Lesson: Process Introduction (Continued)

Jump to TOC

**About the process**

- The Recruiting office is generally responsible for performing all tasks associated with recruiting.
- An applicant is not considered a “student” in Banner until they accept an offer of admissions.
- While this workbook focuses on the recruiting process, keep in mind that the Recruiting office usually works in conjunction with the Admissions office.
- Personnel handling the task may vary by institution. For example, at smaller institutions, Admissions and Recruiting personnel may be combined.
- Maintaining information on students is an ongoing process that continues throughout the Student process, and could be handled by various personnel.



# Section A: Introduction

## Lesson: Terminology

Jump to TOC

**Applicant**

A potential student who seeks admission to an institution of higher education

**Freshman**

A first year student

**Prospect/recruit**

These are interchangeable terms which refer to a potential student. A prospect can potentially become an applicant. An applicant in turn, can be accepted for admission, at which point he or she becomes a student.

**Recruiter**

Person who performs the tasks associated with seeking to enroll new students.

**Student**

An applicant who has accepted an offer of admissions

**Test scores**

Results of standardized entrance exams, such as ACT, SAT, GRE, and GMAT. Test scores are often factored in admissions decisions and automated decision rules.

**Transfer student**

A student accepted for admissions from another institution

# Section B: Set Up

## Lesson: Overview

Jump to TOC

**Introduction**

The purpose of this section is to outline the setup process and detail the procedures to set up your Banner system. This section is broken into three main areas:

- Prior Setup
- Recruitment Module Setup
- Communication Plan Rules Setup

**Intended audience**

Personnel from offices responsible for entering recruiting information

**Objectives**

At the end of this section, you will be able to create the rules and set parameters used to process the data.

**Prerequisites**

To complete this section, you should have completed the Education Practices computer-based training (CBT) tutorial “Banner 7 Fundamentals,” or have equivalent experience navigating in the Banner system. You will need administrative rights to create the rules and set the validation codes in Banner.

You will also need to set up the validation forms outside of the Recruitment Module noted below prior to any setup that is specific to the Recruitment module.

# Section B: Set Up

## Lesson: Overview (Continued)

Jump to TOC

**Section contents**



Jump to TOC

**Validation and rules forms**

Before entering recruiting information, there are several forms and validations outside of Recruitment that need to be set or created.

The following validation forms play important roles in the Recruitment module; however, they will be setup prior to any setup that is specific to the Recruitment module.

Warning: Since these forms are shared with other modules, it is important that the appropriate members of the Student team be involved in their setup.

| Form Description | Banner Name |
|---|---|
| General Person Identification | SPAIDEN |
| General Person | SPAPERS |
| Source/Background Institution Code Validation Form | STVSBGI |
| Source/Background Institution Base | SOASBGI |
| Source/Background Institution Year | SOABGIY |
| Transfer Articulation Institution | SOABGTA |
| Term Code Validation | STVTERM |
| Major, Minor, Concentration Code Validation | STVMAJR |
| Level Code Validation | STVLEVL |
| Campus Code Validation | STVCAMP |
| Degree Code Validation | STVDEGC |
| Department Code Validation | STVDEPT |
| College Code Validation | STVCOLL |
| Student Type Code Validation | STVSTYP |
| Admission Type Code Validation | STVADMT |
| Withdrawal Reason Code Validation | STVWRSN |
| Admission Application Decision Code Validation | STVAPDC |
| Admission Application Status Code Validation | STVAPST |
| Enrollment Planning Service Code Validation | STVEPSC |
| Geographic Region Code Validation | STVGEOR |
| Geographic Region Division Code Validation | STVGEOD |
| Student Attribute Validation | STVATTS |

# Section B: Set Up

## Lesson: Rules and Validation Tables Outside of the Recruitment Module (Continued)

Jump to TOC

**Validation and rules forms, continued**

| Form Description | Banner Name |
|---|---|
| Cohort Code Validation | STVCHRT |
| Curriculum Rules | SOACURR |
| Curriculum Rules Control | SOACTRL |
| Residence Code Validation | STVRESD |
| Site Code Validation | STVSITE |
| Session Code Validation | STVSESS |
| Education Level Code Validation | STVEDLV |
| Education Goal Validation | STVEGOL |
| Admission Request Checklist Code Validation | STVADMR |
| Diploma Type Validation | STVDPLM |
| High School Subject Validation | STVSBJC |
| Institutional Honors Code Validation | STVHONR |
| Test Code Validation | STVTESC |
| Enrollment Verification Type Code Validation | STVEPRT |
| Test Form Validation | STVTEFR |
| Test Accommodation Validation | STVTEAC |
| Test Instrument Validation | STVTEIN |
| Comment Type Code Validation | STVCMTT |
| Originator Code Validation | STVORIG |
| Source Contact Person Type Code Validation | STVPTYP |
| Program Definition Rules | SMAPRLE |

**Examples**

Setup procedures for and descriptions of some of these forms are shown on the pages that follow.

Note: The Program Definition Rules Form (SMAPRLE) is included only for the purposes of a later exercise. This form may or may not be used by your institution.

# Section B: Set Up

## Lesson: Source/Background Institution Code Validation

Jump to TOC

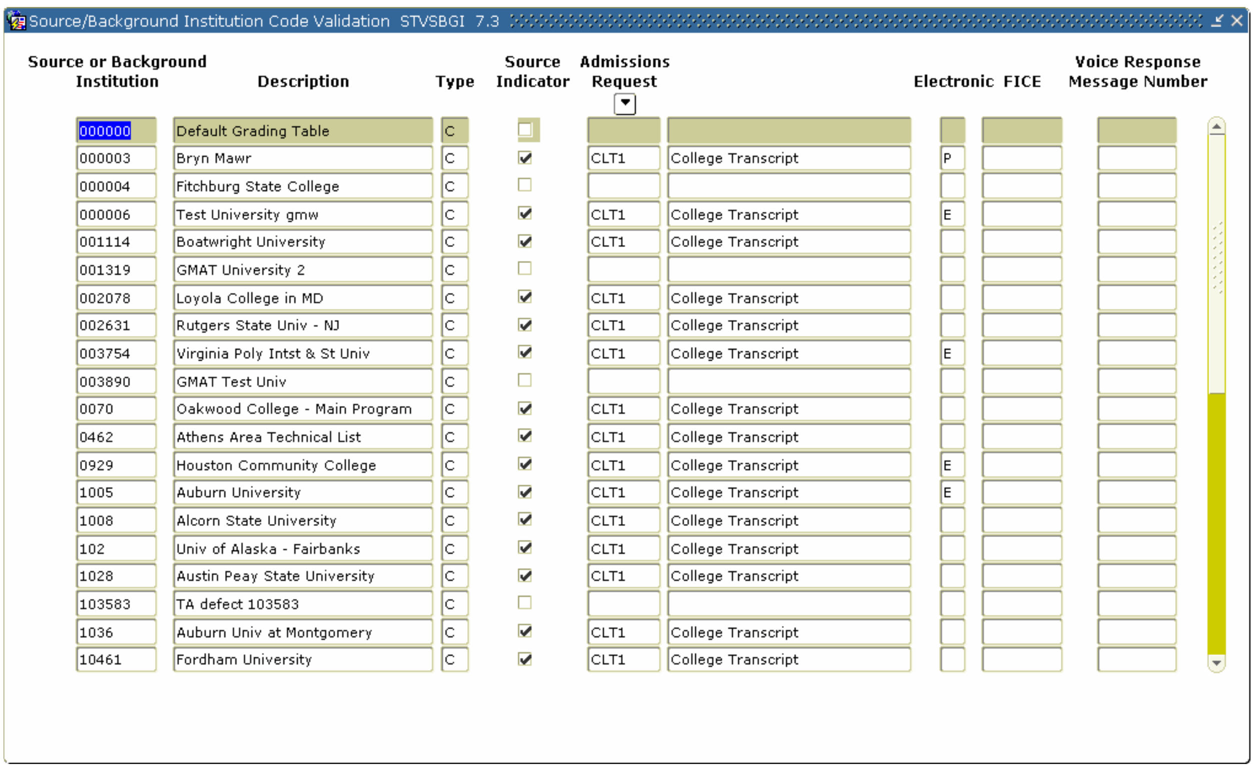
### Purpose

The Source/Background Institution Code Validation Form (STVSBGI) is used to create, update, insert, and delete source/background institution codes (e.g., *Harvard University*, *Yale University*, *Bryn Mawr College*).

Several forms in the Recruiting, Academic History, and Admissions modules use this form to validate the source/background institution codes. You can only create and update these codes on 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



Source/Background Institution Code Validation STVSBGI 7.3

| Source or Background Institution | Description | Type | Source Indicator | Admissions Request | | Electronic | FICE | Voice Response Message Number |
|---|---|---|---|---|---|---|---|---|
| 000000 | Default Grading Table | C | ☐ | | | | | |
| 000003 | Bryn Mawr | C | ☑ | CLT1 | College Transcript | P | | |
| 000004 | Fitchburg State College | C | ☐ | | | | | |
| 000006 | Test University gmw | C | ☑ | CLT1 | College Transcript | E | | |
| 001114 | Boatwright University | C | ☑ | CLT1 | College Transcript | | | |
| 001319 | GMAT University 2 | C | ☐ | | | | | |
| 002078 | Loyola College in MD | C | ☑ | CLT1 | College Transcript | | | |
| 002631 | Rutgers State Univ - NJ | C | ☑ | CLT1 | College Transcript | | | |
| 003754 | Virginia Poly Intst & St Univ | C | ☑ | CLT1 | College Transcript | E | | |
| 003890 | GMAT Test Univ | C | ☐ | | | | | |
| 0070 | Oakwood College - Main Program | C | ☑ | CLT1 | College Transcript | | | |
| 0462 | Athens Area Technical List | C | ☑ | CLT1 | College Transcript | | | |
| 0929 | Houston Community College | C | ☑ | CLT1 | College Transcript | E | | |
| 1005 | Auburn University | C | ☑ | CLT1 | College Transcript | E | | |
| 1008 | Alcorn State University | C | ☑ | CLT1 | College Transcript | | | |
| 102 | Univ of Alaska - Fairbanks | C | ☑ | CLT1 | College Transcript | | | |
| 1028 | Austin Peay State University | C | ☑ | CLT1 | College Transcript | | | |
| 103583 | TA defect 103583 | C | ☐ | | | | | |
| 1036 | Auburn Univ at Montgomery | C | ☑ | CLT1 | College Transcript | | | |
| 10461 | Fordham University | C | ☑ | CLT1 | College Transcript | | | |

# Section B: Set Up

## Lesson: Source/Background Institution Code Validation (Continued)

Jump to TOC

**Procedure**

Follow these steps to set up source/background institution codes.

| Step | Action |
|---|---|
| 1 | Access the Source/Background Institution Code Validation Form (STVSBGI). |
| 2 | Execute a query to view all values. |
| 3 | Perform an **Insert Record** function. |
| 4 | Enter [*Your Initials*]*1* in the **Source or Background Institution** field to create a college code.<br><br>Example: *ABC1* |
| 5 | Enter [*Your Initials*] *College* in the **Description** field.<br><br>Example: *ABC College* |
| 6 | Enter *C* in the **Type** field.<br><br>Note: The **Type** field is used to identify if the source is a high school (H), college (C), or source-only (S). |
| 7 | Select the **Source Indicator** checkbox. |
| 8 | In the **Admissions Request** field, enter the code *CLT1*. |
| 9 | Click the **Save** icon. |
| 10 | Perform another **Insert Record** function. |
| 11 | Enter [*Your Initials*]*2* in the **Source or Background Institution** field to create a high school code.<br><br>Example: *ABC2* |
| 12 | Enter [*Your Initials*] *High School* in the **Description** field.<br><br>Example: *ABC High School* |
| 13 | Enter *H* in the **Type** field. |
| 14 | Select the **Source Indicator** checkbox. |
| 15 | Enter the code *HST1* in the **Admissions Request** field. |
| 16 | Click the **Save** icon. |



**Procedure, continued**

| Step | Action |
|---|---|
| 17 | Perform an **Insert Record** function. |
| 18 | Enter [*Your Initials*]*3* in the **Source or Background Institution** field to create a source code.<br><br>Example: *ABC3* |
| 19 | Enter [*Your initials*] *Source* in the **Description** field.<br><br>Example: *ABC Source* |
| 20 | Enter *S* in the **Type** field. |
| 21 | Select the **Source Indicator** checkbox. |
| 22 | Click the **Save** icon. |
| 23 | Click the **Exit** icon. |

# Section B: Set Up

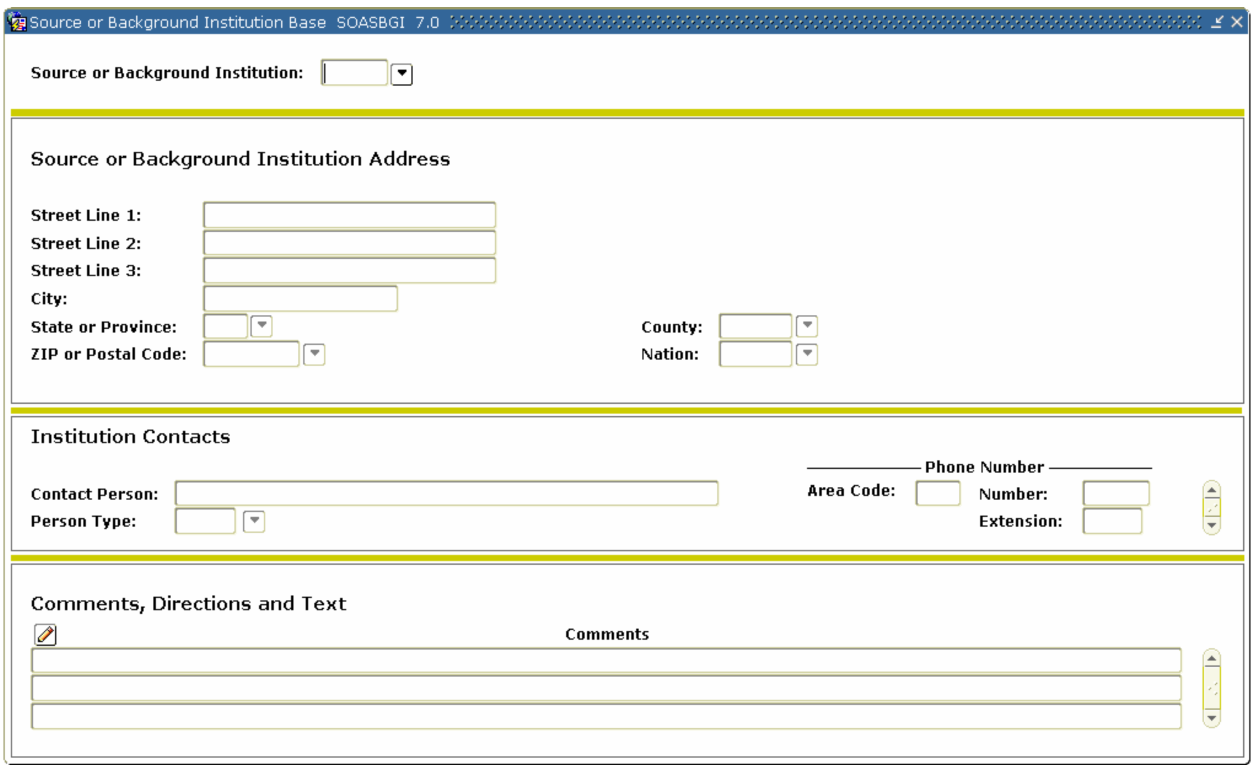
## Lesson: Source/Background Institution Base

Jump to TOC

### Purpose

The Source/Background Institution Base Form (SOASBGI) 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.

### Banner form





Jump to TOC

**Procedure**

Follow these steps to establish source/background information.

| Step | Action |
|---|---|
| 1 | Access the Source/Background Institution Base Form (SOASBGI). |
| 2 | Enter the code [*Your Initials*]*1* in the **Source/Background Institution** field for the college you created in a previous exercise.<br><br><u>Result</u>: This populates the institution field. |
| 3 | Perform a **Next Block** function to navigate to the Source or Background Institution Address block. |
| 4 | Establish an address for the college by filling in the **Street Line**, **City**, **State or Province**, and **Zip or Postal Code** fields.<br><br><u>Note</u>: You can use the down arrow to select a ZIP/postal code. |
| 5 | Click the **Save** icon. |
| 6 | Perform a **Next Block** function to navigate to the Institution Contacts window. |
| 7 | Enter a person's name in the **Contact Person** field. |
| 8 | Click the down arrow next to the **Person Type** field to view the List of Values. |
| 9 | Select a person type for the contact. |
| 10 | Click **OK**. |
| 11 | Assign a telephone number (area code, number, and extension) for the contact person. |
| 12 | Click the **Save** icon. |
| 13 | Perform a **Rollback** function to return to the key block. |
| 14 | Enter the high school code [*Your Initials*]*2* in the **Source or Background Institution** field for the high school created in a previous exercise.<br><br><u>Result</u>: This populates the institution field. |
| 15 | Perform a **Next Block** function to navigate to the Source/Background Institution Address block. |



Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 16 | Establish an address for the high school by filling in the **Street Line**, **City**, **State or Province**, and **Zip or Postal Code** fields.<br><br>Note: To find your zip/postal code, click the down arrow and select your zip/postal code by double-clicking.<br><br>Note: You can click the down arrow next to the **State or Province**, **County**, and **Nation** fields to select from the List of Values. |
| 17 | Click the **Save** icon. |
| 18 | Perform a **Next Block** function to navigate to the Institution Contacts window. |
| 19 | Enter a person’s name in the **Contact Person** field. |
| 20 | Click the down arrow next to the **Person Type** field to view the List of Values. |
| 21 | Select a person type for the contact. |
| 22 | Click **OK**. |
| 23 | Assign a telephone number (area code, number, and extension) for the contact person. |
| 24 | Click the **Save** icon. |
| 25 | Click the **Exit** icon. |

# Section B: Set Up

## Lesson: Source/Background Institution Year

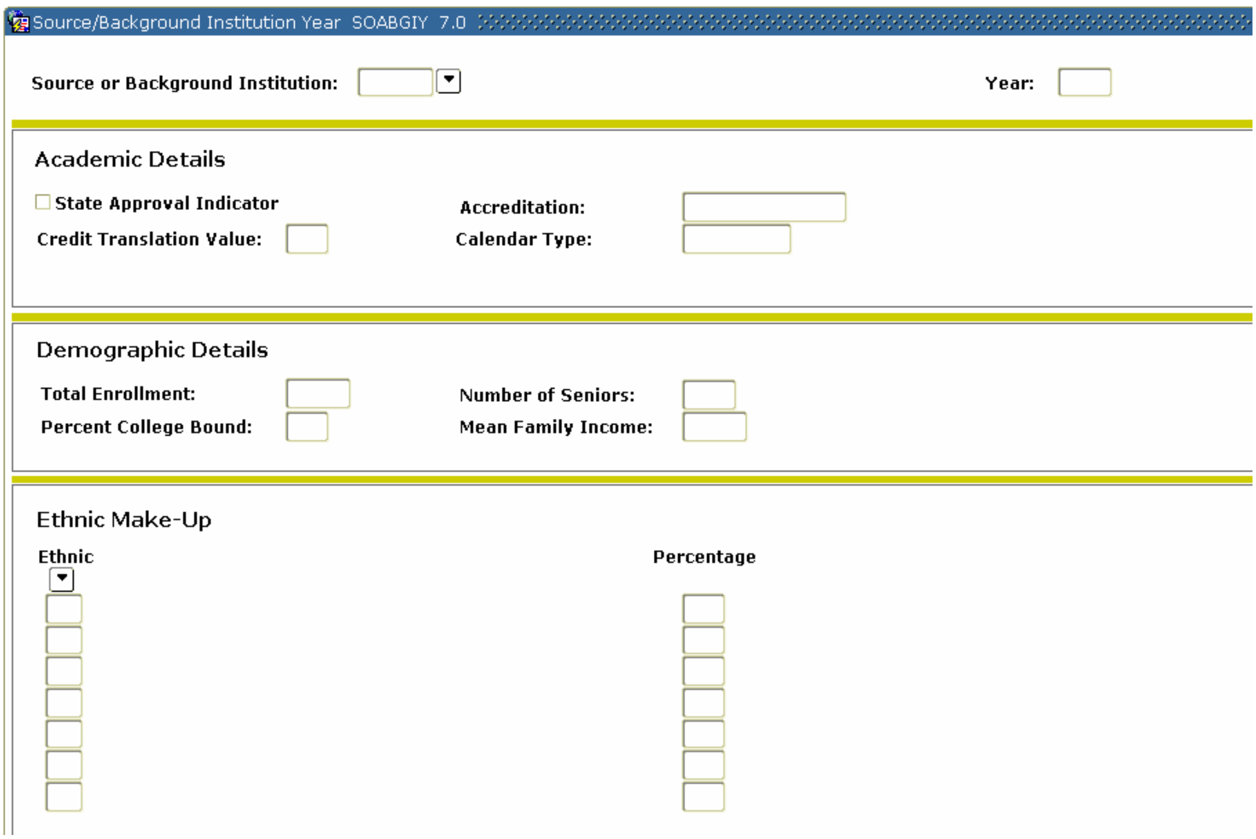
Jump to TOC

**Purpose**

The Source/Background Institution Year Form (SOABGIY) is used to capture yearly information about a source or background institution. Much of the information captured is not validated to allow for flexibility. All of the data are dependent on calendar year, providing a historical record of the information.

Note: The Source/Background Institution Base Form (SOASBGI) must be established prior to using this form.

**Banner form**



Source/Background Institution Year SOABGIY 7.0

Source or Background Institution:

Year:

Academic Details

State Approval Indicator

Accreditation:

Credit Translation Value:

Calendar Type:

Demographic Details

Total Enrollment:

Number of Seniors:

Percent College Bound:

Mean Family Income:

Ethnic Make-Up

Ethnic

Percentage

# Section B: Set Up

## Lesson: Source/Background Institution Year (Continued)

Jump to TOC

**Procedure**

Follow these steps to complete the process of establishing source/background information.

| Step | Action |
|---|---|
| 1 | Access the Source/Background Institution Year Form (SOABGIY). |
| 2 | Enter the high school code [*Your Initials*]*2* in the **Source/Background Institution** field for the high school you created in a previous exercise.<br><br>Result: This auto-populates the institution field. |
| 3 | Enter the current year in the **Year** field. |
| 4 | Perform a **Next Block** function to navigate to the Academic Details block. |
| 5 | Identify a calendar type (semester or quarter) in the **Calendar Type** field. |
| 6 | Click the **Save** icon. |
| 7 | Perform a **Next Block** function to navigate to the Demographic Details block. |
| 8 | Enter a figure in the **Total Enrollment** field. |
| 9 | Click the **Save** icon. |
| 10 | Click the **Exit** icon. |

# Section B: Set Up

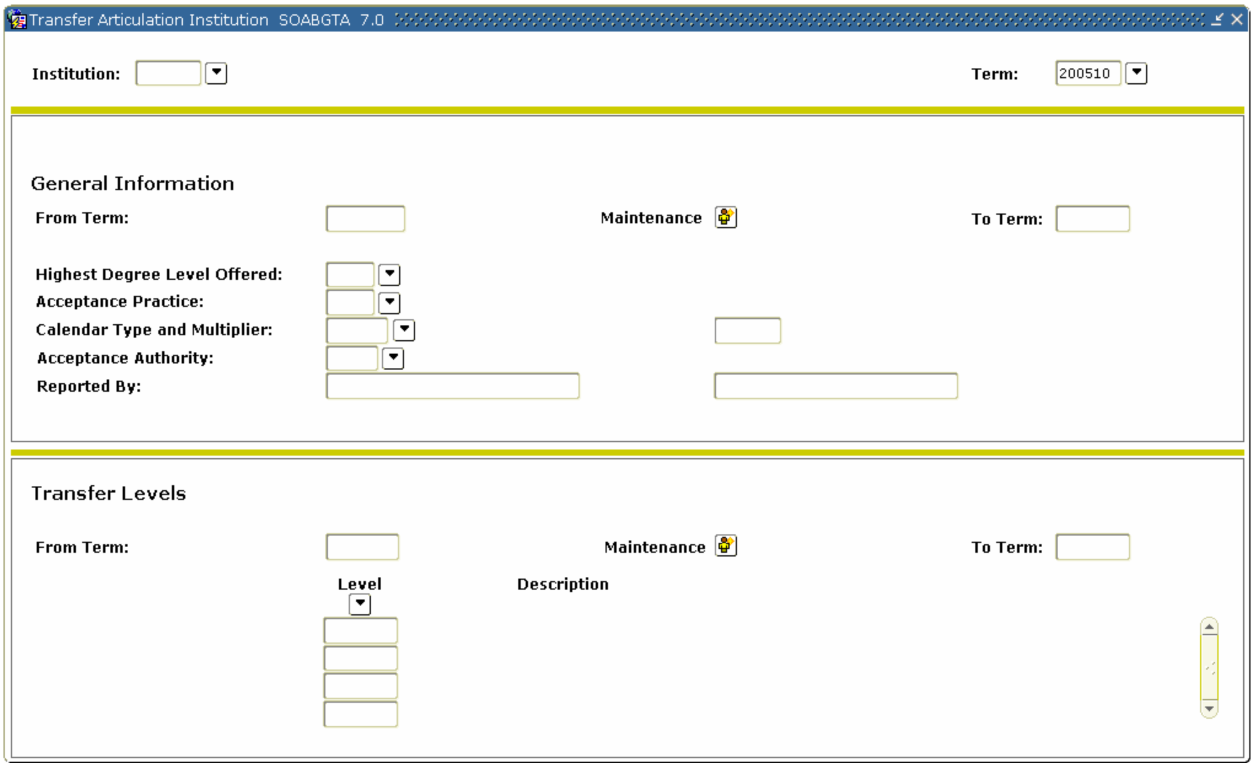
## Lesson: Transfer Articulation Institution

Jump to TOC

**Purpose**

The Transfer Articulation Institution Form (SOABGTA) is an additional form that can be used to describe high school information. It contains a block that has a repeating table of high school characteristics defined by the institution. A number of institutions have found it useful to identify characteristics of certain high schools to help with specialized recruiting or requirements needs. Examples are schools that do not provide a rank in class for their graduates or schools in which a high percentage of students attain high SAT or ACT scores.

**Banner form**



# Section B: Set Up

## Lesson: Residence Code Validation

Jump to TOC

**Purpose**

The Residence Code Validation Form (STVRESD) is used to maintain codes for residency (e.g., *Foreign*, *Out-of-State Resident*, *In-State Resident*). Other forms use this form to validate the residency codes. You may only create or update these codes from this form.

<u>Note</u>: Each participant in this class must create a different residence code.

**Banner form**

Residence Code Validation STVRESD 7.0

| Code | Description | In State/ Prov | EDI Equiv | VR Msg | Sys Req | Activity Date |
|---|---|---|---|---|---|---|
| 0 | Undeclared | ☑ | | | ☑ | 31-MAY-1994 |
| 1 | Margy Test | ☑ | | | ☐ | 04-MAY-2006 |
| A | Reciprocity Out of State | ☐ | | | ☐ | 07-JAN-1991 |
| F | Foreign | ☐ | | | ☐ | 01-MAY-1987 |
| K | In State | ☑ | | | ☐ | 28-JUL-2004 |
| M | Military Out of State | ☐ | | | ☐ | 07-JAN-1991 |
| O | Out of state Resident | ☐ | | | ☐ | 07-JAN-1991 |
| R | In state Resident | ☑ | | | ☐ | 07-JAN-1991 |
| | | ☐ | | | ☐ | |
| | | ☐ | | | ☐ | |



Jump to TOC

**Procedure**

Follow these steps to complete the process.

| Step | Action |
|---|---|
| 1 | Access the Residence Code Validation Form (STVRESD). |
| 2 | Perform an **Insert Record** function. |
| 3 | Enter a unique residence code in the **Code** field.<br><br><u>Hint</u>: Select a character from *A* to *Z*. |
| 4 | Enter your name in the **Description** field. |
| 5 | Select the **In State/Prov** checkbox.<br><br><u>Note</u>: When the **In State/Prov** checkbox is selected, this indicates that the code represents a person who is a resident of the state or province. |
| 6 | Click the **Save** icon. |
| 7 | Click the **Exit** icon. |

# Section B: Set Up

## Lesson: Program Definition Rules

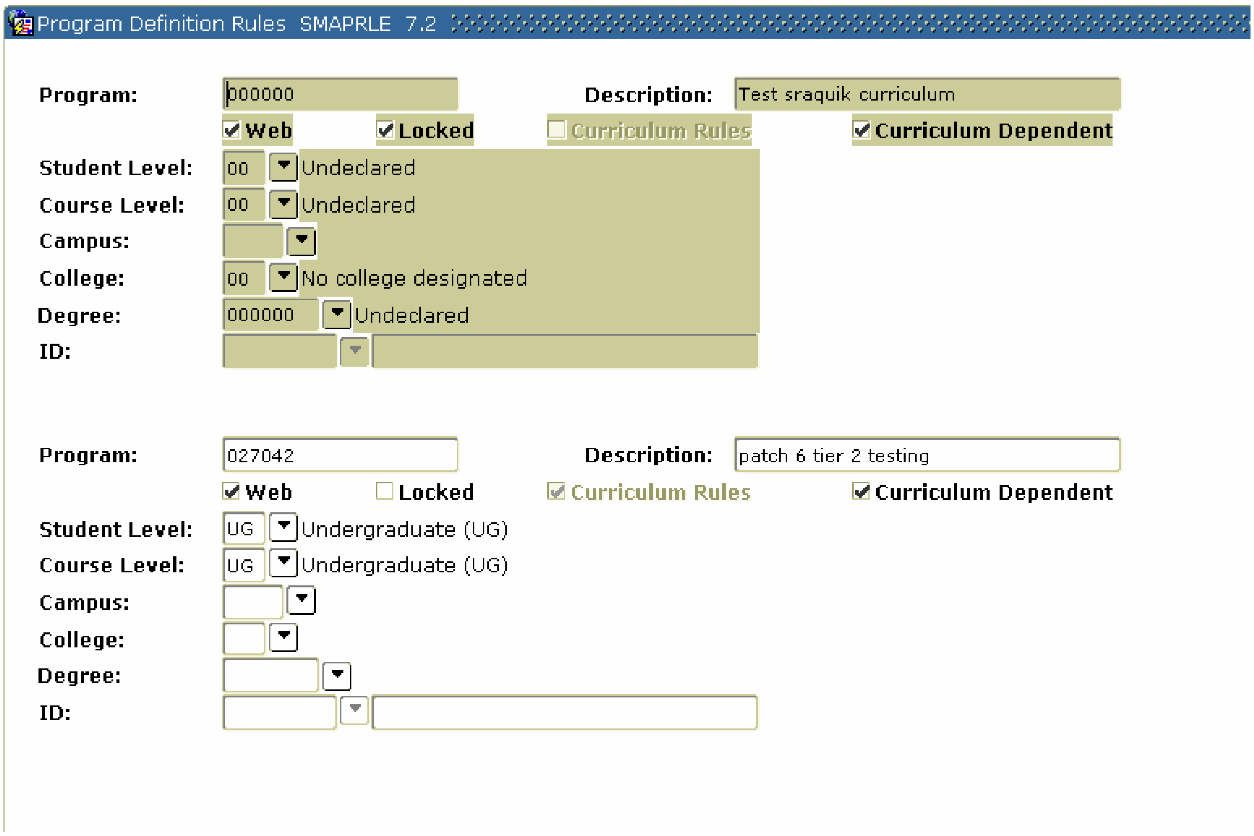
Jump to TOC

### Purpose

The Program Definition Rules Form (SMAPRLE) is used to create program codes.

Note: This is a generic program code to which multiple majors will be attached in a later exercise. This procedure is included in this workbook for this reason.

### Banner form




### Procedure

Follow these steps to complete the process.

| Step | Action |
|---|---|
| 1 | Access the Program Definition Rules Form (SMAPRLE). |
| 2 | Perform an **Insert Record** function. |



Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 3 | Enter [*Your Initials*] in the **Program** field. This is the program code.<br><br><u>Example</u>: *ABC* |
| 4 | Enter [*Your Initials*] *Program* in the **Description** field.<br><br><u>Example</u>: *ABC Program* |
| 5 | Leave the **Locked** checkbox empty. |
| 6 | Select the **Curriculum Dependent** check box. |
| 7 | Click the down arrow next to the **Student Level** field to access the Level Code Validation window. |
| 8 | Select a program level (i.e., the level of student interested in attending your institution).<br><br><u>Examples</u>: *Undergraduate*, *Graduate*, *Law* |
| 9 | Click **OK**. |
| 10 | Click the down arrow next to the **Course Level** field to access the Level Code Validation window.<br><br><u>Note</u>: The Course Level is the level of the course work normally counted toward completion of the program you're defining. |
| 11 | Select a level. |
| 12 | Click **OK**. |
| 13 | Leave the **Campus** field empty. The campus is only required if the program you're defining is available only to students on one campus of your institution. |
| 14 | Click the down arrow next to the **College** field to access the College Validation window. |
| 15 | Select a college. |
| 16 | Click **OK**. |
| 17 | Click the down arrow next to the **Degree** field to access the Degree Validation window. |
| 18 | Select a degree, for example, Bachelor of Arts. |
| 19 | Click **OK**. |
| 20 | Leave the **ID** field empty. |
| 21 | Click the **Save** icon. |
| 22 | Click the **Exit** icon. |

# Section B: Set Up

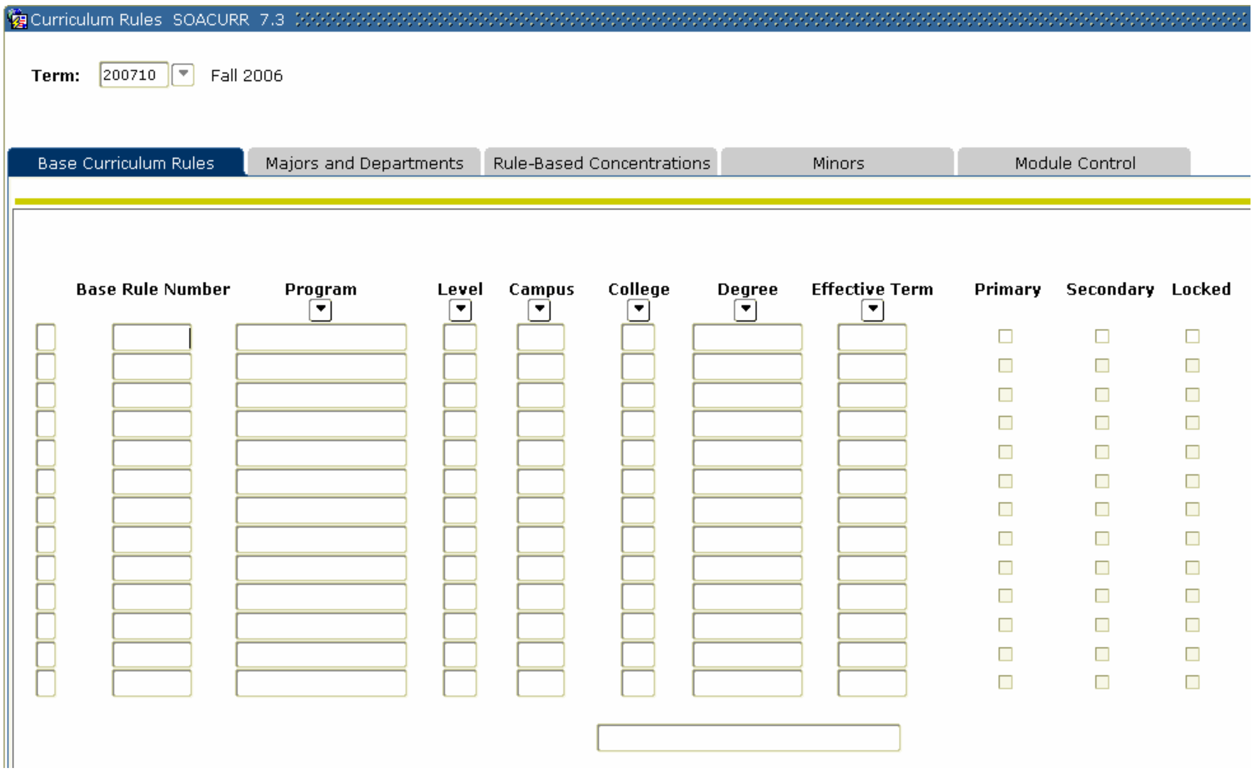
## Lesson: Curriculum Rules

Jump to TOC

**Purpose**

The Curriculum Rules Form (SOACURR) is used to view or create curriculum.

**Banner form**





Jump to TOC

**Procedure**

Follow these steps to complete the process.

| Step | Action |
|---|---|
| 1 | Access the Curriculum Rules Form (SOACURR). |
| 2 | Leave the **Term** field empty. |
| 3 | Perform a **Next Block** function. |
| 4 | Execute a query. |
| 5 | Perform an **Insert Record** function. |
| 6 | Click the down arrow next to the **Program** field to query the program code [*Your Initials*] created in the previous exercise.<br><br><u>Result</u>: The **Level**, **College**, and **Degree** fields will auto-populate. |
| 7 | Navigate to the **Effective Term** field. |
| 8 | Enter the beginning of time (000000), or the first term that the new program is to be in effect. |
| 9 | Select the **Primary** and **Secondary** checkboxes. |
| 10 | Lock the base curriculum rule by selecting the **Lock** checkbox. |
| 11 | Click the **Save** icon. |
| 12 | Click the **Majors and Departments** tab. |
| 13 | Click the down arrow under the **Major** field to view the List of Values. |
| 14 | Select *Anthropology*. |
| 15 | Click **OK**. |
| 16 | Click the **Save** icon. |
| 17 | Use the down arrow on the keyboard to move to the next record/line to attach a second major. |
| 18 | Click the down arrow under the **Major** field to view the List of Values. |
| 19 | Select *English*. |
| 20 | Click **OK**. |
| 21 | Use the down arrow on the keyboard to move to the next record/line to attach a third major. |
| 22 | Click the down arrow under the **Major** field to view the List of Values. |
| 23 | Select *Mathematics*. |
| 24 | Click **OK**. |
| 25 | Click the **Save** icon. |

**Procedure, continued**

| Step | Action |
|---|---|
| 26 | Select the **Module Control** tab.<br><br><u>Note</u>: Indicators default to **On** for each module for the curriculum rule. The **No** option is used to retire use of the curriculum rule for a module. |

# Section B: Set Up

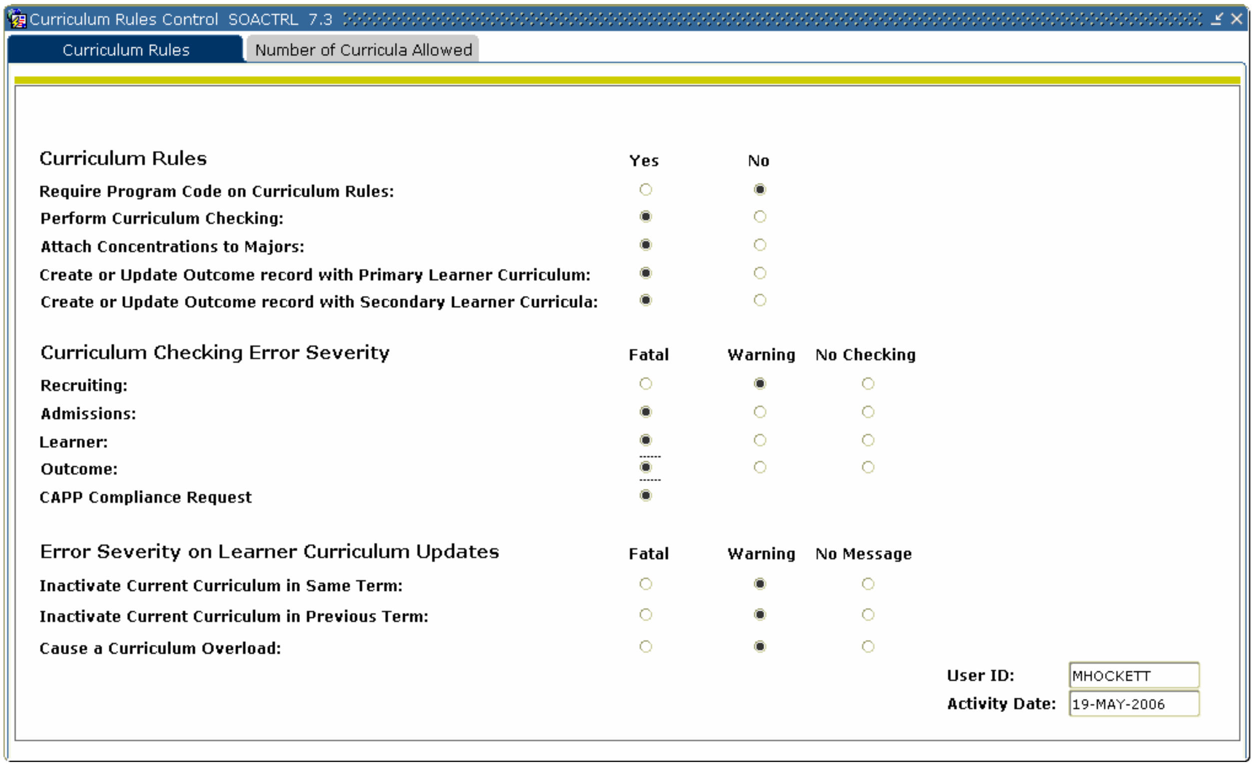
## Lesson: Curriculum Rules Control

Jump to TOC

### Purpose

The Curriculum Rules Control Form (SOACTRL) uses radio groups to determine: 1) if/how various areas related to curriculum are used and 2) to set the severity level of error checking by module if using curriculum rules.

### Banner form



Curriculum Rules Control SOACTRL 7.3

Curriculum Rules | Number of Curricula Allowed

Curriculum Rules — Yes / No
Require Program Code on Curriculum Rules:
Perform Curriculum Checking:
Attach Concentrations to Majors:
Create or Update Outcome record with Primary Learner Curriculum:
Create or Update Outcome record with Secondary Learner Curricula:

Curriculum Checking Error Severity — Fatal / Warning / No Checking
Recruiting:
Admissions:
Learner:
Outcome:
CAPP Compliance Request

Error Severity on Learner Curriculum Updates — Fatal / Warning / No Message
Inactivate Current Curriculum in Same Term:
Inactivate Current Curriculum in Previous Term:
Cause a Curriculum Overload:

User ID: MHOCKETT
Activity Date: 19-MAY-2006



Jump to TOC

**Procedure**

Follow these steps to complete the process.

| Step | Action |
|---|---|
| 1 | Access the Curriculum Rules Control Form (SOACTRL). |
| 2 | Verify that the **Perform Curriculum Checking** button is set to *Yes.* |
| 3 | Further down on the form, verify that the **Curriculum Checking Error Severity** radio button for Recruiting is set at *Warning* and the radio buttons for Admissions, Learner, and Outcome are set at *Fatal.*<br><br>Note:  The Error Severity section of the form sets up how you want to check your curriculum rules by module.  The error severity options are "Fatal" (the system will not allow an invalid curriculum combination to be used, "Warning" (a message is generated that the combination is invalid, and the user is given the option to continue or cancel), and "No Checking" (the rules are not checked, and no message is displayed).<br><br>You can use Warning, instead of Fatal, for curriculum checking in the Recruiting module; because students might not give accurate information about programs they think they would be interested in pursuing. |
| 4 | Click the **Save** icon (if changes were needed). |
| 5 | Click the **Exit** icon. |

# Section B: Set Up

## Lesson: Validation Forms Needed for the Recruitment Module

Jump to TOC

**Purpose**

These validation forms are needed for the Recruitment module. Review these forms and practice entering information in each. Descriptions of each form are shown on the pages that follow.

Note: A setup procedure for the Recruiter Code Validation Form is shown on page 31.

| Form Description | Banner Name |
|---|---|
| Contact Type Code Validation | STVCTYP |
| Address Type Code Validation | STVATYP |
| Recruiter Code Validation | STVRECR |
| Recruit Type Validation | STVRTYP |
| Originator Code Validation | STVORIG |
| Web Prospect How I Learned About Validation | STVLEND |
| Recruiting Internal Status Code Validation | STVRSTA |
| Appointment Result Code Validation | STVRSLT |
| Comment Type Code Validation | STVCMTT |
| Outside Interest Code Validation | STVINTS |

# Section B: Set Up

## Lesson: Contact Type Code Validation

Jump to TOC

**Purpose**

The Contact Type Code Validation Form (STVCTYP)

**Banner form**

Contact Type Code Validation STVCTYP 7.0

| Code | Description | Activity Date |
|---|---|---|
| CMP | Campus Visit | 05-JAN-1988 |
| CNN | College Night | 30-AUG-2004 |
| CNS | Counselor Visit | 25-MAR-1987 |
| DLL | Dean's List Letter | 29-APR-1987 |
| FA1 | CSS Profile FA Application | 02-AUG-2004 |
| FA2 | EDE FA Application | 02-AUG-2004 |
| FIN | Financial Aid Tape | 04-FEB-1995 |
| FUL | Follow-up Letter | 29-APR-1987 |
| HLL | Honors List Letter | 29-JAN-1991 |
| IN1 | Interview One | 13-APR-1987 |
| IN2 | Interview Two | 03-JAN-1995 |
| INP | In-person | 25-MAR-1987 |
| KM | Email | 02-AUG-2004 |
| MH | Testing | 15-FEB-2006 |
| MIL | Military Interest Letter | 03-JAN-1995 |
| MLL | Merit List Letter | 29-APR-1987 |
| PGL | Univ Pres Greeting Letter | 22-MAY-1987 |
| PHN | Phone Call | 25-MAR-1987 |
| PR | PocketRecruiter Event | 06-OCT-2004 |
| TAP | Test Score Tape | 09-OCT-1987 |
| WEB | Web Contact | 30-JUN-2004 |

# Section B: Set Up

# Lesson: Address Type Code Validation

Jump to TOC

## Purpose

The Address Type Code Validation Form (STVATYP)

## Banner form

Address Type Code Validation STVATYP 7.0

| Address Type | Description | Telephone Type | Description | System Required | Activity Date |
|---|---|---|---|---|---|
| BI | Billing | BI | Billing | ☑ | 13-OCT-2005 |
| BU | Business | BU | Business or work | ☑ | 03-MAY-1991 |
| DA | Dormitory Address | RH | Residence Hall | ☐ | 01-JUL-2004 |
| DP | Diploma | | | ☐ | 15-MAR-2006 |
| EM | Emergency Contact | EMER | Emergency Contact | ☐ | 30-MAR-1995 |
| FA | Firm Address | FA | Firm Address | ☐ | 01-AUG-1991 |
| FO | Faculty Office | FO | Faculty Office | ☐ | 14-SEP-2004 |
| FR | 1042 Foreign Address | | | ☐ | 31-AUG-2004 |
| HO | Home Address | | | ☐ | 25-JAN-2005 |
| HQ | Corporate Headquarters | HQ | Corporate Headquarters | ☐ | 03-JUN-1990 |
| LL | Loc Mgt | | | ☐ | 22-FEB-2005 |
| MA | Mailing | MA | Mailing | ☑ | 10-AUG-2005 |
| MC | Mailing | | | ☐ | 19-JAN-2006 |
| MG | Matching Gift Address | MG | Matching Gift | ☐ | 07-JAN-1991 |
| P1 | Parent 1 | P1 | Parent 1 | ☐ | 03-JAN-1995 |
| P2 | Parent 2 | P2 | Parent 2 | ☐ | 03-JAN-1995 |
| P3 | Parent 3 | P3 | Parent 3 | ☐ | 03-JAN-1995 |
| P4 | Parent 4 | P4 | Parent 4 | ☐ | 03-JAN-1995 |
| PA | Parents | PA | Parents | ☑ | 16-MAR-2006 |
| PO | Order Address | | | ☐ | 13-DEC-2005 |
| PR | Permanent | PR | Permanent | ☐ | 08-AUG-2005 |
| RH | Residence Hall | RH | Residence Hall | ☐ | 06-APR-1995 |

# Section B: Set Up

## Lesson: Recruiter Code Validation

Jump to TOC

**Purpose**

The Recruiter Code Validation Form (STVRECR) is used to create, update, insert, and delete recruiter codes (e.g., East Coast Recruiter, Central Recruiter, and High School Recruiter). Several modules use this form to validate the recruiter codes. You can only create and update these codes on this form.

**Banner form**

Recruiter Code Validation STVRECR 7.0

| Code | Description | System Req | Activity Date |
|---|---|---|---|
| 000 | Unassigned | ☑ | 24-JUN-1991 |
| BB | Bryan Bowman | ☐ | 06-JAN-1995 |
| CAM | Campus | ☐ | 06-JAN-1995 |
| CEN | Central | ☐ | 06-JAN-1995 |
| CJ | Cheryl James | ☐ | 06-JAN-1995 |
| DM | Douglas Mason | ☐ | 06-JAN-1995 |
| EAC | East Coast | ☐ | 06-JAN-1995 |
| HIS | High School | ☐ | 06-JAN-1995 |
| KM | Kamakshi Mallikarjun | ☐ | 02-AUG-2004 |
| MAH | Margy Hockett | ☐ | 20-APR-2006 |
| PJL | Pat's recruiter | ☐ | 03-MAR-2006 |
| RL | Raymond Lawrence | ☐ | 06-JAN-1995 |
| SH | Susan Hughes | ☐ | 06-JAN-1995 |
| TC | Tony Carrithers | ☐ | 06-JAN-1995 |
| WEC | West Coast | ☐ | 06-JAN-1995 |
| WWZ | Bill Zimmer | ☐ | 13-APR-2004 |
| | | ☐ | |
| | | ☐ | |

# Section B: Set Up

## Lesson: Recruiter Code Validation (Continued)

Jump to TOC

**Procedure**

Follow these steps to complete the process.

| Step | Action |
|---|---|
| 1 | Access the Recruiter Code Validation Form (STVRECR). |
| 2 | Perform an **Insert Record** function. |
| 3 | Enter your initials in the **Code** field. |
| 4 | Enter your name in the **Description** field. |
| 5 | Leave the **System Req** checkbox empty. |
| 6 | Leave the **Activity Date** field empty.<br><br>Note: The field auto-populates with the current date when you save. |
| 7 | Click the **Save** icon. |
| 8 | Click the **Exit** icon. |

# Section B: Set Up

## Lesson: Recruiter Code Validation

Jump to TOC

**Purpose**

The Recruit Type Validation Form (STVRTYP)

**Banner form**

Recruit Type Validation STVRTYP 7.0

| Code | Description | Activity Date |
|---|---|---|
| 10 | Class of 2010 | 02-AUG-2004 |
| 95 | Class of '95 | 06-JAN-1995 |
| 96 | Class of '96 | 06-JAN-1995 |
| 97 | Class of '97 | 06-JAN-1995 |
| 98 | Class of '98 | 06-JAN-1995 |
| FR | Former | 06-JAN-1995 |
| NR | New | 06-JAN-1995 |

# Section B: Set Up

## Lesson: Originator Code Validation

Jump to TOC

**Purpose**

The Originator Code Validation Form (STVORIG)

**Banner form**

Originator Code Validation STVORIG 7.0

| Code | Description | Activity Date |
|---|---|---|
| ACCT | Student Accounts Office | 26-MAR-1987 |
| ADMS | Admissions Office | 26-MAR-1987 |
| ALDR | Director of Alumni Relations | 05-JUN-1990 |
| ANFD | Annual Fund Office | 03-JUN-1990 |
| APIO | API Test Code | 16-JUN-2004 |
| AUTO | Generated Automatically | 31-MAR-1988 |
| BUSO | Bursar's Office | 09-OCT-1987 |
| CART | College of Arts and Sciences | 09-DEC-2003 |
| CCON | Capital Consultant | 03-JUN-1990 |
| CORG | Corporate Giving Office | 03-JUN-1990 |
| COUN | Counseling Center | 01-MAY-1987 |
| DEVD | Director of Development | 05-JUN-1990 |
| DOFI | Dean of Instruction | 01-MAY-1987 |
| DOFS | Dean of Students | 01-MAY-1987 |
| EDFL | Sch Ed Fellowship Office | 09-DEC-2003 |
| EDUC | School of Education | 09-DEC-2003 |
| FAID | Financial Aid Office | 01-NOV-1989 |
| FINO | Finance and Billing | 03-MAR-1992 |
| KM | Dept of Music | 02-AUG-2004 |
| LIBR | Library Circulation Area | 12-MAR-1987 |
| MAJG | Major Gifts Office | 03-JUN-1990 |
| MATH | Department of Mathematics | 12-MAR-1987 |
| PHY1 | Physical Education - Football | 12-MAR-1987 |

# Section B: Set Up

## Lesson: Web Prospect How I Learned About Validation

◀ Jump to TOC

**Purpose**

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

**Banner form**

Web Prospect How I Learned About Validation STVLEND 7.0

| Code | Description | Activity Date |
|---|---|---|
| FRIEND | Friend | 20-NOV-2003 |
| GUIDANCE | Guidance Counselor | 19-AUG-2004 |
| INTERNET | Web Page | 20-NOV-2003 |
| NEWS | Newpaper | 20-NOV-2003 |
| PATL | Pat's test for reports | 03-MAR-2006 |
| PORTAL | College Portal | 02-AUG-2004 |

# Section B: Set Up

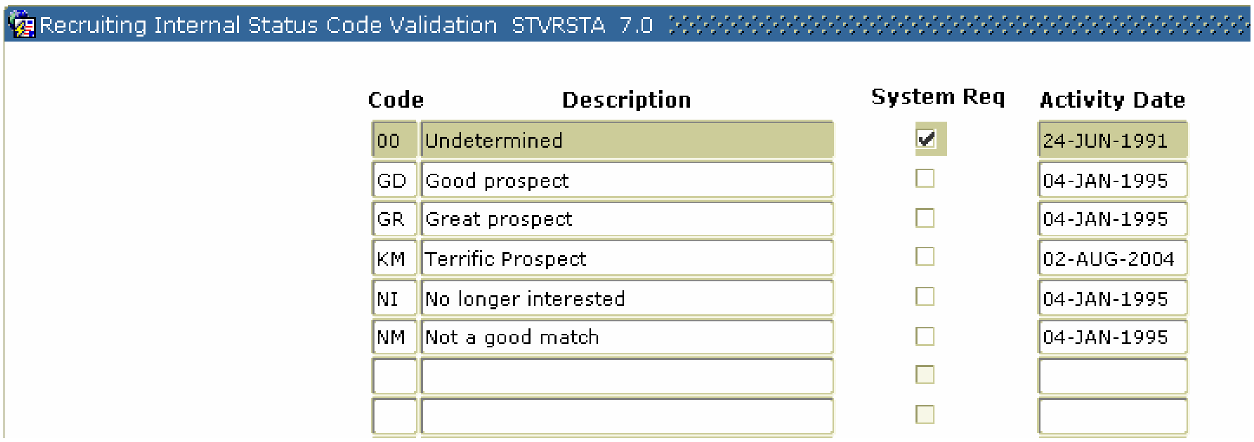
## Lesson: Recruiting Internal Status Code Validation

Jump to TOC

**Purpose**

The Recruiting Internal Status Code Validation Form (STVRSTA)

**Banner form**



Recruiting Internal Status Code Validation STVRSTA 7.0

| Code | Description | System Req | Activity Date |
|---|---|---|---|
| 00 | Undetermined | ☑ | 24-JUN-1991 |
| GD | Good prospect | ☐ | 04-JAN-1995 |
| GR | Great prospect | ☐ | 04-JAN-1995 |
| KM | Terrific Prospect | ☐ | 02-AUG-2004 |
| NI | No longer interested | ☐ | 04-JAN-1995 |
| NM | Not a good match | ☐ | 04-JAN-1995 |
| | | ☐ | |
| | | ☐ | |

# Section B: Set Up

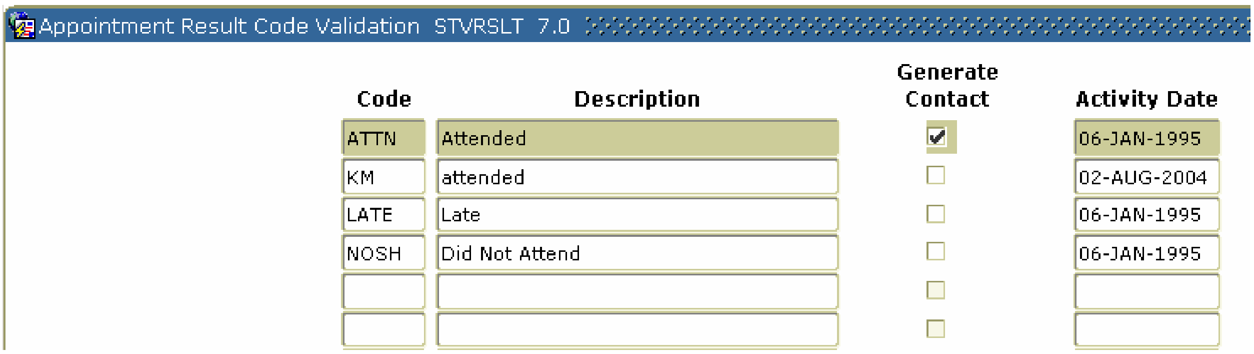
## Lesson: Appointment Result Code Validation

Jump to TOC

**Purpose**

The Appointment Result Code Validation Form (STVRSLT)

**Banner form**



Appointment Result Code Validation STVRSLT 7.0

| Code | Description | Generate Contact | Activity Date |
|---|---|---|---|
| ATTN | Attended | ☑ | 06-JAN-1995 |
| KM | attended | ☐ | 02-AUG-2004 |
| LATE | Late | ☐ | 06-JAN-1995 |
| NOSH | Did Not Attend | ☐ | 06-JAN-1995 |
| | | ☐ | |
| | | ☐ | |

# Section B: Set Up

## Lesson: Comment Type Code Validation

Jump to TOC

**Purpose**

The Comment Type Code Validation Form (STVCMTT)

**Banner form**

Comment Type Code Validation STVCMTT 7.0

| Code | Description | Activity Date |
|---|---|---|
| 100 | General Comment | 02-APR-1987 |
| 101 | Added via ATP Tape | 29-APR-1987 |
| 103 | Added via ACT Tape | 29-APR-1987 |
| 104 | Special Needs | 29-APR-1987 |
| 105 | Intramurals | 12-FEB-1988 |
| 106 | Fraternity | 29-APR-1987 |
| 107 | Sorority | 29-APR-1987 |
| 108 | Debate Club | 29-APR-1987 |
| 109 | Athletic Scholarship | 29-APR-1987 |
| 110 | Added via Fin. Aid/CSS Tape | 10-AUG-1987 |
| 111 | Requested Campus Housing | 10-AUG-1987 |
| 112 | Assigned Campus Housing | 09-OCT-1987 |
| 114 | Internet Access | 02-AUG-2004 |

# Section B: Set Up

## Lesson: Outside Interest Code Validation

Jump to TOC

### Purpose

The Outside Interest Code Validation Form (STVINTS)

### Banner form

Outside Interest Code Validation STVINTS 7.0

| Code | Description | System Required | Activity Date |
|---|---|---|---|
| A1 | Instumental Music | ✓ | 09-MAY-2006 |
| A2 | Vocal Music | | 02-OCT-1987 |
| A3 | Student Government | | 02-OCT-1987 |
| A4 | Publications, Literary | | 02-OCT-1987 |
| A5 | Debate | | 02-OCT-1987 |
| A6 | Departmental Clubs | | 02-OCT-1987 |
| A7 | Dramatics, Theater | | 02-OCT-1987 |
| A8 | Religious Organizations | | 02-OCT-1987 |
| A9 | Racial or ethnic Organization | | 12-FEB-1991 |
| AA | Intramural Athletics | | 02-OCT-1987 |
| AB | Varsity Athletics | | 02-OCT-1987 |
| AC | Political Organizations | | 02-OCT-1987 |
| AD | Radio-TV | | 09-OCT-1987 |
| AE | Fraternity or Sorority | | 02-OCT-1987 |
| AF | Special Interest Groups | | 02-OCT-1987 |
| AG | Campus or Comm. Service Orgs. | | 02-OCT-1987 |
| AH | Art | | 02-OCT-1987 |
| AI | Coop or Intership Programs | | 02-OCT-1987 |
| AJ | Dance | | 02-OCT-1987 |
| AK | Envir or Ecology Activity | | 02-OCT-1987 |
| AL | Foreign Study - Study Abroad | | 02-OCT-1987 |
| AM | Honors or Ind. Study | | 02-OCT-1987 |

# Section B: Set Up

## Lesson: Setting Up Communication Plan Rules for Recruitment

Jump to TOC

**Purpose**

Communication Plan processing permits you to automatically assign a recruit, applicant, or student to a communication plan online, according to their campus, level, degree, and college, and the rules defined for your institution.

A communication plan defines standard materials and groups of materials to be sent to a prospect/applicant/student at pre-defined time intervals. For the recruiting process then, a communication plan would automatically generate materials allowing you to communicate quickly and efficiently with prospects.

**Communication Plan forms needed**

Your institution may choose to setup communication plan rules for the Recruitment module. Most of these forms can be accessed from the Communication Plan Rules and Control menu in the Recruitment module. Review these forms and practice entering information in each.

| Form Description | Banner Name |
|---|---|
| Letter Code Validation | GTVLETR |
| Email Address Type Validation | GTVEMAL |
| Letter Process | GUALETR |
| Paragraph Process | GUAPARA |
| Student Mail | SUAMAIL |
| Material | SOAMATL |
| Communication Plan Assignment | SOAPLAN |
| Communication Plan Collector | SOACCOL |
| Communication Group | SOACGRP |
| Communication Plan | SOACPLN |
| Communication Rules | SOACOMM |
| Duplicate Material Rules | SOADPMR |
| HTML Letter Rules | SOAELTL |
| Format HTML Letter Rules | SOAELTR |



**Directions**

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

**Question 1**

Most of the information on the Source/Background Institution Year Form (SOABGIY) is not validated to allow for user flexibility.

True / False

**Question 2**

Address information on the Source/Background Institution Base Form (SOASBGI) is displayed in what two student modules?

# Section B: Set Up

## Lesson: Answer Key for Self Check

Jump to TOC

**Question 1**

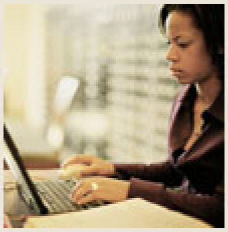
Most of the information on the Source/Background Institution Year Form (SOABGIY) is not validated to allow for user flexibility.

**True**

**Question 2**

Address information on the Source/Background Institution Base Form (SOASBGI) is displayed in what two student modules?

**Admissions**
**Academic History**



# Section C: Day-to-Day Operations

## Lesson: Overview

Jump to TOC

**Introduction**

The purpose of this section is to explain the regular process and detail the procedures to enter recruiting information.

**Intended audience**

Personnel from offices responsible for entering recruiting information

**Objectives**

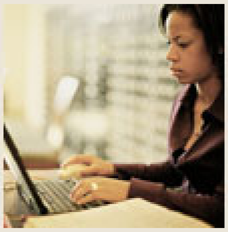
At the end of this section, you will be able to

- capture information on applicants
- enter new prospective students
- ensure that duplicate records are not created
- enter high school information
- enter prior college information
- enter tests and test scores
- enter recruiter appointments
- run reports related to the Recruitment module.

**Prerequisites**

To complete this section, you should have completed the Education Practices computer-based training (CBT) tutorial “Banner 7 Fundamentals,” or have equivalent experience navigating in the Banner system.

You will also need to ensure that the rules and validation codes in Banner needed for Recruitment have been set up for you.

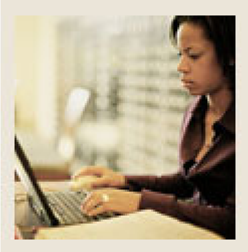


# Section C: Day-to-Day Operations

## Lesson: Overview (Continued)

Jump to TOC

**Section contents**



# Section C: Day-to-Day Operations

## Lesson: Process Introduction

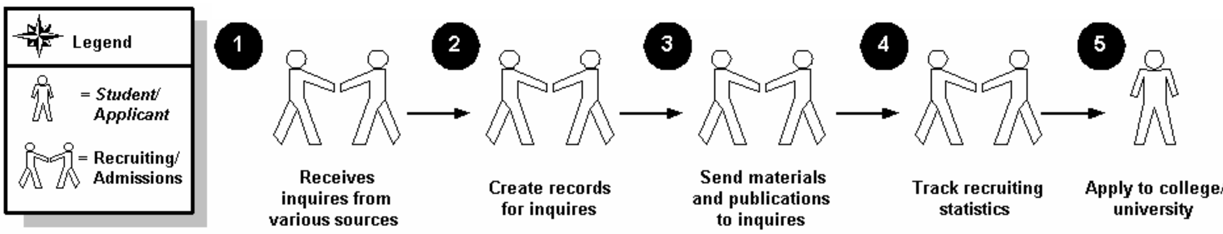
Jump to TOC

### About the process

- Potential students can also enter their own request for information over the Web.
- The Recruiting staff usually works in conjunction with the Admissions office.
- Information entered on the recruiting record can roll to the admissions record.
- When the prospects apply, this moves the process to the Admissions stage.

### Flow diagram

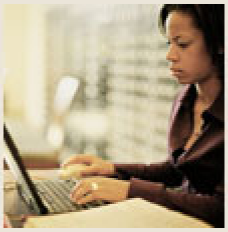
This diagram highlights the processes used to perform recruiting.




### What happens

The stages of the process are described in this table.

| Stage | Description |
|---|---|
| **Recruiting Personnel** | |
| 1 | Receive inquiries from various sources. |
| 2 | Create records for inquiries. |
| 3 | Send materials and publications to inquiries. |
| 4 | Track recruiting statistics. |
| **Applicant** | |
| 5 | Applies to college or university. |



# Section C: Day-to-Day Operations

## Lesson: Capturing Biographic/Demographic Information

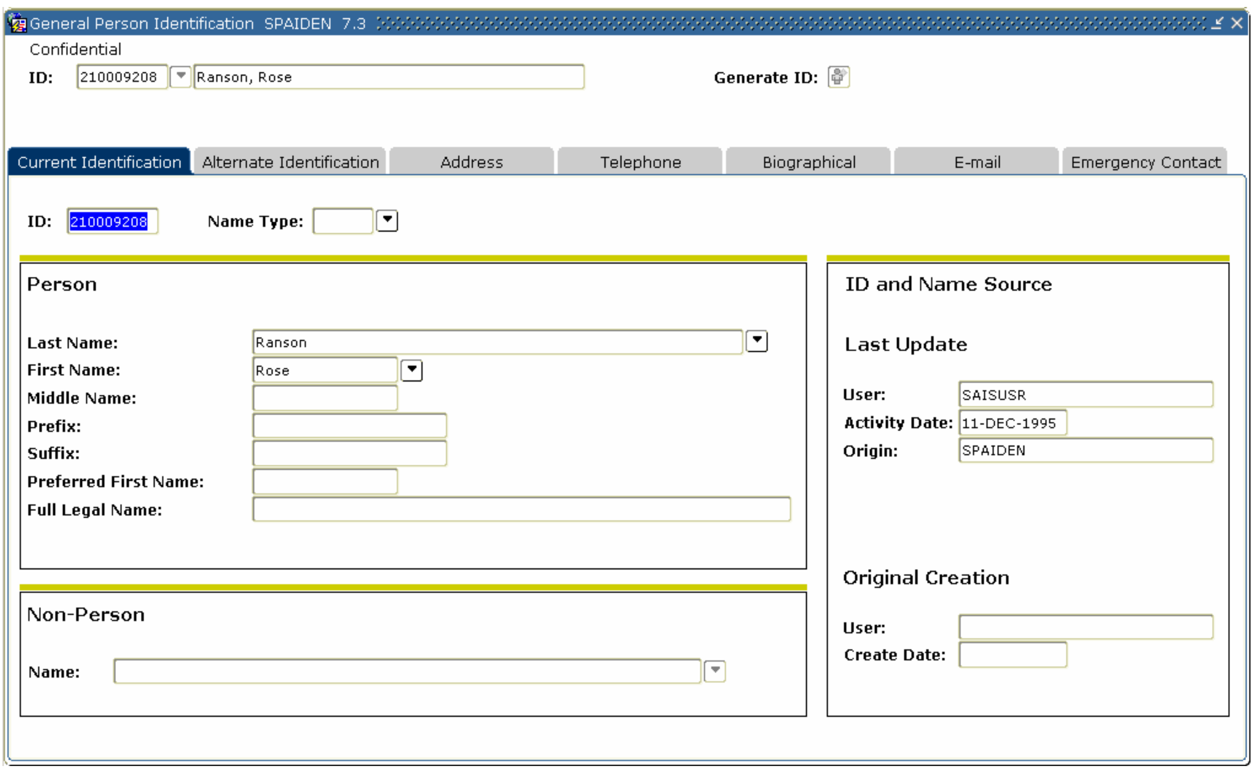
Jump to TOC

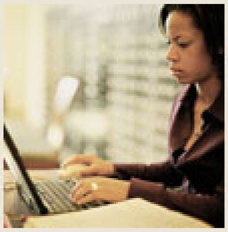
**Purpose**

The General Person Identification Form (SPAIDEN) is used to capture biographic/demographic information for all persons associated with the institution. Persons can belong to any or all of the installed Banner Systems (such as Student, Financial Aid, Finance). All persons created for Banner Student are first entered into the database using this form.

The information maintained in this form is specific to the person/non-person and does not relate to the person's involvement at the institution. All other modules/ systems are dependent on the information captured and maintained in this form. Any changes or additions to a person's biographic/demographic information must be made in this form.

**Banner form**





# Section C: Day-to-Day Operations

## Lesson: Capturing Biographic/Demographic Information (Continued)

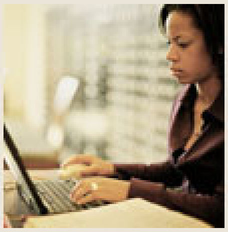
Jump to TOC

**Procedure**

Follow these steps to enter biographic/demographic information if your institution does *not* use the common matching feature.

Note: If your institution has enabled common matching, proceed to the next exercise.

| Step | Action |
|---|---|
| 1 | Access the General Person Identification Form (SPAIDEN).<br><br>Note: Perform a person search to be sure the name you have selected does not already exist in the Banner System. |
| 2 | Click the **Search** icon in the Key block. |
| 3 | Select Person Search or Alternate ID Search from the **Options** menu. |
| 4 | Navigate to the **Last Name** field in the Person Search window. |
| 5 | Type the last name of the person you are entering into the system followed by %. |
| 6 | Execute the Query. |
| 7 | Make sure the prospect name you are creating does not already exist.<br><br>If the prospect already exists, select a new name and repeat the person search.<br><br>If the prospect does not exist, exit the form and proceed to enter the prospect on SPAIDEN. |
| 8 | To generate a new ID number, type *GENERATED* in the **ID** field or click the **Generate ID** icon. Don't generate a new Banner ID until you've first performed the search to see if the person already exists in Banner. Perform steps 2-7 before you perform step 9. |
| 9 | Navigate to the **Last Name** field. |
| 10 | Enter the prospect's last name, first name, and middle name (if using) in the respective fields. |
| 11 | Click the down arrow next to the **Name Type** field. |
| 12 | Select a name type (optional).<br><br>Examples: *Maiden/Birth Name*, *Formal Name*, *Professional Name* |
| 13 | Click **OK**. |
| 14 | Click the **Save** icon. |
| 15 | Click the Address tab. |
| 16 | Click the down arrow next to the **Address Type** field. |
| 17 | Select *Permanent.* |

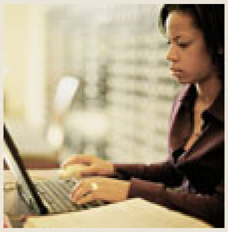




Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 18 | Click **OK**. |
| 19 | Enter an address.<br><br>Note: The down arrows next to the **State or Province**, **County**, and **Nation** fields can be used to view and select from the List of Values. |
| 20 | Enter a phone number in the **Telephone** field. |
| 21 | Click **OK**. |
| 22 | Leave the other fields blank. |
| 23 | Click the **Save** icon. |
| 24 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

## Lesson: Using Common Matching when Capturing Prospect Information

Jump to TOC

### Introduction

If your institution uses common matching, you will use common matching to avoid duplicates when entering prospects in the system.

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. Common matching replaces the existing algorithms from Financial Aid and Student with a centralized algorithm.

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). The Common Matching form (GOAMTCH) 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.

### Using common matching

You 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, you have the option to enhance existing data by inserting new information. Existing data will not be overwritten.

### Matching status

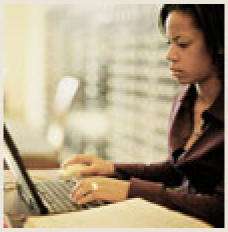
There are three possible results of running the Common Matching algorithm:

- 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 calling 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.



# Section C: Day-to-Day Operations

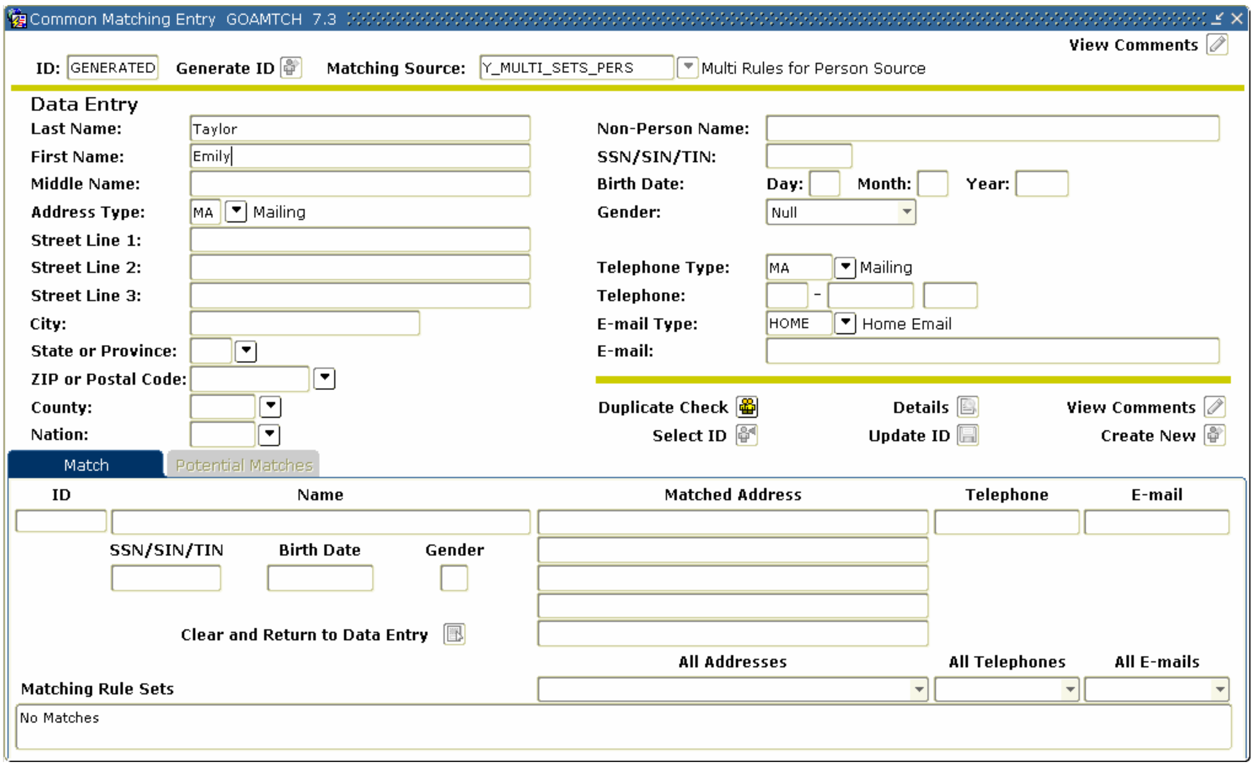
## Lesson: Using Common Matching when Capturing Prospect Information (Continued)

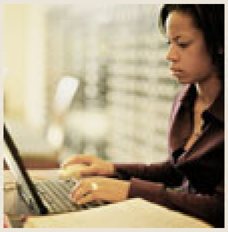
Jump to TOC

**Purpose**

The Common Matching Entry Form (GOAMTCH) allows you to determine whether an entity (person or non-person) matches an existing record before it is entered into the database.

**Banner form**





# Section C: Day-to-Day Operations

# Lesson: Using Common Matching when Capturing Prospect Information (Continued)

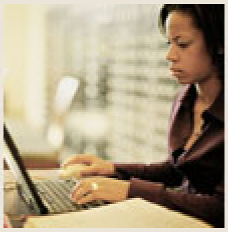
Jump to TOC

**Accessing the form**

The **Online Matching Process Enabled** checkbox on the Installation Controls Form (GUAINST) determines whether the Common Matching Entry Form (GOAMTCH) is called automatically when creating person or non-person records. If checked, GOAMTCH will be called when you try to create a record on %IDEN forms. If not checked, GOAMTCH will not be called automatically.

Additionally, if the **Exclude User** checkbox is checked on the Common Matching User Setup Form (GORCMUS), GOAMTCH will not be called automatically.

GOAMTCH will be called if an ID is entered that does not exist or if the **Generate ID** feature is used. If not called automatically, GOAMTCH can be accessed from the **Options** menu from the key block of %IDEN forms.



# Section C: Day-to-Day Operations

## Lesson: Using Common Matching when Capturing Prospect Information (Continued)

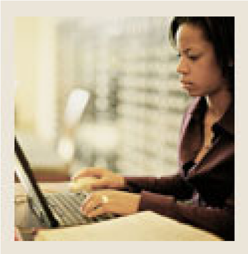
Jump to TOC

**Procedure**

Follow these steps to use common matching when entering prospect data.

Note: You can access the Common Matching Entry Form (GOAMTCH) directly; however, in most cases you will access it from another form during the data entry process.

| Step | Action |
|---|---|
| 1 | Access the General Person Identification Form (SPAIDEN). |
| 2 | Enter the ID of the person to be created or click the **Generated** icon to generate an ID.<br><br>Note: You can choose to select GOAMTCH from the **Options** menu at this point. |
| 3 | Perform a **Next Block** function.<br><br>Result: You are automatically taken to GOAMTCH if this has been enabled on GUAINST. The ID or *Generated* will appear in the **ID** field. |
| 4 | If necessary, choose a source code for the **Matching Source** field.<br><br>Note: This may default in, depending on the setup on GORCMUS. |
| 5 | Perform a **Next Block** function. |
| 6 | Enter available person data to be used in matching. The information entered in the Data Entry block can be used for updating an existing record or creating a new record. |
| 7 | Click the **Duplicate Check** icon or perform a **Next Block** function to execute the Common Matching algorithm.<br><br>Result: If an exact match is found, the person and their data will display in the **Match** tab. The **Potential Match** tab will be available only if other potential matches are found. |

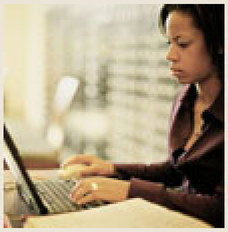




Jump to TOC

**Procedure, continued**

| Step | Action | |
|---|---|---|
| 8 | **IF the result is…** | **THEN follow these steps.** |
| | New | Click the **Create New** icon to create a new PIDM.<br><br><u>Result</u>: A new Banner PIDM is created; data from the top block is inserted into the appropriate tables. |
| | Match | To match the person in the top half of the form to the person found by the match, choose either:<br><br>• **Select ID** to select the record and carry it back to the key block of SPAIDEN.<br>• **Update ID** to update the record with data from top block. |
| | Potential Match | Click the **Potential Match** tab. Review the data for each potential match.<br><br>Click the **Details** button to view data about the potential match on other forms (defined on GORCMSC).<br><br>Determine if person is new or a match and select the appropriate icon (**Create New** or **Select ID** or **Update ID**). |



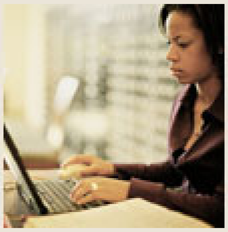
# Section C: Day-to-Day Operations

## Lesson: Using Common Matching when Capturing Prospect Information (Continued)

Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 9 | If the person is new, click **OK** to any prompts.<br><br>Result: After completing the update or insert, you will be returned to the key block of SPAIDEN to continue your data entry.<br><br>Warning: If you have not selected any matching options, you will be unable to perform a **Next Block** function to enter any data after returning to the SPAIDEN Form. |
| 10 | Perform a **Next Block** function.<br><br>Note: You can click any of the available tabs on SPAIDEN (Address, Telephone, etc.) to enter any additional information on the person. |
| 11 | Follow the remaining steps to enter address information. |
| 12 | Click the Address tab. |
| 13 | Click the down arrow next to the **Address Type** field to view the Option List. |
| 14 | Select *Permanent.* |
| 15 | Click **OK**. |
| 16 | Enter an address.<br><br>Note: The down arrows next to the **State or Province**, **County**, and **Nation** fields can be used to view and select from the List of Values. |
| 17 | Click the **Save** icon. |
| 18 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

## Lesson: Capturing Information on Prospective Applicants

Jump to TOC

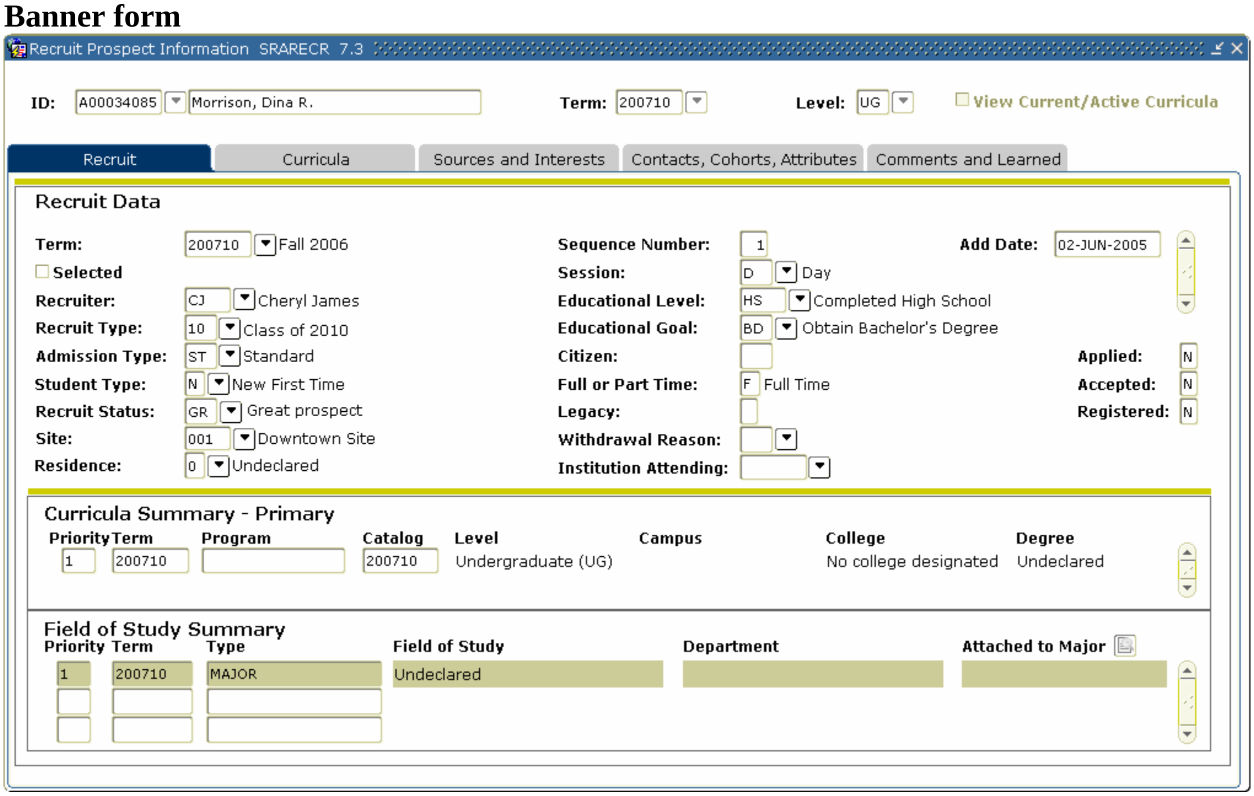
### Purpose

The Recruit Prospect Information Form (SRARECR) provides the information necessary for all recruitment-related activities. This form captures and validates information on prospective applicants. This information includes sources (high schools, colleges, groups, alumni, and individuals), intended degrees and majors, outside interests, and contacts, cohorts, and attributes. This form is the basis for all related recruiting forms.

Note: Each member of the class must create a unique prospect.

On the first window of the Recruit Prospect Information Form (SRARECR), a "Curricula Summary" window exists which shows the most current curricula for the person (current = most recent rows that are active for each priority). This window also indicates if the SORLCUR row displayed has been backfilled as part of the Primary or Secondary curriculum.

### Banner form


Recruit Prospect Information SRARECR 7.3

ID: A00034085 Morrison, Dina R. Term: 200710 Level: UG View Current/Active Curricula

Recruit | Curricula | Sources and Interests | Contacts, Cohorts, Attributes | Comments and Learned

Recruit Data

Term: 200710 Fall 2006
Selected
Recruiter: CJ Cheryl James
Recruit Type: 10 Class of 2010
Admission Type: ST Standard
Student Type: N New First Time
Recruit Status: GR Great prospect
Site: 001 Downtown Site
Residence: 0 Undeclared

Sequence Number: 1
Session: D Day
Educational Level: HS Completed High School
Educational Goal: BD Obtain Bachelor's Degree
Citizen:
Full or Part Time: F Full Time
Legacy:
Withdrawal Reason:
Institution Attending:

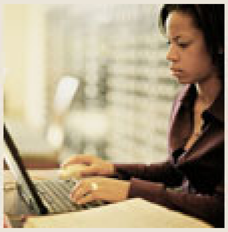
Add Date: 02-JUN-2005
Applied: N
Accepted: N
Registered: N

Curricula Summary - Primary

| Priority | Term | Program | Catalog | Level | Campus | College | Degree |
|---|---|---|---|---|---|---|---|
| 1 | 200710 | | 200710 | Undergraduate (UG) | | No college designated | Undeclared |

Field of Study Summary

| Priority | Term | Type | Field of Study | Department | Attached to Major |
|---|---|---|---|---|---|
| 1 | 200710 | MAJOR | Undeclared | | |



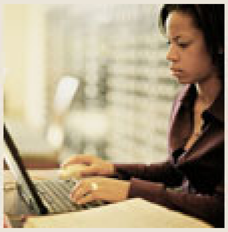


Jump to TOC

**Procedure**

Follow these steps to capture recruiting information.

| Step | Action |
|---|---|
| 1 | Access the Recruit Prospect Information Form (SRARECR). |
| 2 | Has the **ID** field auto-populated with your new person?<br><br>If not, enter the ID of the person you created in a previous exercise. |
| 3 | Tab to the **Name** field (adjacent to the **ID** field).<br><br><u>Note</u>: Default values will appear in the appropriate fields as you move through the form. |
| 4 | Click the down arrow next to the **Term** field. |
| 5 | Select the current fall term code. |
| 6 | Click **OK**. |
| 7 | Click the down arrow next to the **Level** field.<br><br><u>Note</u>: The **Level** field is optional, and if it is left blank, existing recruiting records of all levels will be displayed on this form. If a value is entered in this field, only those existing recruiting records with the same level will be displayed. |
| 8 | Select the code for undergraduate. |
| 9 | Click **OK**. |
| 10 | Click the **View Current/Active Curricula** checkbox if you want only current and active curriculum records to be displayed in the Curriculum and Field of Study blocks. |
| 11 | Perform a **Next Block** function.<br><br><u>Result</u>: The **Term** field will auto-populate if the equivalent field was entered in the key block. |
| 12 | Leave the **Selected** checkbox unchecked. |
| 13 | Using the down arrows next to each field, complete the fields in the Recruit Data block. |
| 14 | Perform a **Next Block** function or click the <u>Curricula</u> tab of the form.<br><br><u>Result</u>: You will be taken to the Curricula tab if no curricula data yet exists for the record being created. If curricula exists, you will be taken to the Curricula Summary window on the Recruit tab. |
| 15 | Enter curricula data, including priority, program and/or other data in the fields related to the curriculum. |
| 16 | Perform a **Next Block** function to access the Field of Study block. |





Jump to TOC

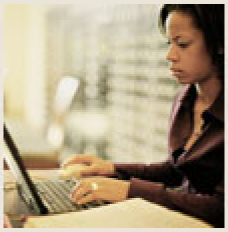
**Procedure continued**

| Step | Action |
|---|---|
| 17 | Complete these fields, if not already completed: **Priority**, **Type** (*Major*, *Minor* or *Concentration*), **Status** (if other than the default), and **Field of Study**.<br><br>Warning: At least one row with Type = Major must exist. Without a major, you will not be able to save the record.<br><br>Note: Using the down arrow or Ctrl+H on the **Field of Study** field will bring up an options window with appropriate selections based on how the curriculum is defined on SOACURR. |
| 18 | Click the **Save** icon.<br><br>Note: The Communication Plan Change window will appear only if the prospect has qualified for a plan based on the rules established on the Communication Rules Form (SOACOMM). Should the window appear, save the communication plan then click on the Return button located in the lower right-hand corner to return to the main window. |
| 19 | Click **OK**. |
| 20 | Click the **Save** icon. |
| 21 | Click the Sources, Interests, Withdrawal tab. |
| 22 | Click the down arrow next to the **Source** icon to access the query form. The source for this prospect is the college you created in a previous exercise. |
| 23 | In the **Type** field, enter *C*. |
| 24 | In the **Source/Background Institution** field, enter the name of the college [*Your Initials*] *College* followed by %.<br><br>Example: *ABC College%* |
| 25 | Execute the Query. |
| 26 | Double-click the **Type** field of the correct college.<br><br>Result: This returns the value to the Source, Interests, Withdrawal window. |
| 27 | Select the **Primary Source** checkbox. |
| 28 | Perform a **Next Block** function. |

Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 28 | Click the down arrow below the **Interests** field to view the List of Values. |
| 29 | Select an interest. |
| 30 | Click **OK**. |
| 31 | Click the down arrow below the **Interests** field again to view the List of Values. |
| 32 | Select a second interest. |
| 33 | Click **OK**. |
| 34 | Click the **Save** icon. |
| 35 | Click the **Contacts, Cohorts, Attributes** tab. |
| 36 | Click the down arrow below the **Contact** field to view the List of Values. |
| 37 | Select *Campus Visit.* |
| 38 | Click **OK**. |
| 39 | Click the **Save** icon. |
| 40 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

## Lesson: Entering Prospects Using the Quick Recruit Form

Jump to TOC

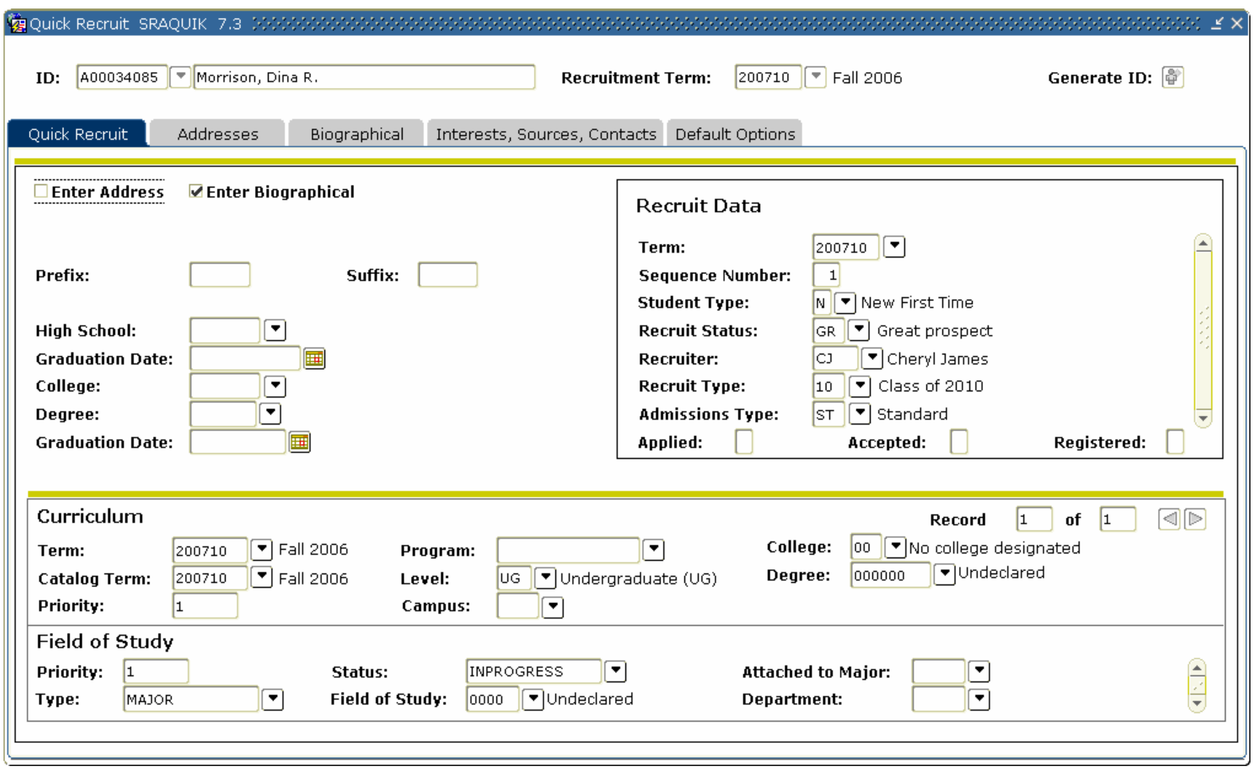
### Purpose

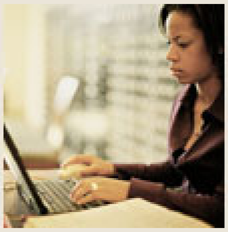
The Quick Recruit Form (SRAQUIK) is designed to allow faster entry of new prospective students. It is generally used when you have a group of prospects that have common characteristics. Use the default rules to define those common characteristics and change the defaults when the characteristics change. If you have a large group of prospects to enter, this form works best if you sort the forms into a logical order before beginning your entry.

This form allows you to enter home address, high school, prior college, and all necessary recruiting information.

The Quick Recruit Form (SRAQUIK) can be used with the Common Matching Form (GOAMTCH), if your institution has enabled common matching. See the topic *Using Common Matching when Capturing Prospect Information* for a complete list of steps for using GOAMTCH.

### Banner form





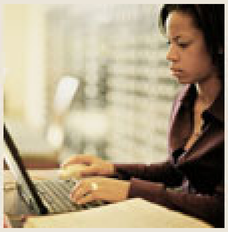


Jump to TOC

**Procedure**

Create a recruiting record for prospect 2 and generate an ID within the Quick Recruit Form. Use a unique fictitious name for prospect 2. You also will add address information for the prospect. Follow these steps to complete the process.

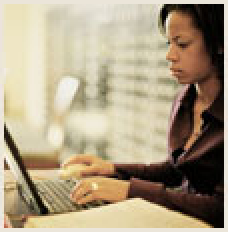
| Step | Action |
|---|---|
| 1 | Access the Quick Recruit Form (SRAQUIK). |
| 2 | Select <u>Default Options</u> from the **Options** menu to access the Default Options window. |
| 3 | Click the down arrow next to the **Recruit Term** field to view the List of Values. |
| 4 | Select the current fall term. |
| 5 | Click **OK**. |
| 6 | Click the down arrow next to the **Address Type** field to view the List of Values. |
| 7 | Select *Permanent.* |
| 8 | Click **OK**. |
| 9 | Click the down arrow next to the **Contact Type** field to view the List of Values. |
| 10 | Select *Campus visit.* |
| 11 | Click **OK**. |
| 12 | Enter the source code *[Your Initials]3* from a previous exercise in the **Source** field. |
| 13 | Enter the recruiter code *[Your Initials]* from a previous exercise in the **Recruiter** field. |
| 14 | Enter the high school code *[Your Initials]2* from a previous exercise in the **High School** field. |
| 15 | Click the down arrow next to the **Recruit Type** field to view the List of Values. |
| 16 | Select *New.* |
| 17 | Click **OK**. |
| 18 | Leave the **Prior College** field empty. |
| 19 | Leave the **Transfer Degree** field empty. |
| 20 | Click the down arrow next to the **Recruit Status** field to view the List of Values. |
| 21 | Select *Undetermined.* |
| 22 | Click **OK**. |
| 23 | Click the down arrow next to the **Student Type** field to view the List of Values. |
| 24 | Select *New first time.* |





**Procedure, continued**

| Step | Action |
|---|---|
| 25 | Click **OK**. |
| 26 | Perform a **Rollback** function.<br><br>Result: This will take you back to the key block of the form. |
| 27 | Click the **Generate ID** button.<br><br>Result: This may take you to the Common Matching Entry Form (GOAMTCH), depending on the setup at your institution. |
| 28 | Click in the **Term** field in the Recruit Data section.<br><br>Result: This will auto-populate the additional fields. |
| 29 | Click the **Save** icon. |
| 30 | Perform a **Rollback** function. |
| 31 | Enter the ID of your second prospect.<br><br>Result: You will be taken to the Common Matching Entry Form (GOAMTCH) if this has been enabled. This will ensure that the person does not already exist in the system. |
| 32 | Perform a **Next Block** function. |
| 33 | Are you taken to the next block? If not, choose a source code for the **Matching Source** field.<br><br>Note: The Matching Source may default in, depending on the setup on GORCMUS. |
| 34 | Perform a **Next Block** function. |
| 35 | Enter person data in the **Last Name** and **First Name** fields. |
| 36 | Click the **Duplicate Check** icon or perform a **Next Block** function to execute the Common Matching algorithm.<br><br>Result: You should create a new person here. If an exact match is found, the person and their data will display in the **Match** tab. The **Potential Match** tab will only be available if other potential matches are found. |

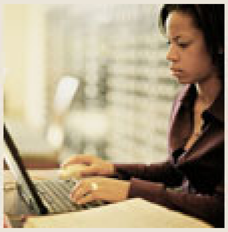




Jump to TOC

**Procedure, continued**

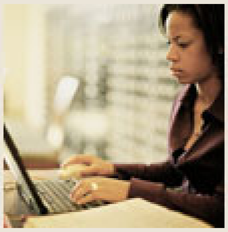
| Step | Action |
|---|---|
| 37 | Click **OK** to any prompts to return to SRAQUIK and create the new record.<br><br><u>Note</u>: Refer to the topic *Using Common Matching When Capturing Prospect Information* for a complete list of steps for using common matching.<br><br><u>Note</u>: You will automatically return to the Quick Recruit Form. Notice that the **ID** and **Name** fields are now populated. |
| 38 | Enter the term in the **Recruitment Term** field. |
| 39 | Perform a **Next Block** function. |
| 40 | Click the **Enter Address** checkbox.<br><br><u>Result</u>: You are taken to the Addresses tab. |
| 41 | Enter dates in the **From Date** and **To Date** field. |
| 42 | Click the down arrow next to the **Address Type**. |
| 43 | Enter an address in the **Street Line**, **City**, **State or Province**, **Zip or Postal Code**, and **Nation** (if outside your nation) fields.<br><br><u>Note</u>: The down arrows next to the **State or Province**, **County**, and **Nation** fields can be used to view the List of Values to select the appropriate value. |
| 44 | Enter a telephone number in the **Telephone** field. |
| 45 | Leave the **Source**, **User**, **Delivery Point**, and **Activity** fields blank. |
| 46 | Click the **Save** icon. |
| 47 | Click the Quick Recruit tab. |
| 49 | Select a gender. |
| 50 | Enter a date of birth in the **Birth Date** field.<br><br><u>Example</u>: *15-OCT-1986* |
| 51 | Click the down arrow next to the **Ethnic** field. |
| 52 | Select an ethnicity. |
| 53 | Click **OK**. |
| 54 | Click the down arrow next to the **Legacy** field. |
| 55 | Select a legacy.<br><br><u>Example</u>: *aunt, uncle, brother* |
| 56 | Click **OK**. |





**Procedure, continued**

| Step | Action |
|---|---|
| 57 | Click in the **Graduation Date** field. |
| 58 | Enter a graduation date.<br><br><u>Example</u>: *06-JUN-2008* |
| 59 | Perform a **Next Block** function. |
| 60 | Click in the **Term** field in the Recruit Data section.<br><br><u>Result</u>: Fields on the remaining areas of the form will auto-populate. |
| 61 | Perform a **Next Block** function to access the Curriculum window. |
| 62 | Enter a program in the **Program** field.<br><br><u>Result</u>: Depending on the program entered, other fields may auto-populate. |
| 63 | Complete other fields if necessary.<br><br><u>Examples</u>: **Campus**, **Level**, etc. |
| 64 | Click the **Save** icon.<br><br><u>Note</u>: The Communication Plan Change window will appear only if the prospect has qualified for a plan based on the rules established on the Communication Rules Form (SOACOMM). |
| 65 | If the Communication Plan Change window appears, click the **Save** icon then click on the **Return** button located in the lower right-hand corner to return to the main window. |
| 66 | Click the Interests, Sources, Contacts tab. |
| 67 | Enter an interest in the **Interest** field. |
| 68 | Click the **Save** icon. |
| 69 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

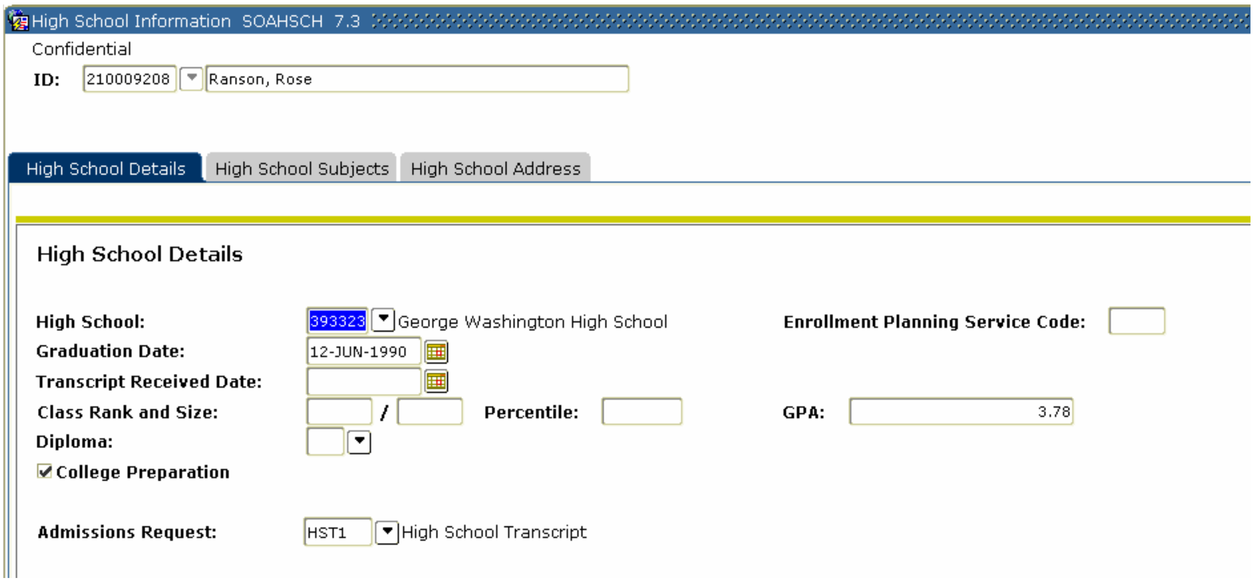
## Lesson: Entering High School Information for Prospects

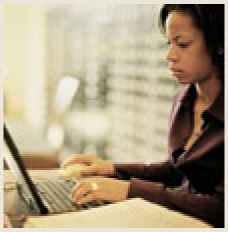
Jump to TOC

### Purpose

The High School Information Form (SOAHSCH) is used to enter information about a person's high school career.  The information includes high school, transcript dates, graduation date, GPA, and subjects taken in high school.

### Banner form





# Section C: Day-to-Day Operations

## Lesson: Entering High School Information for Prospects (Continued)

Jump to TOC

**Procedure**

Follow these steps to complete the process of identifying high school information for the two recruiting records created in previous exercises.

<u>Warning</u>: Do not interchange the prospect records in this exercise.

| Step | Action |
|---|---|
| 1 | Access the High School Information Form (SOAHSCH). |
| 2 | Enter the ID for the recruiting record that was created in a previous exercise in the **ID** field.<br><br>If you do not remember the ID, perform a name search to locate the ID by tabbing to the **Name** field (adjacent to the **ID** field).<br><br>Enter the last name of the prospect created previously followed by a percent sign.<br><br><u>Example</u>: *Smith%*<br><br>Press the [Enter] key. If one match is found, the ID and name are returned to the key block. If more than one match is found, the ID and Name Extended Search window appears. Pull down the list of matches in the **Search Results** field in the ID and Name Extended Search window. Scroll to the desired name and ID. Click on the desired name and ID. The information will be returned to the key block. |
| 3 | Perform a **Next Block** function to access the main body of the form. |
| 4 | Enter the high school code [*Your Initials*]2 from a previous exercise in the **High School** field, |
| 5 | Click the **High School Address** tab. |
| 6 | Verify the address information. |
| 7 | Click back to the **High School Details** tab. |
| 8 | Leave the **Enrollment Planning Service Code** field empty. |
| 9 | In the **Graduation Date** field, enter *May 15, 200X* in DD-MMM-YYYY format.<br><br><u>Example</u>: 15-MAY-2008. |

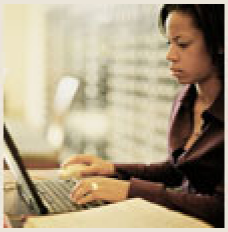
Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 10 | Enter the *current date* in DD-MMM-YYYY format in the **Transcript Received Date** field.<br><br>Note: Enter the transcript date only if you have an official or final transcript for the person. Entry of this field automatically clears the checklist items (required documents list) at the Admissions stage if the student applies. |
| 11 | Select the **College Preparation** checkbox. |
| 12 | Enter a rank and size in the **Class Rank and Size** field.<br><br>Note: The **Percentile** field will automatically calculate, based on rank and size. |
| 13 | Enter a *GPA* in the **GPA** field.<br><br>Note: HST1 will default in the **Admissions Request** field. |
| 14 | Click the down arrow next to the **Diploma** field to view the List of Values. |
| 15 | Select *College Preparatory*. |
| 16 | Click **OK**. |
| 17 | Click the **Save** icon. |
| 18 | Select High School Subjects from the **Options** menu or click the **High School Subjects** tab to access the High School Subjects window. |
| 19 | Click the down arrow below the **Subjects** field to view the List of Values. |
| 20 | Select *Mathematics*. |
| 21 | Click **OK**. |
| 22 | Indicate that the prospect has completed two years of Mathematics with grades of AABA and a GPA of 3.75.<br><br>Note: You will want to reconsider whether/how you enter information into this block after you have admissions training. The information in this block can be used in automated decision calculation. |
| 23 | Click the **Save** icon. |

**Procedure, continued**

| Step | Action |
|---|---|
| 24 | Perform a **Rollback** function to return to the High School Details window. |
| 25 | Enter the ID for the prospect and recruiting record that was created in a previous exercise in the **ID** field.<br><br>If you do not remember the ID, perform a name search to locate the ID by tabbing to the **Name** field (adjacent to the **ID** field).<br><br>• Enter the last name of the person created in a previous exercise followed by a percent sign.<br>Example: *Smith*%<br><br>• Press the [Enter] key. If one match is found, the ID and name are returned to the key block. If more than one match is found, the ID and Name Extended Search window appears. Pull down the list of matches in the **Search Results** field in the ID and Name Extended Search window. Scroll to the desired name and ID. Double-click on the desired name and ID. The information will be returned to the key block. |
| 26 | Perform a **Next Block** function. |
| 27 | The **High School** information will default from the Quick Recruit Form. |
| 31 | Leave the **Enrollment Planning Service Code** field empty.<br><br>Note: The **Graduation Date** field will default. |
| 32 | Enter the *current date* in DD-MON-YYYY format in the **Transcript Received Date** field.<br><br>Example: 01MAR2003<br><br>Note: Enter the transcript date only if you have an official or final transcript for the person. Entry of this field will automatically satisfy the checklist items (required documents list) at the Admissions stage if the student applies. |
| 33 | Select the **College Preparation** check box. |
| 34 | Enter a rank and size in the **Class Rank and Size** field.<br><br>Note: The **Percentile** field will automatically calculate, based on rank and size. |

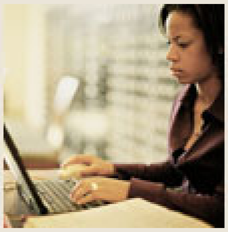




Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 35 | Enter a *GPA* in the **GPA** field.<br><br>Note: The high school code HST1 will default in the **Admissions Request** field. |
| 36 | Click the down arrow next to the **Diploma** field to view the List of Values. |
| 37 | Select *College Preparatory*. |
| 38 | Click **OK**. |
| 39 | Click the **Save** icon. |
| 40 | Select High School Subjects from the **Options** menu to access the High School Subjects window. |
| 41 | Click the down arrow next to the **Subjects** field to view the List of Values. |
| 42 | Select *French*. |
| 43 | Click **OK**. |
| 44 | Indicate that the prospect has completed two years of French with grades of BBCA and a GPA of 3.00. |
| 45 | Click the **Save** icon. |
| 46 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

## Lesson: Entering Prior College Information

Jump to TOC

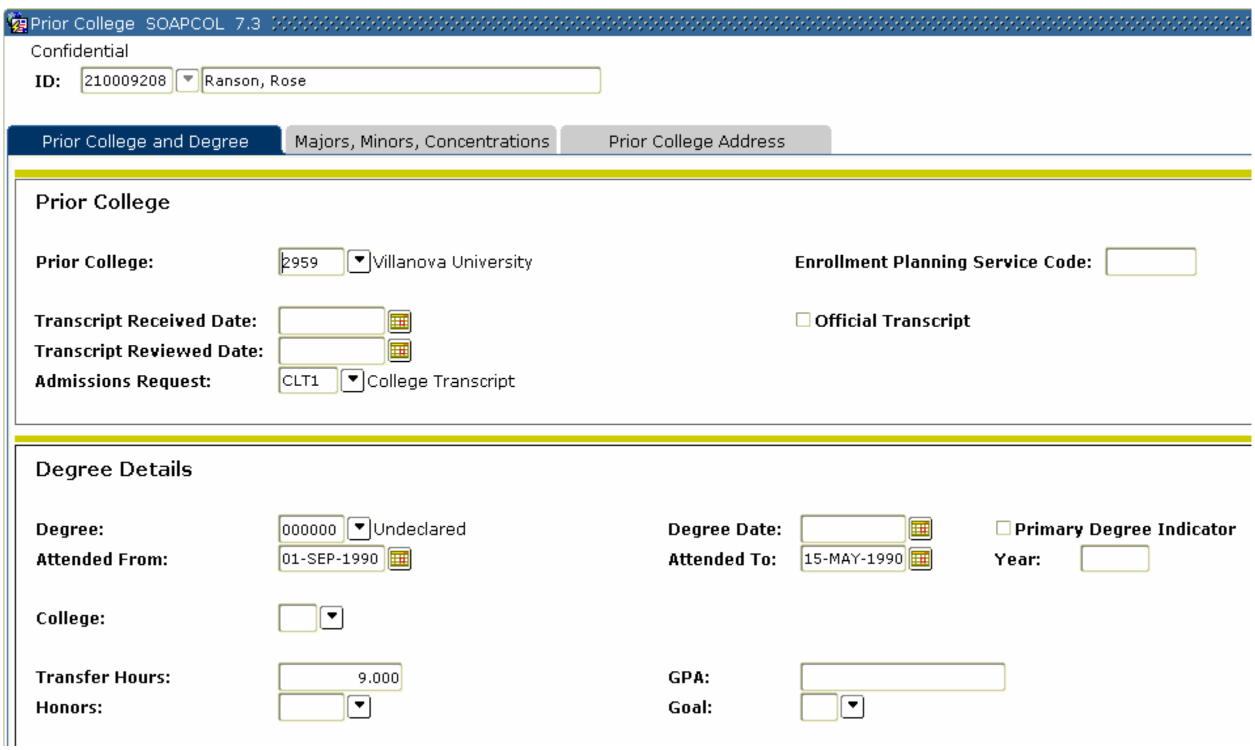
**Purpose**

The Prior College Form (SOAPCOL) is used to enter information about a person's prior college experience. The degree information including GPA, hours, honors, and attendance dates is also maintained on this form, along with majors, minors, and concentrations associated with the degrees. Multiple degrees may be created for a prior college.

Note: If you attempt to delete a degree record that has attached majors, minors, or concentrations, you will receive the following message: *"Cannot delete Prior College Degree; Major/Minor/Area of Concentration data exists."*

A person must be added to the system via the General Person Identification Form (SPAIDEN) prior to entering this form.

**Banner form**



Prior College SOAPCOL 7.3

Confidential

ID: 210009208 Ranson, Rose

Prior College and Degree | Majors, Minors, Concentrations | Prior College Address

Prior College

Prior College: 2959 Villanova University

Enrollment Planning Service Code:

Transcript Received Date:

Official Transcript

Transcript Reviewed Date:

Admissions Request: CLT1 College Transcript

Degree Details

Degree: 000000 Undeclared

Degree Date:

Primary Degree Indicator

Attended From: 01-SEP-1990

Attended To: 15-MAY-1990

Year:

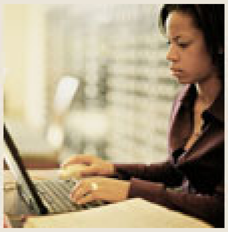
College:

Transfer Hours: 9.000

GPA:

Honors:

Goal:



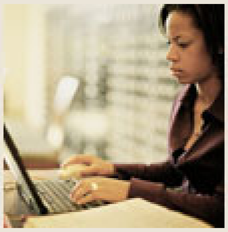


**Procedure**

The recruiting record created for prospect 1 is a transfer student. A transcript from the other college has been received. Record the receipt of the transcript.

Follow these steps to complete the process.

| Step | Action |
|---|---|
| 1 | Access the Prior College Form (SOAPCOL). |
| 2 | Enter the ID for the recruiting record (prospect 1) that was created in a previous exercise in the **ID** field. If you do not remember the ID, perform a name search to locate the ID:<br><br>• Leave the **ID** field empty. Tab to the **Name** field (adjacent to the **ID** field).<br><br>• Enter the last name prospect 1 created in Exercise 4.2.2 followed by a percent sign. Example: *Smith%*<br><br>• Press the [Enter] key. If one match is found, the ID and name are returned to the key block. If more than one match is found, the ID and Name Extended Search window appears. Pull down the list of matches in the **Search Results** field in the ID and Name Extended Search window. Scroll to the desired name and ID. Double-click on the desired name and ID. The information will be returned to the key block. |
| 3 | Perform a **Next Block** function. |
| 4 | Enter the college code [*Your Initials*]1 created in a previous exercise in the **Prior College** field.<br><br>Note: The **Admissions Request** field auto-populates when [Enter] is pressed or you select another field. |
| 5 | Enter the current date in DD-MMM-YYYY format in the **Transcript Received Date** field.<br><br>Example: 01-JUL-2003<br><br>Note: Enter the transcript date only if you have an official or final transcript for the person. Entry of this field will automatically satisfy the checklist items (required documents list) at the Admissions stage if the student applies. |
| 6 | Leave the **Transcript Reviewed Date** field empty. |
| 7 | Select the **Official Transcript** checkbox. |

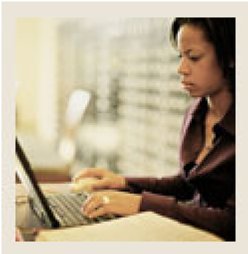




Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 8 | Click the **Save** icon. |
| 9 | Click the down arrow next to the **Degree** field to view the List of Values. |
| 10 | Select *Undeclared.* |
| 11 | Click **OK**. |
| 12 | Enter these dates in the **Attended From** and **Attended To** fields.<br><br>Example: 01-SEP-2002 15-MAY-2003<br><br>Note: The prospect attended the other institution from September 1, 2002 to May 15, 2003. |
| 13 | Click the **Save** icon. |
| 14 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

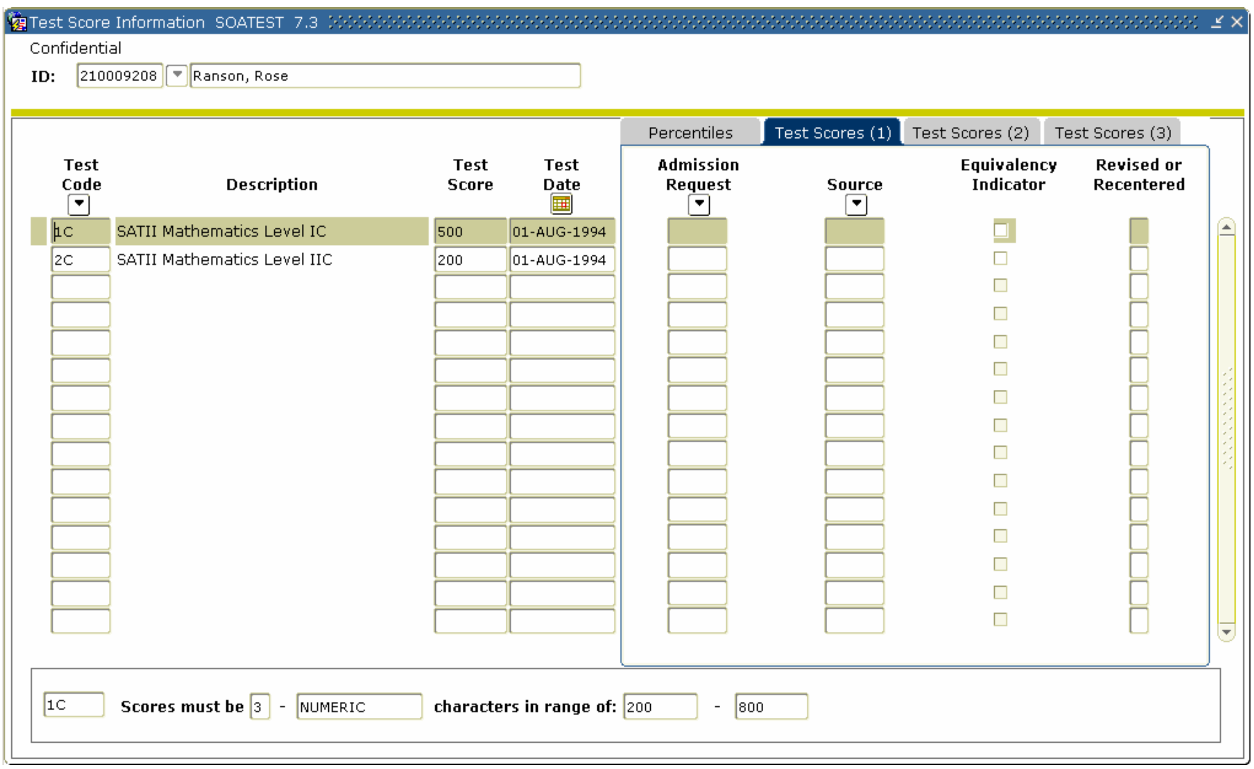
## Lesson: Entering Tests and Test Scores

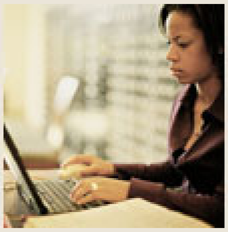
Jump to TOC

### Purpose

The Test Score Information Form (SOATEST) is used to record and maintain test score information. Test scores for SAT, ACT, GRE, GMAT, and AMCAS tests may be loaded onto the system from test score tapes and are recorded on this form. Test scores may also be added manually on SOATEST.

### Banner form



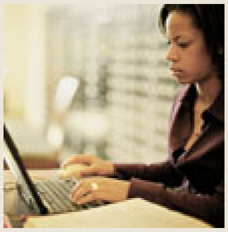




**Procedure**

Enter SAT test scores from a high school transcript and a college transcript for prospect 1 and prospect 2. Follow these steps to complete the process.

| Step | Action |
|---|---|
| 1 | Access the Test Score Information Form (SOATEST). |
| 2 | Enter the ID for the recruiting record (prospect 1) that was created in a previous exercise in the **ID** field. If you do not remember the ID, perform a name search to locate the ID. |
| 3 | Perform a **Next Block** function. |
| 4 | Click the down arrow below the **Test Code** field to view the List of Values. |
| 5 | Select *SAT Verbal.* |
| 6 | Click **OK**. |
| 7 | Enter a score in the **Test Score** field within the range indicated in the **characters in range of:** fields at the bottom of the form. |
| 8 | In the **Test Date** field, enter *May 1, 200X*.<br><br>Example: 01-MAY-2003 |
| 9 | Select the Test Scores (2) tab. |
| 10 | Click the down arrow above the **Administration Type** field to view the List of Values. |
| 11 | Select *National.* |
| 12 | Click **OK**.<br><br>Result: The **Admission Request** field defaults to TSTS.<br><br>Note: Use the vertical scroll bar or Tab key to view additional fields. |
| 13 | Select the Test Scores (1) tab. |
| 14 | Click the down arrow below the **Source** field to view the List of Values. |
| 15 | Select *College transcript.* |
| | Click **OK**. |
| 16 | Click the **Save** icon. |
| 17 | Use the down arrow on your keyboard to move to the next record/line. |
| 18 | Click the down arrow below the **Test Code** field to view the List of Values. |
| 19 | Select *SAT Mathematics.* |
| 20 | Click **OK**. |
| 21 | Enter a score in the **Test Score** field within the range indicated. |
| 22 | Enter *May 1, 2003* in the **Test Date** field. |

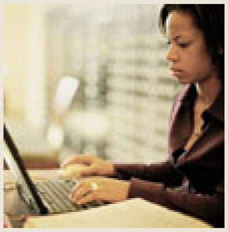




Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 23 | Select the <u>Test Scores (2)</u> tab. |
| 24 | Click the down arrow above the **Administration Type** field to view the List of Values. |
| 25 | Select National. |
| 26 | Click **OK**.<br><br><u>Result</u>: The **Request** field defaults to *TSTS*. |
| 27 | Select the <u>Test Scores (1)</u> tab. |
| 28 | Click the down arrow below the **Source** field to view the List of Values. |
| 29 | Select *College transcript.* |
| 30 | Click **OK**. |
| 31 | Click the **Save** icon. |
| 32 | Perform a **Rollback** function. |
| 33 | Enter the ID for the recruiting record (prospect 2) that was created in a previous exercise in the **ID** field. If you do not remember the ID, perform a name search to locate the ID. |
| 34 | Perform a **Next Block** function. |
| 35 | Click the down arrow below the **Test Code** field to view the List of Values. |
| 36 | Select *SAT Verbal.* |
| 37 | Click **OK**. |
| 38 | Enter a score within the range indicated in the **Test Score** field. |
| 39 | Enter *August 12, 2002* in the **Test Date** field.<br><br><u>Example</u>: 12-AUG-2002 |
| 40 | Select the <u>Test Scores (2)</u> tab. |
| 41 | Click the down arrow below the **Administration Type** field to view the List of Values. |
| 42 | Select *National.* |
| 43 | Click **OK**.<br><br><u>Result</u>: The **Request** field defaults to *TSTS*. |
| 44 | Select the <u>Test Scores (1)</u> tab. |
| 45 | Click the down arrow next to the **Source** field to view the List of Values. |
| 46 | Select *H.S. transcript.* |
| 47 | Click **OK**. |
| 48 | Click the **Save** icon. |

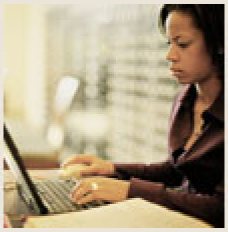




Jump to TOC

**Procedure, continued**

| Step | Action |
|---|---|
| 49 | Use the down arrow on your keyboard to move to the next record/line. |
| 50 | Click the down arrow below the **Test Code** field to view the List of Values. |
| 51 | Select *SAT Mathematics.* |
| 52 | Click **OK**. |
| 53 | Enter a score within the range indicated in the **Test Score** field. |
| 54 | Enter *August 12, 2002* in the **Test Date** field.<br><br>Example: 12-AUG-2002 |
| 55 | Select the Test Scores (2) tab. |
| 56 | Click the down arrow below the **Administration Type** field to view the List of Values. |
| 57 | Select *National.* |
| 58 | Click **OK**.<br><br>Result: The **Request** field defaults to *TSTS*. |
| 59 | Select the Test Scores (1) tab. |
| 60 | Click the down arrow below the **Source** field to view the List of Values. |
| 61 | Select *H.S. transcript.* |
| 62 | Click **OK**. |
| 63 | Click the **Save** icon. |
| 64 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

## Lesson: Entering Recruiter Appointments

Jump to TOC

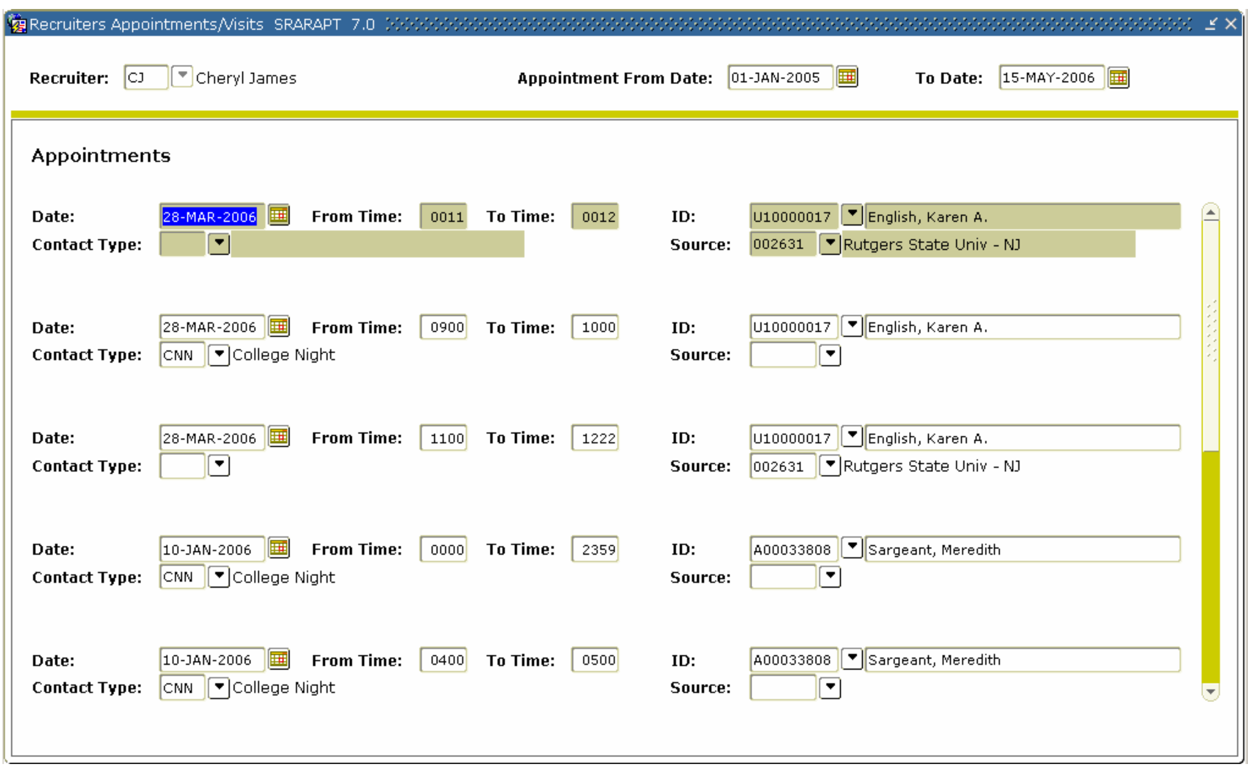
**Purpose**

The Recruiter Appointments/Visits Form (SRARAPT) is used to schedule and record daily appointments on campus and visits to other sources.

Appointments and visits can be viewed for a given day, a period of days, or an entire term. This form can be used to reschedule appointments and visits in the case of an emergency or the absence of a recruiter.

<u>Note</u>: In order to add appointments or visits for a prospect, the prospect must first be established on the Recruit Prospect Information Form (SRARECR).

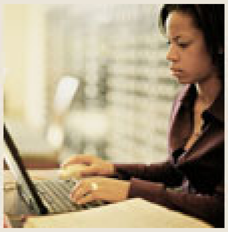
**Banner form**


Recruiters Appointments/Visits SRARAPT 7.0

Recruiter: CJ Cheryl James | Appointment From Date: 01-JAN-2005 | To Date: 15-MAY-2006

Appointments

| Date | From Time | To Time | Contact Type | ID | Source |
|---|---|---|---|---|---|
| 28-MAR-2006 | 0011 | 0012 | | U10000017 English, Karen A. | 002631 Rutgers State Univ - NJ |
| 28-MAR-2006 | 0900 | 1000 | CNN College Night | U10000017 English, Karen A. | |
| 28-MAR-2006 | 1100 | 1222 | | U10000017 English, Karen A. | 002631 Rutgers State Univ - NJ |
| 10-JAN-2006 | 0000 | 2359 | CNN College Night | A00033808 Sargeant, Meredith | |
| 10-JAN-2006 | 0400 | 0500 | CNN College Night | A00033808 Sargeant, Meredith | |





Jump to TOC

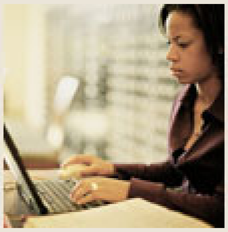
**Exercise**

Prospect 2 has called to make an appointment with a recruiter for the following Monday. Record the appointment for the recruiter.

**Procedure**

Follow these steps to complete the process.

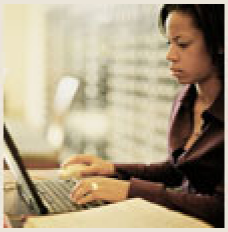
| Step | Action |
|---|---|
| 1 | Access the Recruiter Appointments/Visits Form (SRARAPT). |
| 2 | Enter the recruiter code [*Your Initials*] created previously in the **Recruiter** field. |
| 3 | Enter the following Monday's date in the **Appointment From Date** field using the DD-MMM-YYY format.<br><br><u>Note</u>: You can access the calendar by clicking the calendar icon next to the **Appointment From Date** field. Double-click on the day of the appointment to return it to the field. |
| 4 | Perform a **Next Block** function.<br><br><u>Note</u>: If there are no previous appointments for the recruiter, a warning message will appear at the bottom of the form: *Query caused no records to be retrieved.* |
| 5 | Enter the same date that appears in the key block in the **Date** field. |
| 6 | Enter the starting time for the appointment in the **From Time** field.<br><br><u>Note</u>: Remember to use military time when entering start and end times. 9:00 AM is entered as 0900, and 3:30 PM is entered as 1530.<br><br><u>Warning</u>: If you end an appointment and begin another at the same minute, you'll get a conflict error. Some institutions end one appointment at least one to five minutes between appointments to minimize these errors. |





**Procedure, continued**

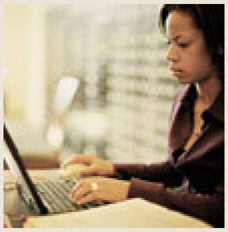
| Step | Action |
|---|---|
| 7 | The meeting is scheduled for fifty minutes. Enter the ending time for the appointment in the **To Time** field. |
| 8 | Enter the ID for the recruiting record that was created previously in the **ID** field. If you do not remember the ID, perform a name search to locate the ID.<br><br>• Leave the **ID** field empty. Tab to the **Name** field (adjacent to the **ID** field).<br><br>• Enter the last name prospect 2 followed by a percent sign.<br>Example: *Smith%*<br><br>• Press the [Enter] key. If one match is found, the ID and name are returned to the key block. If more than one match is found, the ID and Name Extended Search window appears. Pull down the list of matches in the **Search Results** field in the ID and Name Extended Search window. Scroll to the desired name and ID. Click on the desired name and ID. The information will be returned to the key block. |
| 9 | Click the down arrow next to the **Contact Type** field to view the List of Values. |
| 10 | Select *Interview One*. |
| 11 | Click **OK**. |
| 12 | Leave the **Source** field empty. |
| 13 | Click the **Save** icon. |
| 14 | Click the **Exit** icon. |



**Available reports**

The following Banner Reports are used in the Recruitment module.

| Report Description | Banner Name |
|---|---|
| Rec/Enroll Analysis - How Learned Report | SRRENRH |
| Recr/Enrl Analysis - Source/Recr Report | SRRENRL |
| Recruits Never Applied to Inst. Report | SRRINQR |
| Communication Plan Processing Report | SORCPLN |



# Section C: Day-to-Day Operations

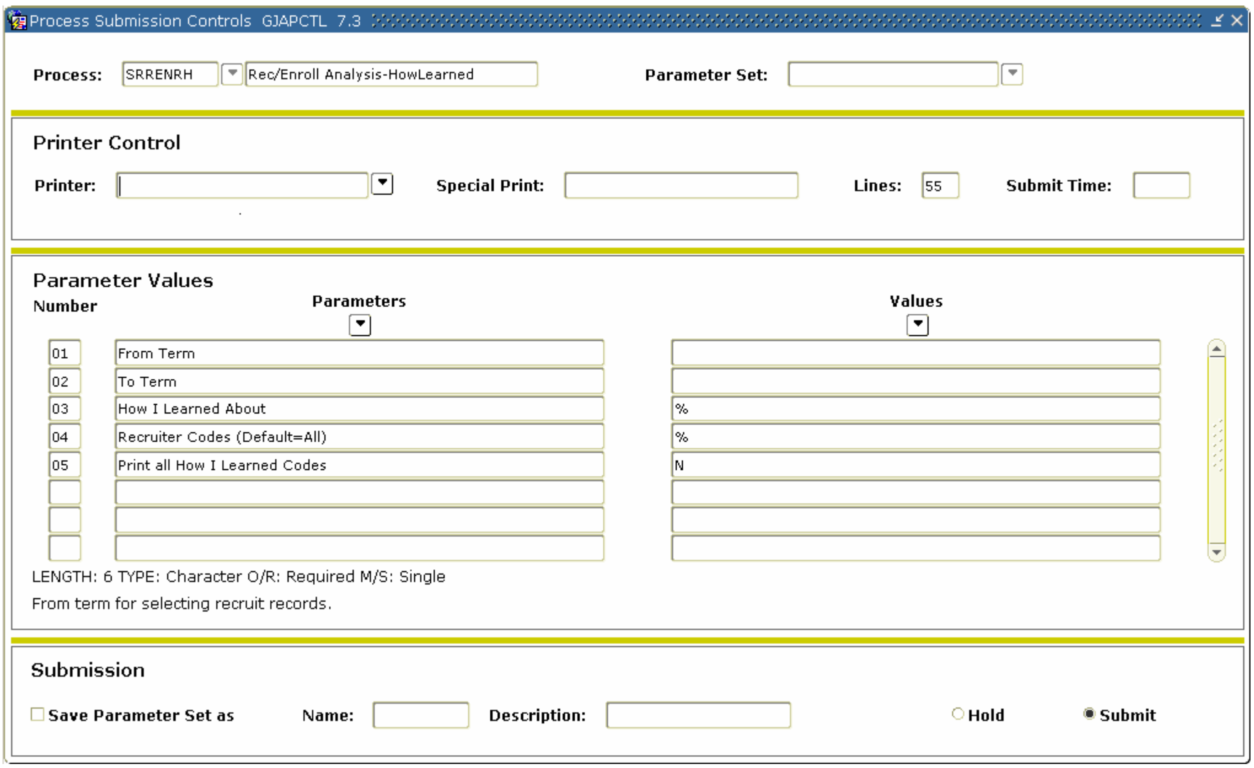
## Lesson: Using the Rec/Enroll Analysis - How Learned Report

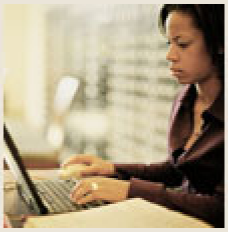
Jump to TOC

### Introduction

The Rec/Enroll Analysis - How Learned Report (SRRENRH) is used to produce a statistical report of recruits, applicants, and enrollees by a How I Learned code for a term range. The data collected are based first on the prospect How I Learned About code and then on term. An optional section may be printed for How I Learned About codes which have no corresponding recruiting data associated with them.

### Banner report







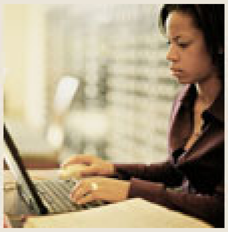
**Procedure**

Follow these steps to run the Rec/Enroll Analysis - How Learned Report (SRRENRH).

| Step | Action |
|---|---|
| 1 | Access the Rec/Enroll Analysis - How Learned Report (SRRENRH). |
| 2 | Perform a **Next Block** function. |
| 3 | Enter the appropriate printer or type *DATABASE* in the **Printer** field. |
| 4 | Perform a **Next Block** function. |
| 5 | Enter the parameters as appropriate.<br><br>Note: Use the table as a guide to the parameters. |

| Parameter | Description | Req? |
|---|---|---|
| From Term | Enter the term code representing the term from which the recruiting enrollment analysis is to be run. | Yes |
| To Term | Enter the term code representing the term to which the recruiting enrollment analysis is to be run. | Yes |
| How I Learned About | Enter the code(s) for the source of the prospect contact, or enter % for all. | No |
| Recruiter Codes (Default = All) | Enter the code(s) for the recruiter(s) to be reported, or enter % for all. | No |
| Print All How I Learned Codes | Enter Y to print the How I Learned About codes which have no associated recruiting records. Enter N to not print this section of the report. | No |

| | |
|---|---|
| 6 | Perform a **Next Block** function. |
| 7 | Click the **Save** icon. |
| 8 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

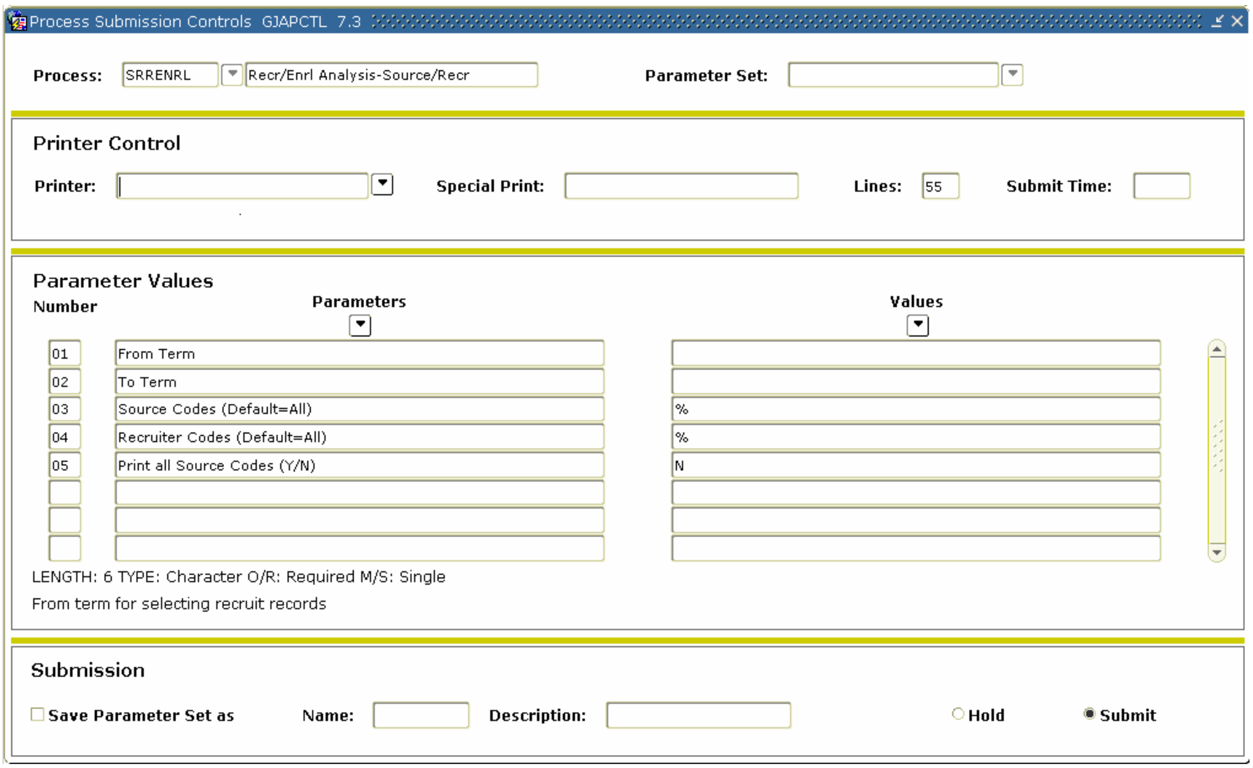
## Lesson: Using the Recr/Enrl Analysis - Source/Recr Report

Jump to TOC

### Introduction

The Recr/Enrl Analysis - Source/Recr Report (SRRENRL) is used to produce a statistical report of recruits, applicants, and enrollees by source and recruiter for a term range. You may print an optional section for source codes which have no corresponding recruiting data associated with them.

### Banner report


Process Submission Controls GJAPCTL 7.3

Process: SRRENRL Recr/Enrl Analysis-Source/Recr
Parameter Set:

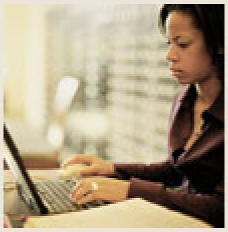
Printer Control
Printer: Special Print: Lines: 55 Submit Time:

Parameter Values

| Number | Parameters | Values |
|---|---|---|
| 01 | From Term | |
| 02 | To Term | |
| 03 | Source Codes (Default=All) | % |
| 04 | Recruiter Codes (Default=All) | % |
| 05 | Print all Source Codes (Y/N) | N |

LENGTH: 6 TYPE: Character O/R: Required M/S: Single
From term for selecting recruit records

Submission
Save Parameter Set as Name: Description: Hold Submit





Jump to TOC

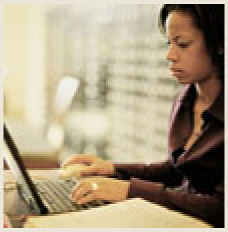
**Procedure**

Follow these steps to run the Recr/Enrl Analysis - Source/Recr Report (SRRENRL).

| Step | Action |
|---|---|
| 1 | Access the Recr/Enrl Analysis - Source/Recr Report (SRRENRL). |
| 2 | Perform a **Next Block** function. |
| 3 | Enter the appropriate printer or type *DATABASE* in the **Printer** field. |
| 4 | Perform a **Next Block** function. |
| 5 | Enter the parameters as appropriate.<br><br>Note: Use the table as a guide to the parameters. |

| Parameter | Description | Req? |
|---|---|---|
| From Term | Enter the term code representing the term from which the recruiting enrollment analysis is to be run. | Yes |
| To Term | Enter the term code representing the term to which the recruiting enrollment analysis is to be run. | Yes |
| Source Codes (Default = All) | Enter the code(s) for the enrollment source(s) to be reported or leave blank for all sources to be included in the analysis. | No |
| Recruiter Codes (Default = All) | Enter the code(s) for the specific recruiter information to be included or leave blank to include all recruiter information. | No |
| Print All Source Codes (Y/N) | Enter Y to print the source codes which have no associated recruiting records. Enter N to not print this section of the report. | No |

| | |
|---|---|
| 6 | Perform a **Next Block** function. |
| 7 | Click the **Save** icon. |
| 8 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

## Lesson: Using the Recruits Never Applied to Inst. Report

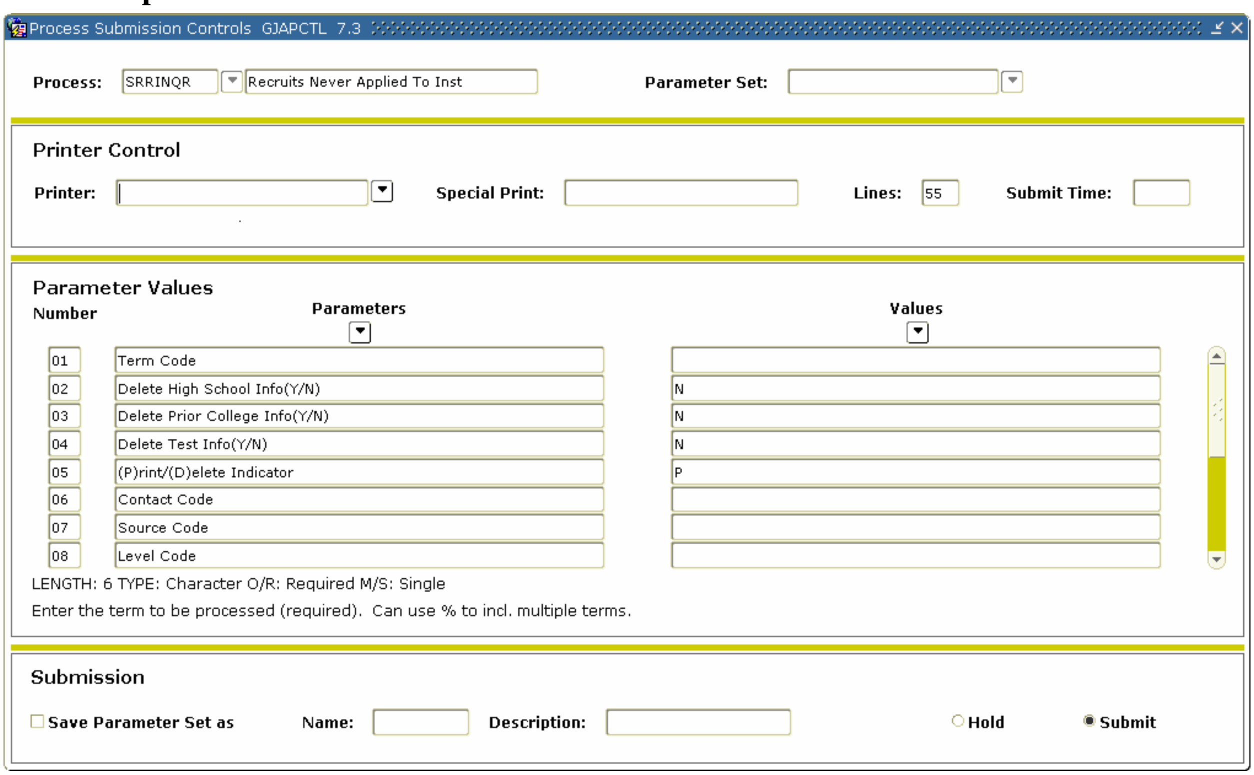
Jump to TOC

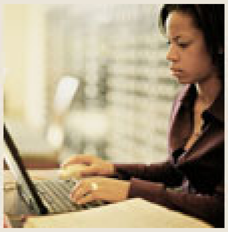
### Introduction

The Recruits Never Applied to Inst. Report (SRRINQR) produces a list of recruits who have no admission records with a term that is greater than or equal to the recruit term specified in the **Term** parameter for the following conditions: where the level of the admissions application is the same as the level of the recruiting record, the primary curriculum degree, and major of the application, or the secondary curriculum degree and the major of the application are the same as the degree and the major of the recruiting term. If multiple recruiting records exist for a person within the same term, each recruiting record is individually compared to each admissions application that may exist for terms greater than or equal to the recruiting term. If any match is found based on the criteria described, the recruit will be selected.

This report is also used to delete recruiting records and high school, prior college, and prior test information. In addition, if the **Delete Indicator** parameter is selected, communication plans, sources, outside interests, cohorts, mail, and comments associated with the recruit will be deleted.

### Banner report







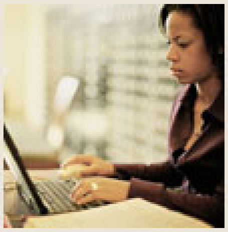
**Procedure**

Follow these steps to run the Recruits Never Applied to Inst. Report (SRRINQR).

| Step | Action |
|---|---|
| 1 | Access the Recruits Never Applied to Inst. Report (SRRINQR). |
| 2 | Perform a **Next Block** function. |
| 3 | Enter the appropriate printer or type *DATABASE* in the **Printer** field. |
| 4 | Perform a **Next Block** function. |
| 5 | Enter the parameters as appropriate.<br><br>Note: Use the table as a guide to the parameters. |

| Parameter | Description | Req? |
|---|---|---|
| Term Code | Enter the term code representing the recruiting term for which you wish to run the report. | Yes |
| Delete High School Info (Y/N) | Enter Y to delete high school information; enter N to save high school information. | Yes |
| Delete Prior College Info (Y/N) | Enter Y to delete prior college information; enter N to save prior college information. | Yes |
| Delete Prior Test Info (Y/N) | Enter Y to delete prior test information; enter N to save prior test information. | Yes |
| (P)rint/(D)elete Indicator | Enter P to print the list of recruits without admission records. Enter D to delete the existing records. | Yes |
| Contact Code | Enter the contact code(s) to be processed. | No |
| Source Code | Enter the source/background institution code(s) to be processed. | No |
| Level Code | Enter the level code to be processed. | No |
| Campus Code | Enter the campus code to be processed. | No |
| College Code | Enter the college code to be processed. | No |
| Degree Code | Enter the degree code to be processed. | No |
| Program Code | Enter the program code to be processed. | No |
| Major Code | Enter the major code to be processed. | No |

| | |
|---|---|
| 6 | Perform a **Next Block** function. |
| 7 | Click the **Save** icon. |
| 8 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

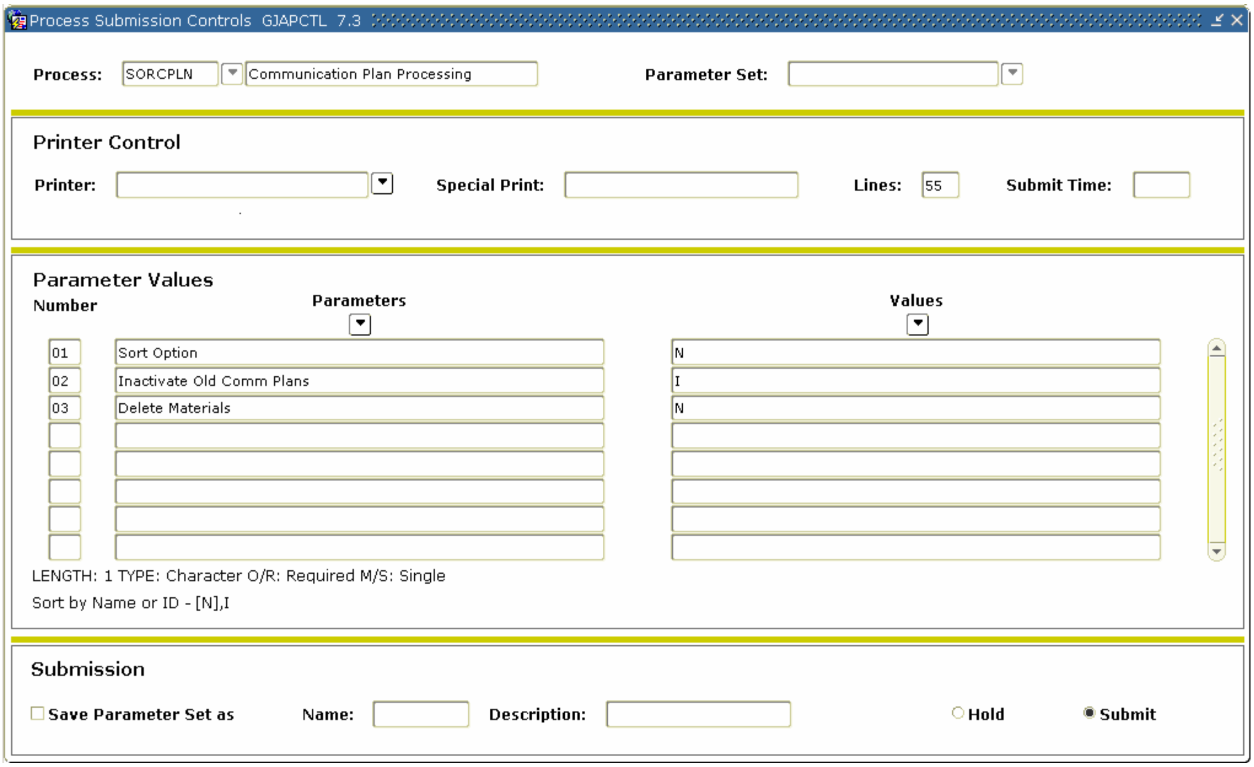
## Lesson: Using the Communication Plan Processing Report

Jump to TOC

### Introduction

The Communication Plan Processing Report (SORCPLN) is used to show a person's movement from an old communication plan to a new communication plan. Old plans may be inactivated or deleted, and old materials associated with plans may be deleted or saved.

### Banner report



Process Submission Controls GJAPCTL 7.3

Process: SORCPLN Communication Plan Processing Parameter Set:

Printer Control

Printer: Special Print: Lines: 55 Submit Time:

Parameter Values

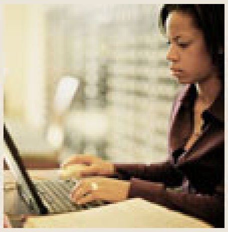
| Number | Parameters | Values |
|---|---|---|
| 01 | Sort Option | N |
| 02 | Inactivate Old Comm Plans | I |
| 03 | Delete Materials | N |

LENGTH: 1 TYPE: Character O/R: Required M/S: Single

Sort by Name or ID - [N],I

Submission

Save Parameter Set as Name: Description: Hold Submit



# Section C: Day-to-Day Operations

## Lesson: Using the Communication Plan Processing Report (Continued)

Jump to TOC

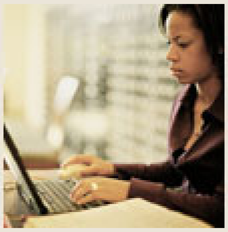
**Procedure**

Follow these steps to run the Communication Plan Processing Report (SORCPLN).

| Step | Action |
|---|---|
| 1 | Access the Communication Plan Processing Report (SORCPLN). |
| 2 | Perform a **Next Block** function. |
| 3 | Enter the appropriate printer or type *DATABASE* in the **Printer** field. |
| 4 | Perform a **Next Block** function. |
| 5 | Enter the parameters as appropriate.<br><br>Note: Use the table as a guide to the parameters. |

| Parameter | Description | Req? |
|---|---|---|
| Sort Option | Enter the sort option for name (*N*) or ID (*I*). | Yes |
| Inactivate Old Communication Plans | Enter *I* to inactivate any old communication plans or *D* to delete old communication plans. | Yes |
| Delete Materials | Enter *Y* to delete materials associated with old communication plans. Enter *N* to save materials associated with old communication plans. | Yes |

| | |
|---|---|
| 6 | Perform a **Next Block** function. |
| 7 | Click the **Save** icon. |
| 8 | Click the **Exit** icon. |



# Section C: Day-to-Day Operations

## Lesson: Summary

Jump to TOC

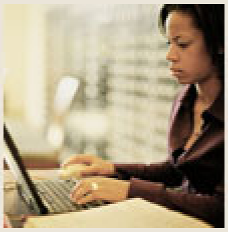
**Let's review**

As a result of completing this workbook, you have

- set all the rules and processing parameters for handling recruitment
- captured information on applicants
- ensured that duplicate records are not created
- entered prospects using the Quick Recruit Form
- entered high school and prior college information
- entered tests and test scores
- entered recruiter appointments
- run reports related to the Recruitment module.

**Next steps**

The next step is for prospects to apply to your institution. The Admissions Office continues the process by accepting new applicants.



# Section C: Day-to-Day Operations

## Lesson: Self Check

Jump to TOC

**Directions**

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

**Question 1**

A prospect can have multiple recruiting records for the same term.

True / False

**Question 2**

A prospect's recruiting record can be rolled forward to the Admissions module after a withdrawal reason is entered.

True / False

**Question 3**

On the SRARECR form, if there is an exact match between a recruit record and an application or a student record for the same term, level, degree, and major, the **Applied** or **Accepted** field is updated with:

a) a Y
b) an N
c) an E
d) none of the above.

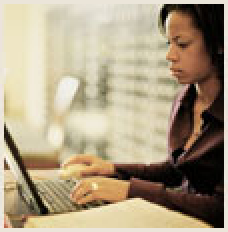
**Question 4**

What values will appear in the **Registered** field on the Quick Recruit Form? What do these values mean?

**Question 5**

A recruit record needs to exist before entering high school information.

True / False






Jump to TOC

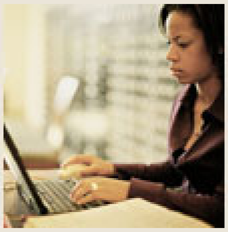

**Question 6**

In what manner can test scores be marked as revised/reentered?

a) Revised
b) Reentered
c) Both revised and reentered
d) Neither revised nor reentered (empty field)
e) All of the above

**Question 7**

Appointments established on the Recruiter Appointments and Visits Form also can be viewed from what other form?





**Let's review**

Review your answers to the Self-Check exercise on the previous pages. Answers are shown in **bold** text.

**Question 1**

A prospect can have multiple recruiting records for the same term.

**True**

**Question 2**

A prospect's recruiting record can be rolled forward to the Admissions module after a withdrawal reason is entered.

**False**

**Question 3**

On the SRARECR form, if there is an exact match between a recruit record and an application or a student record for the same term, level, degree, and major, the **Applied** or **Accepted** field is updated with…

a) a Y
b) an N
c) **an E**
d) none of the above.

**Question 4**

What values will appear in the **Registered** field on the Quick Recruit Form? What do these values mean?

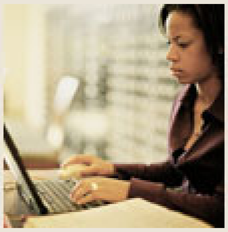
**Y = yes. The prospect (now student) has registered.**

**N = no. The prospect (now student) has not registered.**

**Question 5**

A recruit record needs to exist before entering high school information.

**False**





Jump to TOC

**Question 6**

In what manner can test scores be marked as revised/reentered?

a) revised
b) reentered
c) both revised and reentered
d) neither revised nor reentered (empty field)
**e) all of the above**

**Question 7**

Appointments established on the Recruiter Appointments and Visits Form also can be viewed from what other form?

**The Person Appointments/Contacts Form (SOAAPPT)**

# Section D: Reference

## Lesson: Overview

Jump to TOC

### Introduction

The purpose of this section is to provide reference materials related to the workbook.

### Section contents

# Section D: Reference

## Lesson: Setup Forms and Where Used

Jump to TOC

**Guide**

Use this table as a guide to the setup forms and the day-to-day forms that use them.

Before entering recruiting information, there are several forms and validations outside of Recruitment that need to be set or created.

The following validation forms play important roles in the Recruitment module; however, they will be setup prior to any setup that is specific to the Recruitment module.

Warning: Since these forms are shared with other modules, it is important that the appropriate members of the Student team be involved in their setup.

| Setup Form | | Day-to-Day Form(s) | |
|---|---|---|---|
| **Form Name** | **Code** | **Form Name** | **Code** |
| Contact Type Code Validation | STVCTYP | Recruit Prospect Information<br>Person Appts/Contacts | SRARECR<br>SOAAPPT |
| Address Type Code Validation | STVATYP | Identification Form | SPAIDEN |
| Recruiter Code Validation | STVRECR | Recruit Prospect Information | SRARECR |
| Recruit Type Validation | STVRTYP | Recruit Prospect Information | SRARECR |
| Originator Code Validation | STVORIG | Person Comment | SPACMNT |
| Web Prospect How I Learned About Validation | STVLEND | Recruit Prospect Information | SRARECR |
| Recruiting Internal Status Code Validation | STVRSTA | Recruit Prospect Information | SRARECR |
| Appointment Result Code Validation | STVRSLT | Person Appts/Contacts | SOAAPPT |
| Comment Type Code Validation | STVCMTT | Person Comment | SPACMNT |
| Outside Interest Code Validation | STVINTS | Recruit Prospect Information | SRARECR |

# Section D: Reference

## Lesson: Day-to-Day Forms and Setup Needed

Jump to TOC

**Guide**

Use this table as a guide to the day-to-day forms and the setup forms needed for each.

| Day-to-Day Form | Setup Forms Needed |
|---|---|
| General Person Identification (SPAIDEN) | • Name Type Validation (GTVNTYP)<br>• Address Type Code Validation (STVATYP)<br>• Telephone Type Validation (STVTELE)<br>• State/Province Code Validation (STVSTAT)<br>• Zip/Postal Code Validation (GTVZIPC)<br>• County Code Validation (STVCNTY)<br>• Nation Code Validation (STVNATN)<br>• Address Source Validation (STVASRC)<br>• Citizen Type Code Validation (STVCITZ)<br>• Ethnic Code Validation (STVETHN)<br>• Marital Status Code Validation (STVMRTL)<br>• Religion Code Validation (STVRELG)<br>• Legacy Code Validation (STVLGCY)<br>• E-mail Address Type Validation (GTVEMAL)<br>• Relation Code Validation (STVRELT) |

# Section D: Reference

## Lesson: Day-to-Day Forms and Setup Needed (Continued)

Jump to TOC

| Day-to-Day Form | Setup Forms Needed |
|---|---|
| Recruit Prospect Information (SRARECR)<br><br>Quick Recruit (SAAQUIK) | • Term Code Validation (STVTERM)<br>• Recruiter Code Validation (STVRECR)<br>• Recruit Type Validation (STVRTYP)<br>• Recruiting Internal Status Code Validation (STVRSTA)<br>• Residence Code Validation (STVRESD)<br>• Site Code Validation (STVSITE)<br>• Session Code Validation (STVSESS)<br>• Education Level Code Validation (STVEDLV)<br>• Education Goal Validation (STVEGOL)<br>• Curriculum Rules (SOACURR)<br>• Campus Code Validation (STVCAMP)<br>• College Code Validation (STVCOLL)<br>• Learner Field of Study Type Validation (GTVLFST)<br>• Learner Curriculum Activity Validation (STVCACT)<br>• Curriculum Status Validation (STVCSTS)<br>• Major, Minor, Concentration Code Validation (STVMAJR)<br>• Department Code Validation (STVDEPT)<br>• Source/Background Institution Code Validation (STVSBGI)<br>• Source/Background Institution Base (SOASBGI)<br>• Outside Interest Code Validation (STVINTS)<br>• Contact Type Code Validation (STVCTYP)<br>• Cohort Code Validation (STVCHRT)<br>• Student Attribute Validation (STVATTS)<br>• Originator Code Validation (STVORIG)<br>• Web Prospect How I Learned About Validation (STVLEND) |
| High School Information (SOAHSCH) | • Source/Background Institution Code Validation (STVSBGI)<br>• Source/Background Institution Base (SOASBGI)STVDPLM<br>• Admission Request Checklist Code Validation (STVADMR) |



Jump to TOC

**Procedure, continued**

| Day-to-Day Form | Setup Forms Needed |
|---|---|
| Prior College (SOAPCOL) | • Degree Code Validation (STVDEGC)<br>• College Code Validation (STVCOLL)<br>• Institutional Honors Code Validation (STVHONR) |
| Test Score Information (SOATEST) | • Test Code Validation (STVTESC)<br>• Test Form Validation (STVTEFR)<br>• Test Purpose Validation (STVTEPR)<br>• Test Accommodation Validation (STVTEAC)<br>• Test Score Administration Type Code Validation (STVTADM)<br>• Admission Test Score Source Code Validation (STVTSRC) |
| Recruiter Appointments/Visits (SRARAPT) | • Recruiter Code Validation (STVRECR)<br>• Contact Type Code Validation (STVCTYP) |



**Guide**

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

| Form Name | Form Description | Owner |
|---|---|---|
| **Rules and Validation Tables Outside of the Recruitment Module** | | |
| SPAIDEN | General Person Identification | |
| SPAPERS | General Person | |
| STVSBGI | Source/Background Institution Code Validation Form | |
| SOASBGI | Source/Background Institution Base | |
| SOABGIY | Source/Background Institution Year | |
| SOABGTA | Transfer Articulation Institution | |
| STVTERM | Term Code Validation | |
| STVMAJR | Major, Minor, Concentration Code Validation | |
| STVLEVL | Level Code Validation | |
| STVCAMP | Campus Code Validation | |
| STVDEGC | Degree Code Validation | |
| STVDEPT | Department Code Validation | |
| STVCOLL | College Code Validation | |
| STVSTYP | Student Type Code Validation | |
| STVADMT | Admission Type Code Validation | |
| STVWRSN | Withdrawal Reason Code Validation | |
| STVAPDC | Admission Application Decision Code Validation | |
| STVAPST | Admission Application Status Code Validation | |
| STVEPSC | Enrollment Planning Service Code Validation | |
| STVGEOR | Geographic Region Code Validation | |
| STVGEOD | Geographic Region Division Code Validation | |
| STVATTS | Student Attribute Validation | |
| STVCHRT | Cohort Code Validation | |
| SOACURR | Curriculum Rules | |
| SOACTRL | Curriculum Rules Control | |



Jump to TOC

**Procedure, continued**

| Form Name | Form Description | Owner |
|---|---|---|
| **Rules and Validation Tables Outside of the Recruitment Module** | | |
| STVRESD | Residence Code Validation | |
| STVSITE | Site Code Validation | |
| STVSESS | Session Code Validation | |
| STVEDLV | Education Level Code Validation | |
| STVEGOL | Education Goal Validation | |
| STVADMR | Admission Request Checklist Code Validation | |
| STVDPLM | Diploma Type Validation | |
| STVSBJC | High School Subject Validation | |
| STVHONR | Institutional Honors Code Validation | |
| STVTESC | Test Code Validation | |
| STVEPRT | Enrollment Verification Type Code Validation | |
| STVTEFR | Test Form Validation | |
| STVTEAC | Test Accommodation Validation | |
| STVTEIN | Test Instrument Validation | |
| STVCMTT | Comment Type Code Validation | |
| STVORIG | Originator Code Validation | |
| STVPTYP | Source Contact Person Type Code Validation | |
| SMAPRLE | Program Definition Rules | |
| **Validation Forms Needed for the Recruitment Module** | | |
| STVCTYP | Contact Type Code Validation | |
| STVATYP | Address Type Code Validation | |
| STVRECR | Recruiter Code Validation | |
| STVRTYP | Recruit Type Validation | |
| STVORIG | Originator Code Validation | |
| STVLEND | Web Prospect How I Learned About Validation | |
| STVRSTA | Recruiting Internal Status Code Validation | |
| STVRSLT | Appointment Result Code Validation | |



Jump to TOC

**Procedure, continued**

| Form Name | Form Description | Owner |
|---|---|---|
| **Validation Forms Needed for the Recruitment Module** | | |
| STVCMTT | Comment Type Code Validation | |
| STVINTS | Outside Interest Code Validation | |
| **Communication Plan Forms** | | |
| GTVLETR | Letter Code Validation | |
| GTVEMAL | Email Address Type Validation | |
| GUALETR | Letter Process | |
| GUAPARA | Paragraph Process | |
| SUAMAIL | Student Mail | |
| SOAMATL | Material | |
| SOAPLAN | Communication Plan Assignment | |
| SOACCOL | Communication Plan Collector | |
| SOACGRP | Communication Group | |
| SOACPLN | Communication Plan | |
| SOACOMM | Communication Rules | |
| SOADPMR | Duplicate Material Rules | |
| SOAELTL | HTML Letter Rules | |
| SOAELTR | Format HTML Letter Rules | |
| **Day-to-Day Forms** | | |
| SPAIDEN | General Person Identification | |
| SRARECR | Recruit Prospect Information | |
| SRAQUIK | Quick Recruit | |
| SOAHSCH | High School Information | |
| SOAPCOL | Prior College | |
| SOATEST | Test Score Information | |
| SRARAPT | Recruiter Appointments/Visits | |

# Release Date

Jump to TOC

This workbook was last updated on 05/01/2005.