Banner Student
Recruitment Training Workbook

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Revision History Log

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

Table of Contents

Introduction

Course 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.

Course objectives

In this course you will learn how to

- create the rules and set parameters used to process the Recruitment data.
- 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.

Intended audience

Personnel from offices responsible for entering recruiting information

Prerequisites

To complete this course, you should have

- completed the Education Practices computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system
- administrative rights to create and perform the necessary set up in Banner
- set up the validation forms outside of the Recruitment Module noted in "Rules and Validation Tables Outside of the Recruitment Module" prior to any setup that is specific to the Recruitment module.

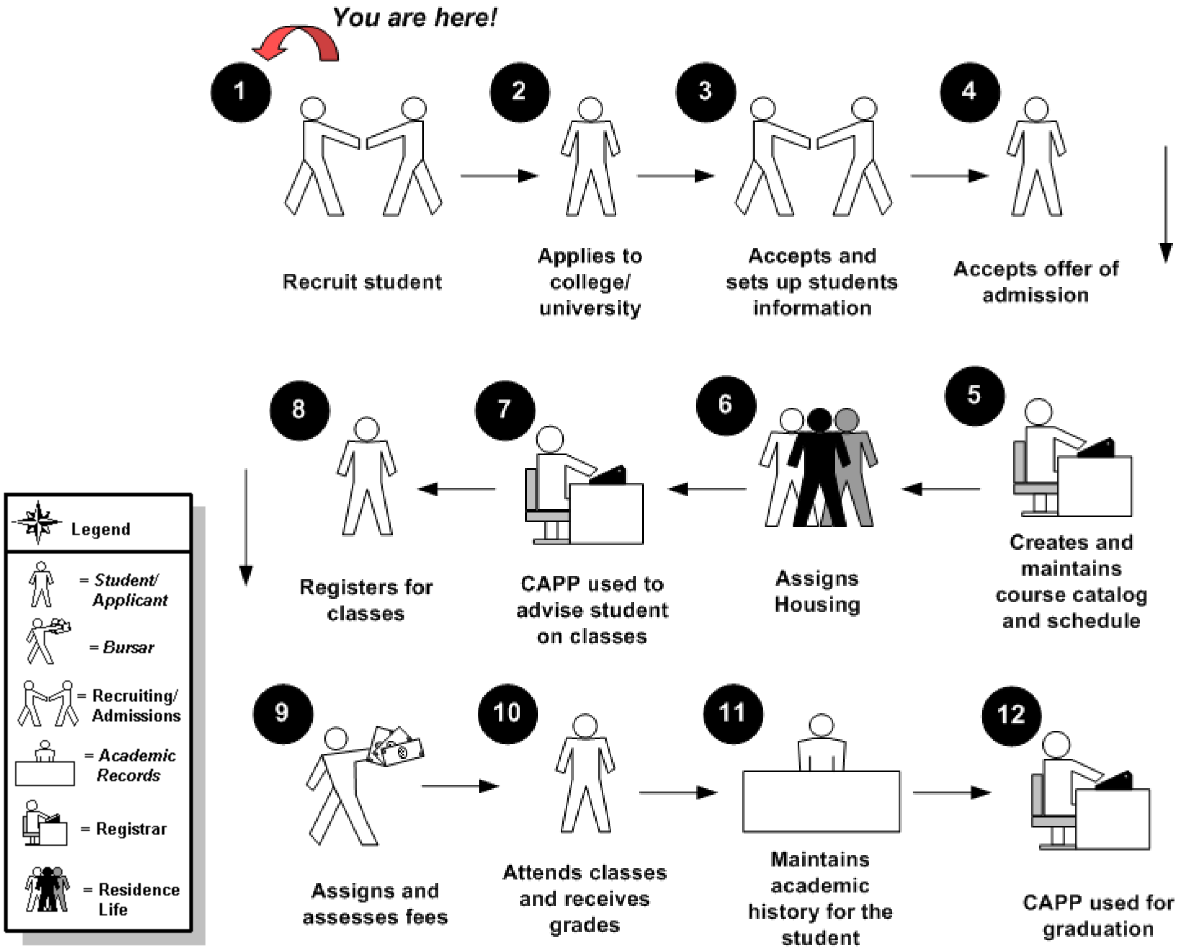
Process Introduction

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.



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.

Set Up

Section goal

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

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

Objectives

In this section you will learn how to create the rules and set parameters used to process the data.

Rules and Validation Tables Outside of the Recruitment Module

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

Form Description	Banner Name
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
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

Form Description	Banner Name
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.

Source/Background Institution Code Validation

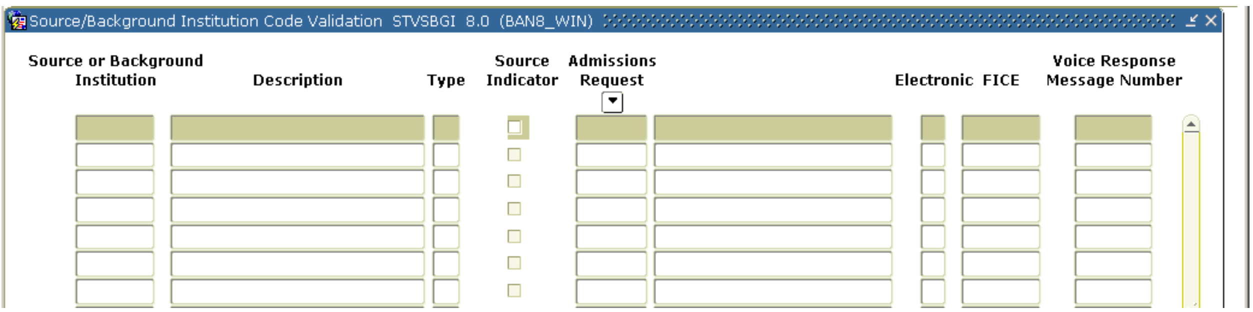
Purpose

The Source/Background Institution Code Validation Form (STVSBGI) is used to create, update, insert, and delete source/background institution codes.

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



Steps

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

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.

   Example: *ABC1*
5. Enter [*Your Initials*] *College* in the **Description** field.

   Example: *ABC College*
6. Enter *C* in the **Type** field.

   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.

    Example: *ABC2*
12. Enter [*Your Initials*] *High School* in the **Description** field.

    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.

17. Perform an **Insert Record** function.

18. Enter [*Your Initials*]*3* in the **Source or Background Institution** field to create a source code.

    Example: *ABC3*

19. Enter [*Your initials*] *Source* in the **Description** field.

    Example: *ABC Source*

20. Enter *S* in the **Type** field.

21. Select the **Source Indicator** checkbox.

22. Click the **Save** icon.

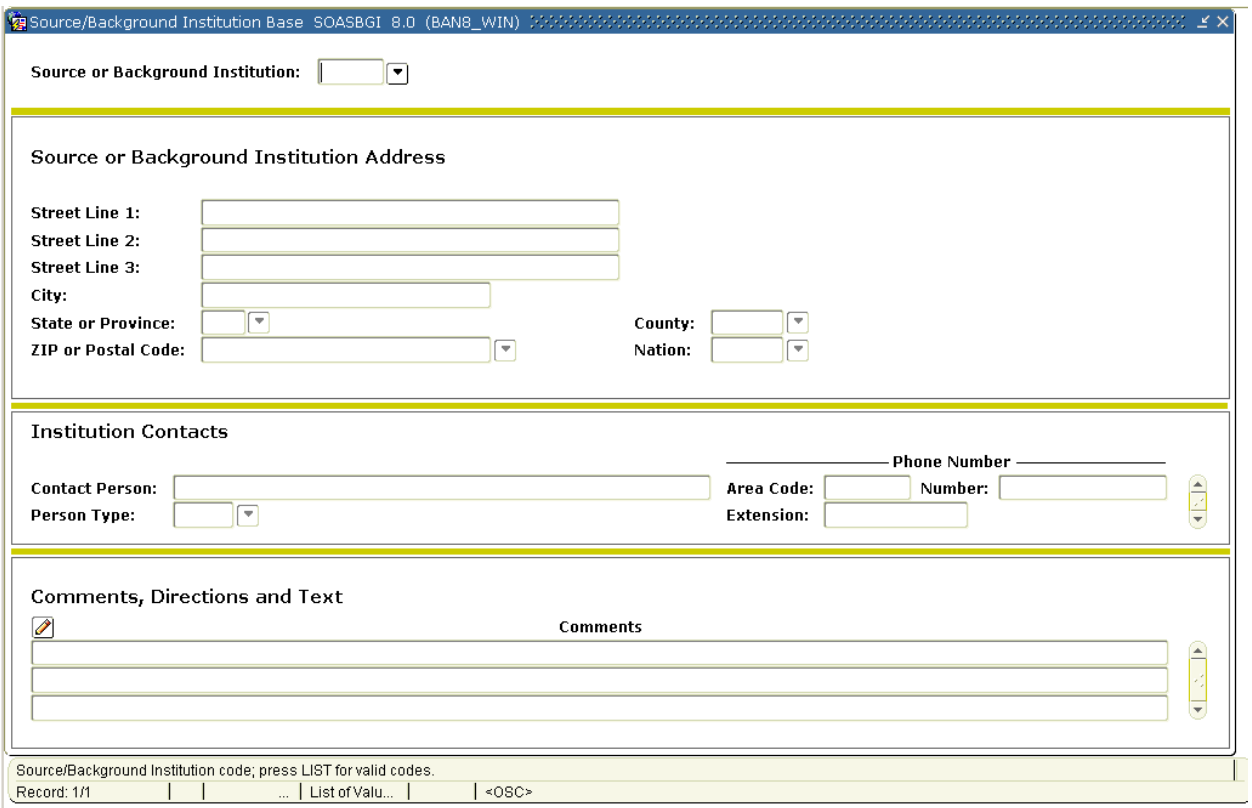
23. Click the **Exit** icon.

Source/Background Institution Base

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



Steps

Follow these steps to establish source/background information.

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.

   Result: 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.

   Note: 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.

    Result: This populates the institution field.

15. Perform a **Next Block** function to navigate to the Source/Background Institution Address block.

16. Establish an address for the high school by filling in the **Street Line**, **City**, **State or Province**, and **Zip or Postal Code** fields.

    Note: To find your zip/postal code, click the down arrow and select your zip/postal code by double-clicking.

    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.

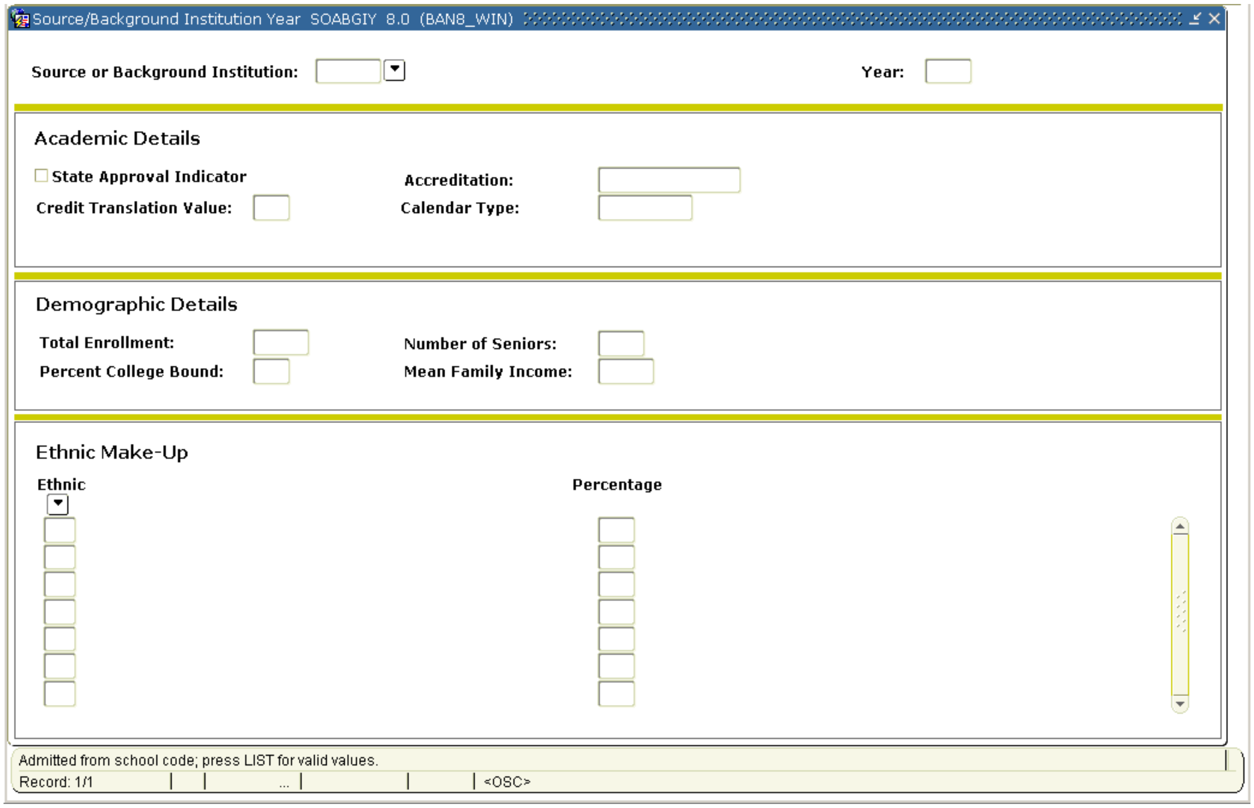
Source/Background Institution Year

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



Steps

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

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.

   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.

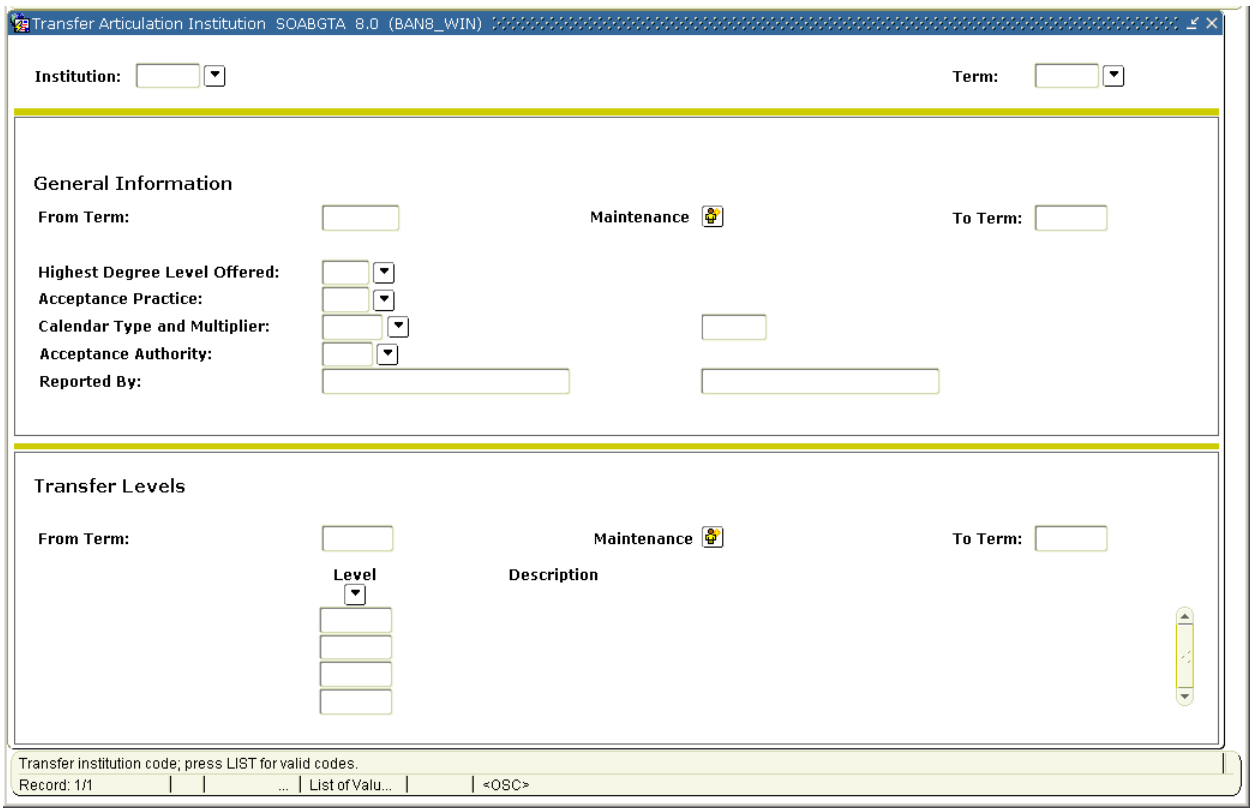
Transfer Articulation Institution

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.

The Transfer Articulation Institution Form (SOABGTA) captures and maintains information pertaining to the transfer institution and its articulation practices, calendar type, transfer levels, and any comment information. The key to the form is the institution code and the effective term associated with the transfer information. Transfer institution information can be built for either a college or high school.

Banner form



Steps

Use the following steps to enter information about an institution.

1. Select an institution from the drop down list in the **Institution** field.

2. Select a term code from the list of valid terms in the **Term** field.

3. Perform a **Next Block** function to navigate to the General Information block.

4. Enter a term code in the **From Term** field.

5. Enter a term code in the **To Term** field.

6. Click on the **Maintenance** button to copy or end the General Information.

7. Select the highest degree offered code from the List of Values in the **Highest Degree Level Offered** field.

8. Select the acceptance practice code from the List of Values in the **Acceptance Practice** field.

9. Select the calendar type and multiplier code from the List of Values in the **Calendar Type and Multiplier** field.

10. Select the acceptance authority code from the List of Values in the **Acceptance Authority** field.

11. Enter the User ID of the individual who reported this information in the **Reported by** field.

12. Navigate to the Transfer Levels block by positioning your cursor in one of the fields or by performing a **Next Block** function.

    Note that the from and to term codes are copies into the Transfer Levels block from the Key block.

13. Select one or more level codes from the List of Values in the **Level** field.

14. Click on the **Maintenance** button to copy or end the Transfer Levels.

15. Click on the **Save** icon.

16. Click on the **Exit** icon.

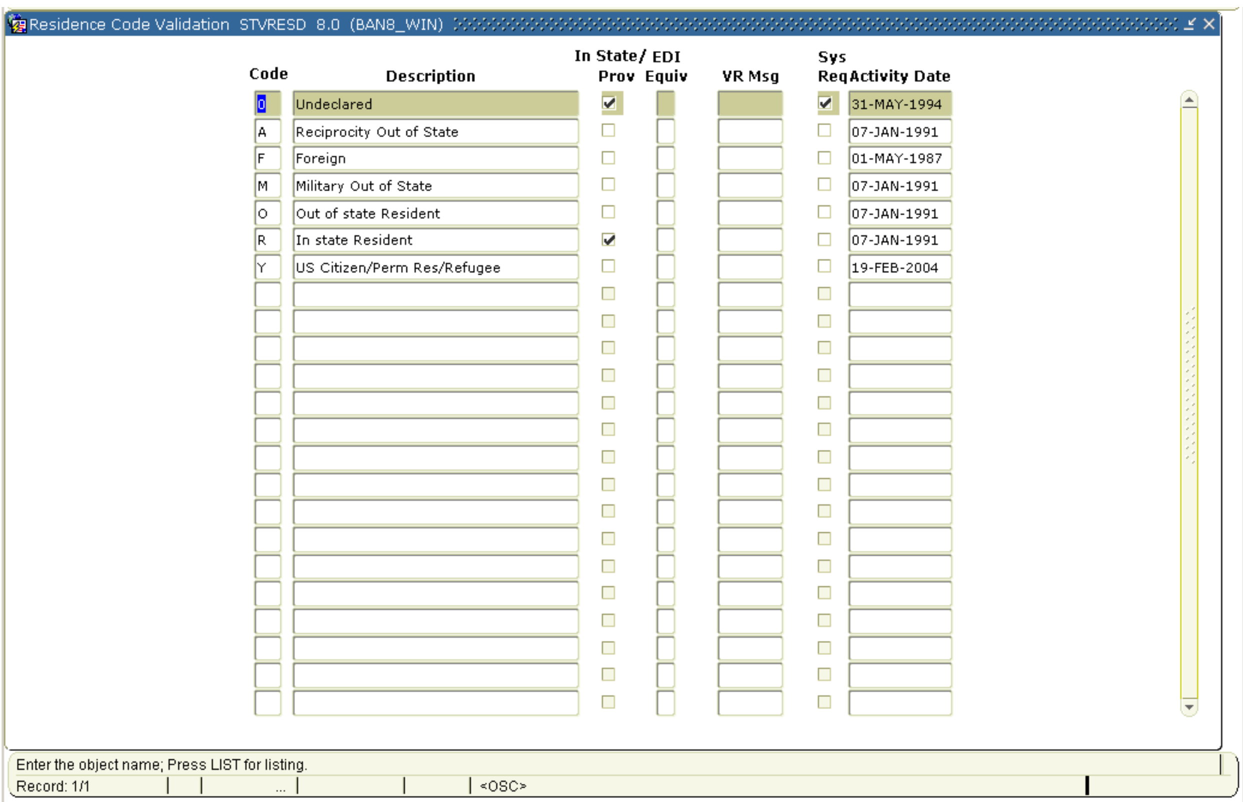
Residence Code Validation

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.

Note: Each participant in this class must create a different residence code.

Banner form


Residence Code Validation STVRESD 8.0 (BAN8_WIN)

Code	Description	In State/ Prov	EDI Equiv	VR Msg	Sys Req	Activity Date
0	Undeclared	☑			☑	31-MAY-1994
A	Reciprocity Out of State	☐			☐	07-JAN-1991
F	Foreign	☐			☐	01-MAY-1987
M	Military Out of State	☐			☐	07-JAN-1991
O	Out of state Resident	☐			☐	07-JAN-1991
R	In state Resident	☑			☐	07-JAN-1991
Y	US Citizen/Perm Res/Refugee	☐			☐	19-FEB-2004

Enter the object name; Press LIST for listing.
Record: 1/1 ... <OSC>

Steps

Follow these steps to create a residence code.

1. Access the Residence Code Validation Form (STVRESD).

2. Perform an **Insert Record** function.

3. Enter a unique residence code in the **Code** field.

   Hint: Select a character from *A* to *Z.*

4. Enter your name in the **Description** field.

5. Select the **In State/Prov** checkbox.

   Note: 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.

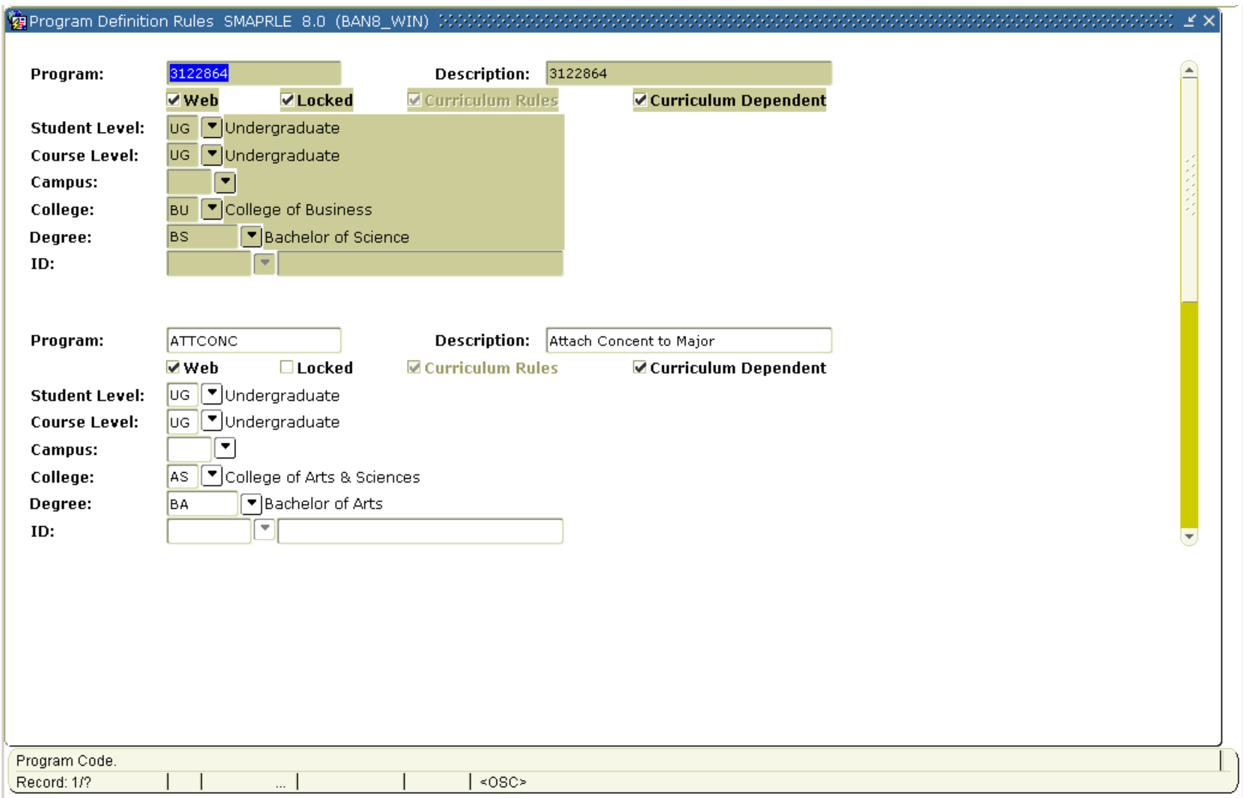
Program Definition Rules

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



Steps

Follow these steps to create a program definition rule.

1. Access the Program Definition Rules Form (SMAPRLE).
2. Perform an **Insert Record** function.
3. Enter [*Your Initials*] in the **Program** field. This is the program code.

   Example: *ABC*
4. Enter [*Your Initials*] *Program* in the **Description** field.

   Example: *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).

   Examples: *Undergraduate*, *Graduate*, *Law*
9. Click **OK**.
10. Click the down arrow next to the **Course Level** field to access the Level Code Validation window.

    Note: 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.

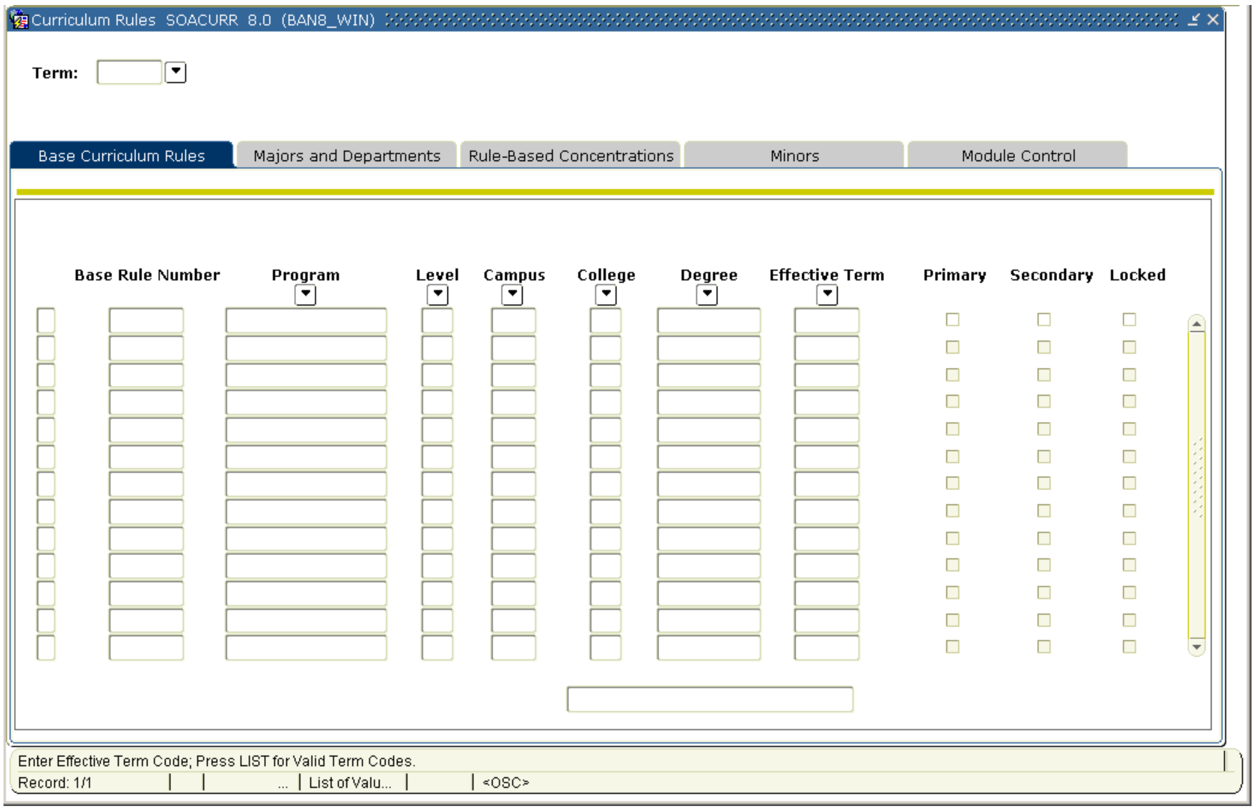
22. Click the **Exit** icon.

Curriculum Rules

Purpose

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

Banner form



Steps

Follow these steps to create a curriculum rule.

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.

   Result: 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.

26. Select the **Module Control** tab.

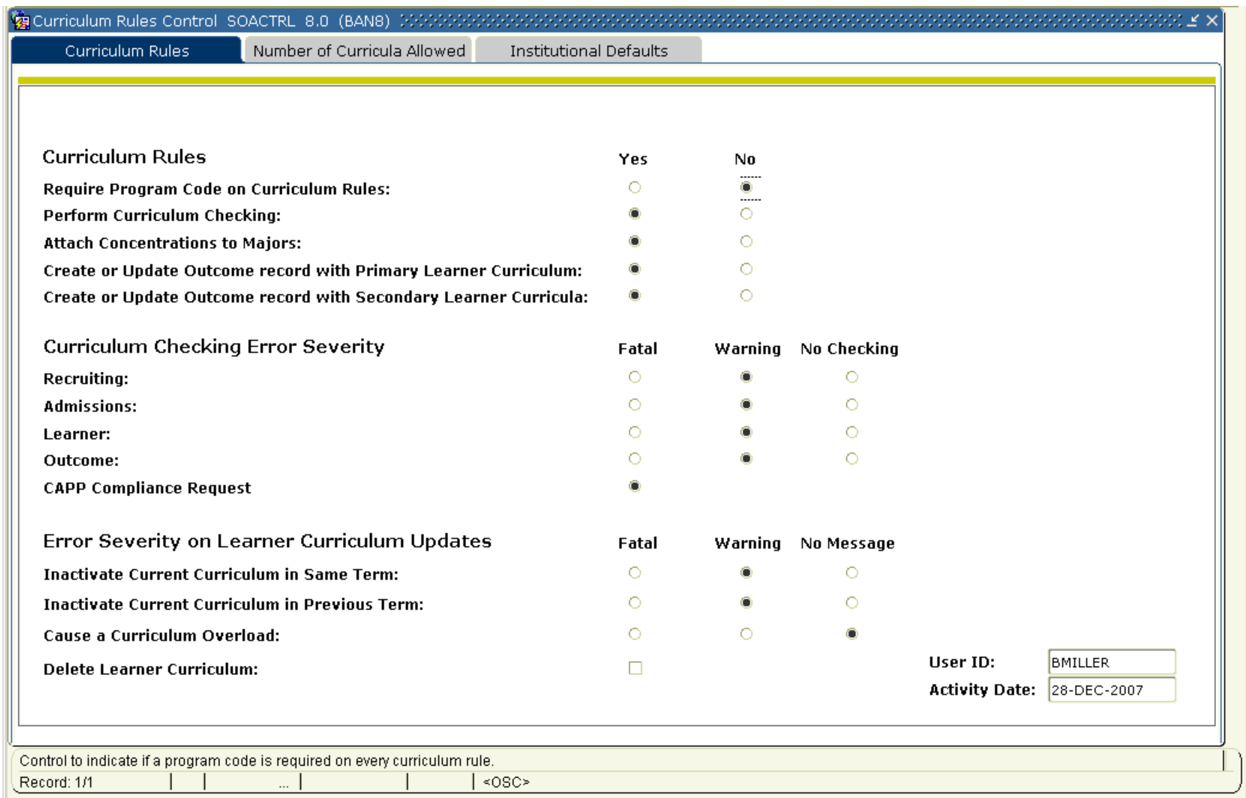
    Note: Indicators default to **On** for each module for the curriculum rule. The **No** option is used to retire use of the curriculum rule for a module.

Curriculum Rules Control

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 8.0 (BAN8)

Curriculum Rules | Number of Curricula Allowed | Institutional Defaults

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:	○	○	●
Delete Learner Curriculum:	☐		

User ID: BMILLER
Activity Date: 28-DEC-2007

Control to indicate if a program code is required on every curriculum rule.
Record: 1/1 ... <OSC>

Steps

Follow these steps to complete the Curriculum Rules Control Form (SOACTRL).

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.*

   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).

   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.

Validation Forms Needed for the Recruitment Module

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.

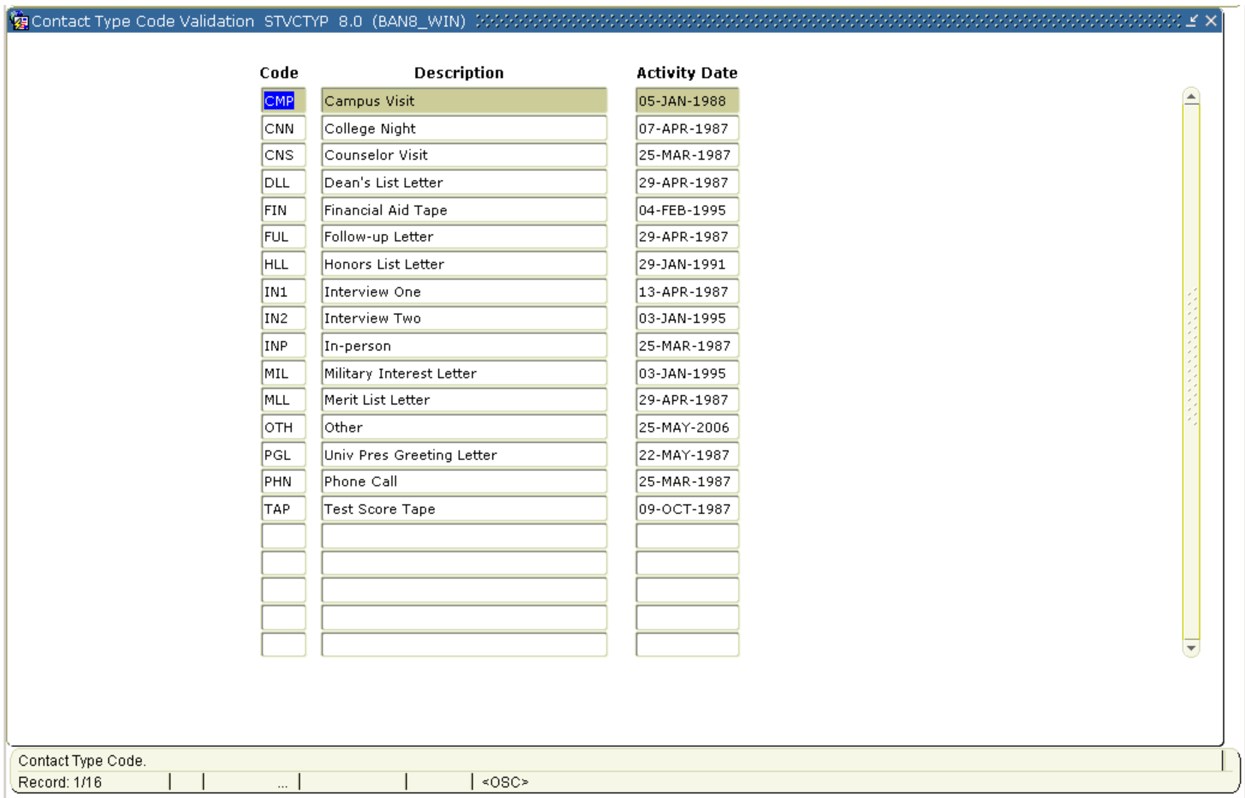
Form Description	Banner Name
Contact Type Code Validation	STVCTYP
Address Type Code Validation	STVATYP
Recruiter Code Validation	STVRECR
Recruit Type Validation	STVRTYP
Originator Code Validation	STVORIG
Web Prospect How I Learned About Validation	STVLEND
Recruiting Internal Status Code Validation	STVRSTA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

Contact Type Code Validation

Purpose

The Contact Type Code Validation Form (STVCTYP)

Banner form



Code	Description	Activity Date
CMP	Campus Visit	05-JAN-1988
CNN	College Night	07-APR-1987
CNS	Counselor Visit	25-MAR-1987
DLL	Dean's List Letter	29-APR-1987
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
MIL	Military Interest Letter	03-JAN-1995
MLL	Merit List Letter	29-APR-1987
OTH	Other	25-MAY-2006
PGL	Univ Pres Greeting Letter	22-MAY-1987
PHN	Phone Call	25-MAR-1987
TAP	Test Score Tape	09-OCT-1987

Steps

Follow these steps to create a contact type code.

1. Access the Contact Type Code Validation Form (STVCTYP).
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 **Activity Date** field empty.

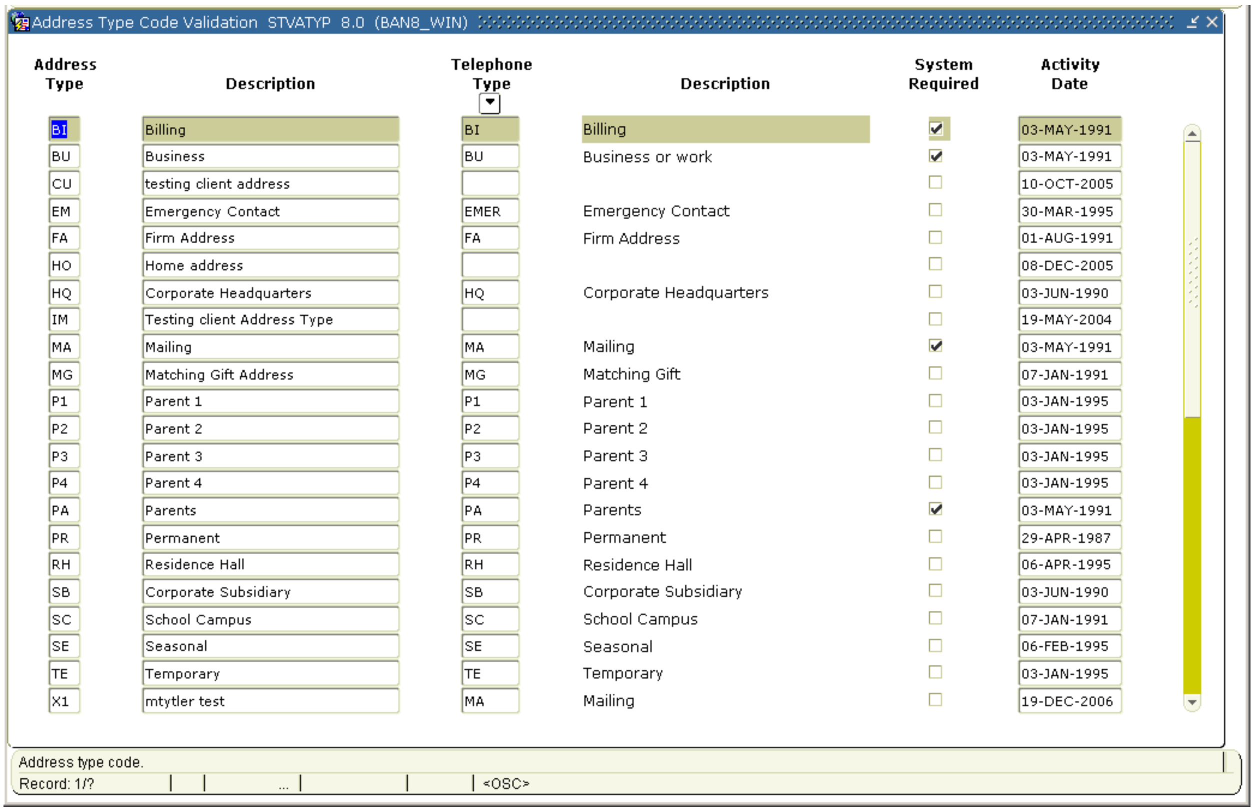
   Note: The field auto-populates with the current date when you save.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Address Type Code Validation

Purpose

The Address Type Code Validation Form (STVATYP)

Banner form



Address Type Code Validation STVATYP 8.0 (BAN8_WIN)

Address Type	Description	Telephone Type	Description	System Required	Activity Date
BI	Billing	BI	Billing	☑	03-MAY-1991
BU	Business	BU	Business or work	☑	03-MAY-1991
CU	testing client address			☐	10-OCT-2005
EM	Emergency Contact	EMER	Emergency Contact	☐	30-MAR-1995
FA	Firm Address	FA	Firm Address	☐	01-AUG-1991
HO	Home address			☐	08-DEC-2005
HQ	Corporate Headquarters	HQ	Corporate Headquarters	☐	03-JUN-1990
IM	Testing client Address Type			☐	19-MAY-2004
MA	Mailing	MA	Mailing	☑	03-MAY-1991
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	☑	03-MAY-1991
PR	Permanent	PR	Permanent	☐	29-APR-1987
RH	Residence Hall	RH	Residence Hall	☐	06-APR-1995
SB	Corporate Subsidiary	SB	Corporate Subsidiary	☐	03-JUN-1990
SC	School Campus	SC	School Campus	☐	07-JAN-1991
SE	Seasonal	SE	Seasonal	☐	06-FEB-1995
TE	Temporary	TE	Temporary	☐	03-JAN-1995
X1	mtytler test	MA	Mailing	☐	19-DEC-2006

Address type code.
Record: 1/? ... <OSC>

Steps

Follow these steps to add a code to the Address Type Code Validation form (STVATYP).

1. Access the Contact Type Code Validation Form (STVCTYP).
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 **Activity Date** field empty.

   Note: The field auto-populates with the current date when you save.

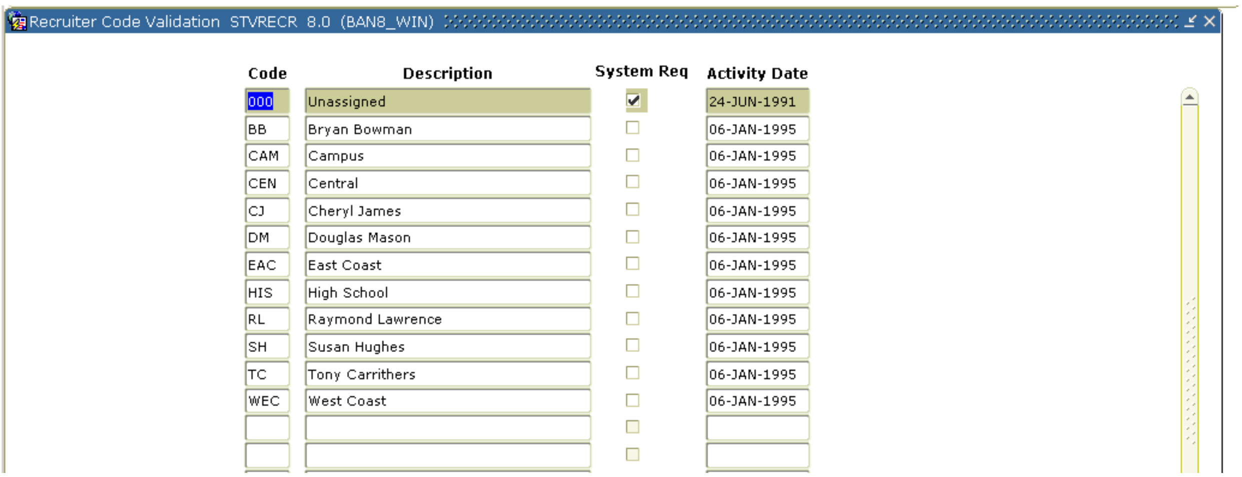
6. Click the **Save** icon.

7. Click the **Exit** icon.

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 8.0 (BAN8_WIN)

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
RL	Raymond Lawrence	☐	06-JAN-1995
SH	Susan Hughes	☐	06-JAN-1995
TC	Tony Carrithers	☐	06-JAN-1995
WEC	West Coast	☐	06-JAN-1995

Steps

Follow these steps to create a recruiter code.

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.

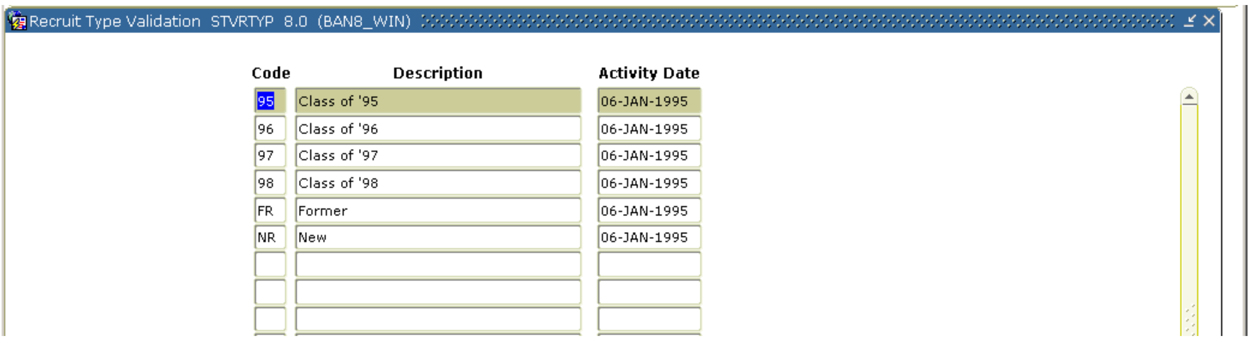
   Note: The field auto-populates with the current date when you save.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Recruit Type Validation

Purpose

The Recruit Type Validation Form (STVRTYP)

Banner form


Recruit Type Validation STVRTYP 8.0 (BAN8_WIN)

Code	Description	Activity Date
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

Steps

Follow these steps to create a recruit type code.

1. Access the Recruit Type Validation Form (STVRTYP).
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 **Activity Date** field empty.

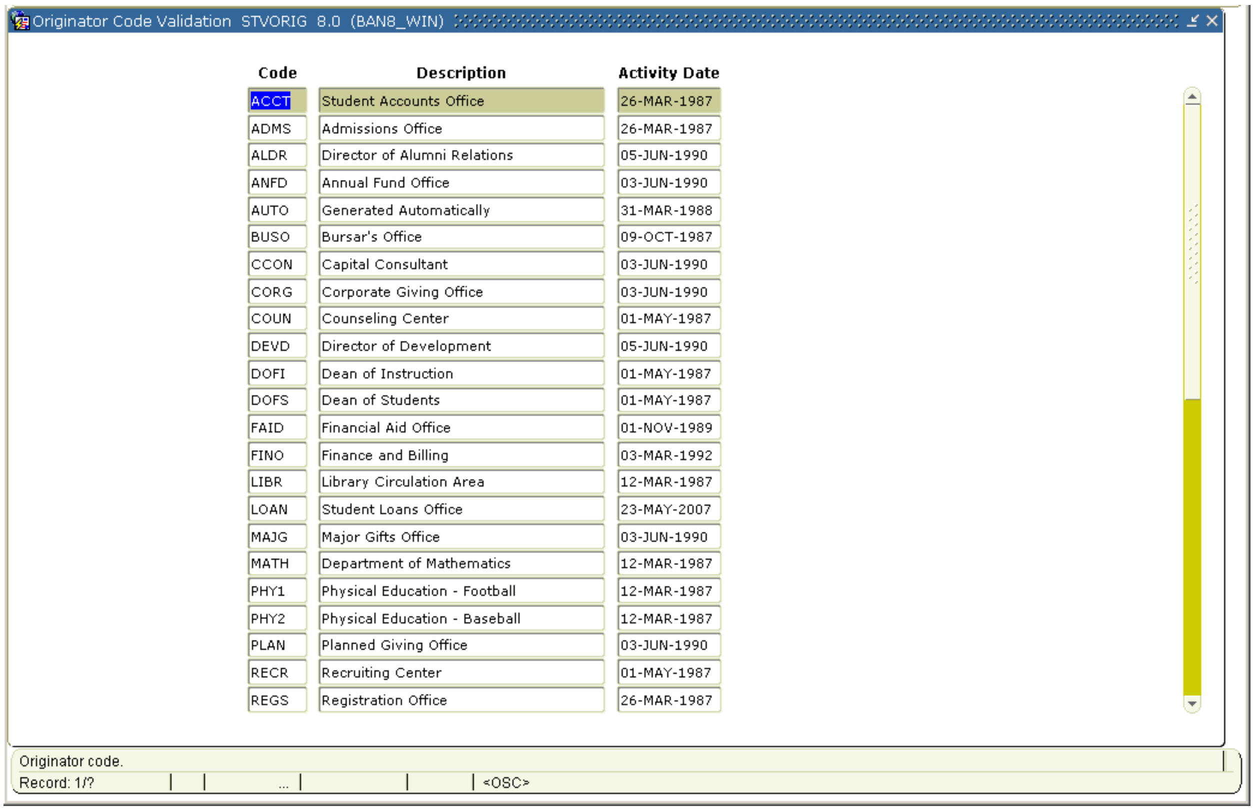
   Note: The field auto-populates with the current date when you save.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Originator Code Validation

Purpose

The Originator Code Validation Form (STVORIG)

Banner form



Originator Code Validation STVORIG 8.0 (BAN8_WIN)

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
AUTO	Generated Automatically	31-MAR-1988
BUSO	Bursar's Office	09-OCT-1987
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
FAID	Financial Aid Office	01-NOV-1989
FINO	Finance and Billing	03-MAR-1992
LIBR	Library Circulation Area	12-MAR-1987
LOAN	Student Loans Office	23-MAY-2007
MAJG	Major Gifts Office	03-JUN-1990
MATH	Department of Mathematics	12-MAR-1987
PHY1	Physical Education - Football	12-MAR-1987
PHY2	Physical Education - Baseball	12-MAR-1987
PLAN	Planned Giving Office	03-JUN-1990
RECR	Recruiting Center	01-MAY-1987
REGS	Registration Office	26-MAR-1987

Originator code.
Record: 1/? ... <OSC>

Steps

Follow these steps to create an originator code.

1. Access the Originator Code Validation Form (STVORIG).
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 **Activity Date** field empty.

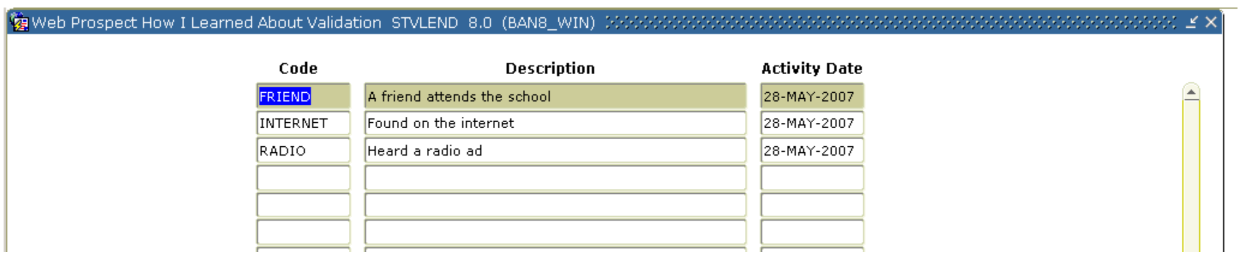
   Note: The field auto-populates with the current date when you save.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Web Prospect How I Learned About Validation

Purpose

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

Banner form


Web Prospect How I Learned About Validation STVLEND 8.0 (BAN8_WIN)

Code	Description	Activity Date
FRIEND	A friend attends the school	28-MAY-2007
INTERNET	Found on the internet	28-MAY-2007
RADIO	Heard a radio ad	28-MAY-2007

Steps

Follow these steps to create a web prospect how I learned about code.

1. Access the Web Prospect How I Learned About Validation Form (STVLEND).
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 **Activity Date** field empty.

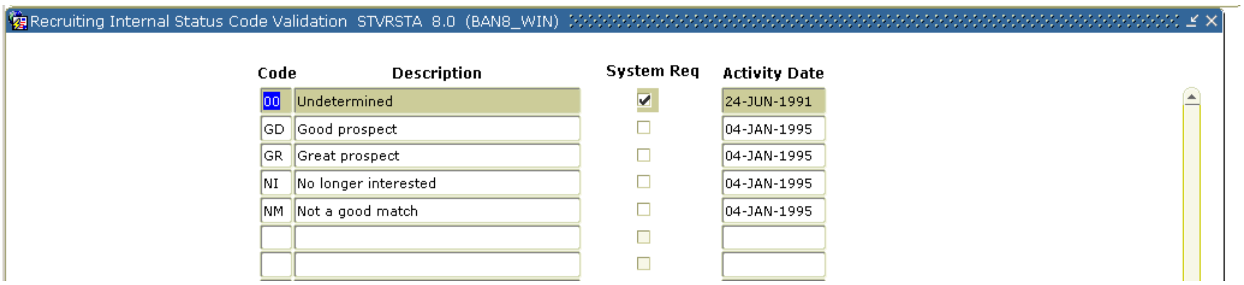
   Note: The field auto-populates with the current date when you save.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Recruiting Internal Status Code Validation

Purpose

The Recruiting Internal Status Code Validation Form (STVRSTA)

Banner form



Steps

Follow these steps to create a recruiting internal status code.

8. Access the Recruiting Internal Status Validation Form (STVRSTA).
9. Perform an **Insert Record** function.
10. Enter your initials in the **Code** field.
11. Enter your name in the **Description** field.
12. Leave the **System Req** checkbox empty.
13. Leave the **Activity Date** field empty.

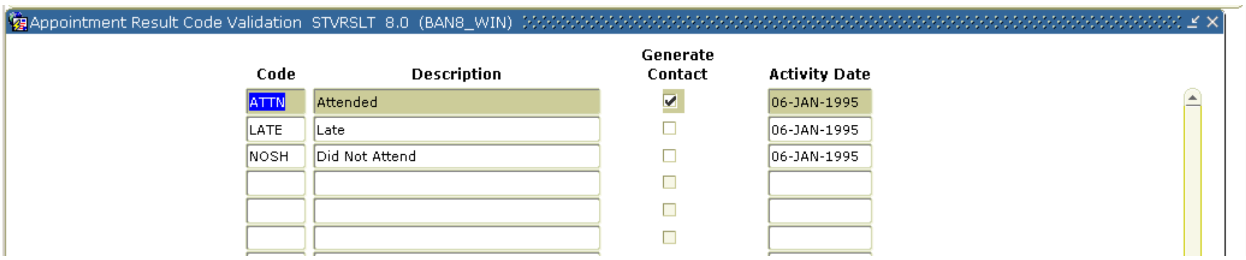
    Note: The field auto-populates with the current date when you save.
14. Click the **Save** icon.
15. Click the **Exit** icon.

Appointment Result Code Validation

Purpose

The Appointment Result Code Validation Form (STVRSLT)

Banner form



Steps

Follow these steps to create an appointment result code.

1. Access the Appointment Result Code Validation Form (STVRSLT).
2. Perform an **Insert Record** function.
3. Enter your initials in the **Code** field.
4. Enter your name in the **Description** field.
5. Click on the **Generate Contact** checkbox.
6. Leave the **Activity Date** field empty.

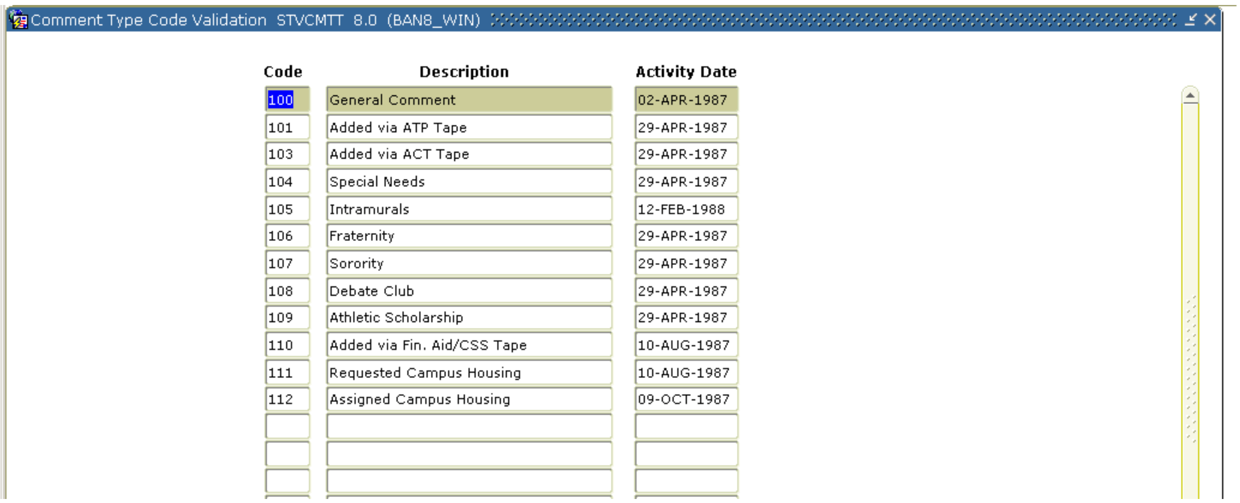
   Note: The field auto-populates with the current date when you save.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Comment Type Code Validation

Purpose

The Comment Type Code Validation Form (STVCMTT)

Banner form



Comment Type Code Validation STVCMTT 8.0 (BAN8_WIN)

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

Steps

Follow these steps to create a comment type code.

1. Access the Comment Type Code Validation Form (STVCMTT).
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 **Activity Date** field empty.

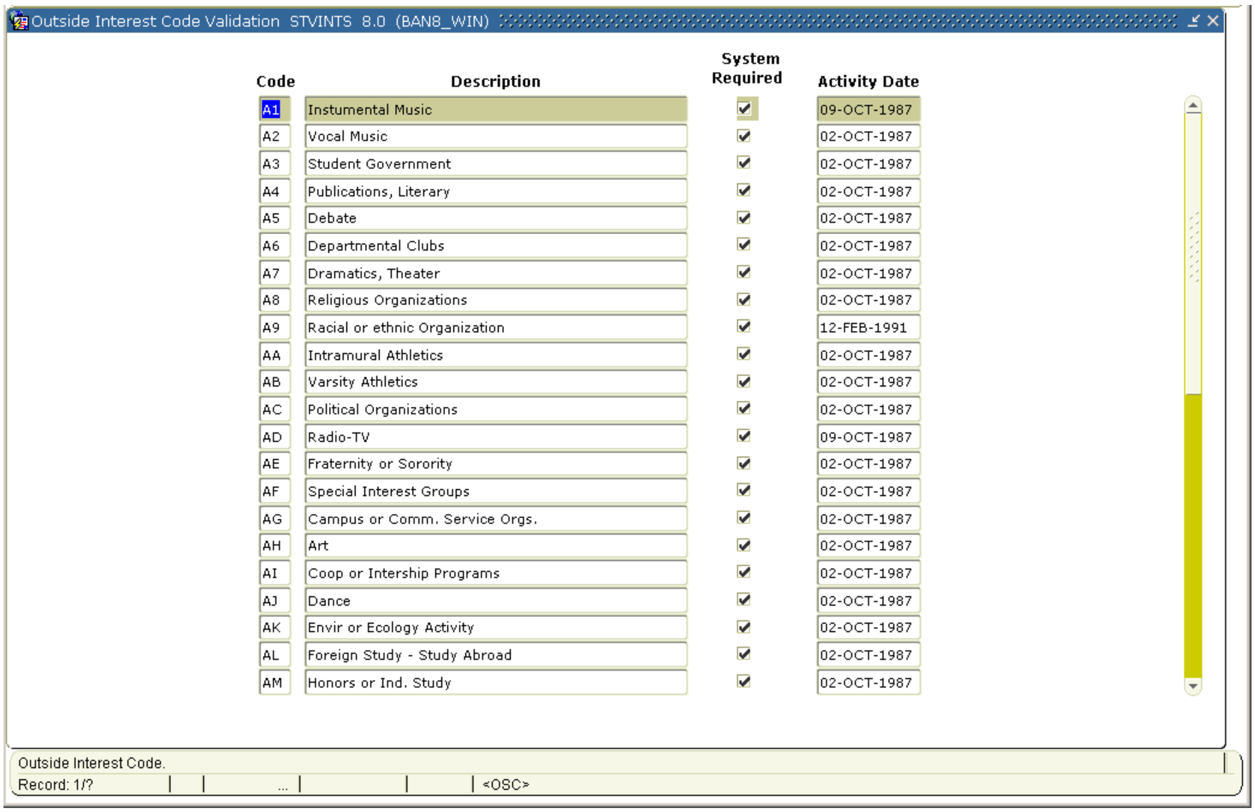
   Note: The field auto-populates with the current date when you save.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Outside Interest Code Validation

Purpose

The Outside Interest Code Validation Form (STVINTS)

Banner form



Outside Interest Code Validation STVINTS 8.0 (BAN8_WIN)

Code	Description	System Required	Activity Date
A1	Instumental Music	✓	09-OCT-1987
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

Outside Interest Code.
Record: 1/? | <OSC>

Steps

Follow these steps to create an outside interest code.

1. Access the Outside Interest Code Validation Form (STVINTS).

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.

   Note: The field auto-populates with the current date when you save.

7. Click the **Save** icon.

8. Click the **Exit** icon.

Setting Up Communication Plan Rules for Recruitment

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

Self Check

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?

Answer Key for Self Check

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**

Day-to-Day Operations

Section goal

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

Objectives

In this section you will learn how 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.

Process Introduction

About the process

Potential students can also enter their own request for information over the Web.

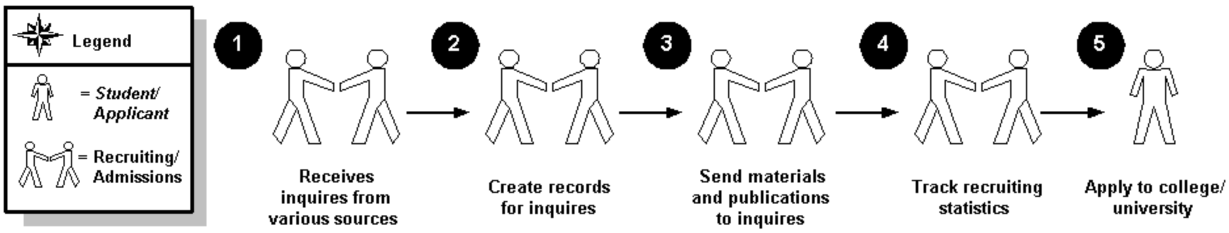
The Recruiting staff usually works in conjunction with the Admissions office.

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.

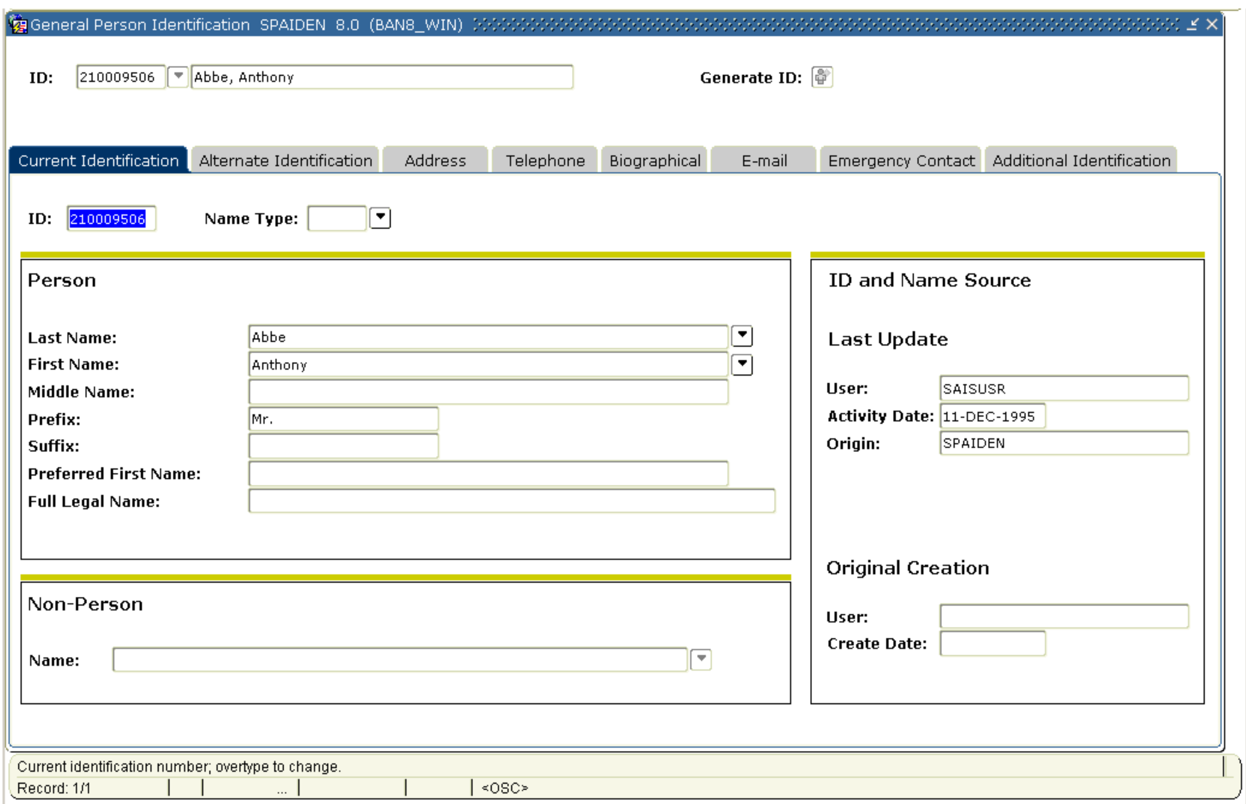
Capturing Biographic/Demographic Information

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



Steps

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.

1. Access the General Person Identification Form (SPAIDEN).

   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 **Last Name** field followed by %.
6. Click the **Execute Query** icon.
7. Make sure the prospect name you are creating does not already exist.
   - If the prospect already exists, select a new name and repeat the person search.
   - 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).

    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.*

18. Click **OK**.

19. Enter an address.

    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.

Using Common Matching when Capturing Prospect Information

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.

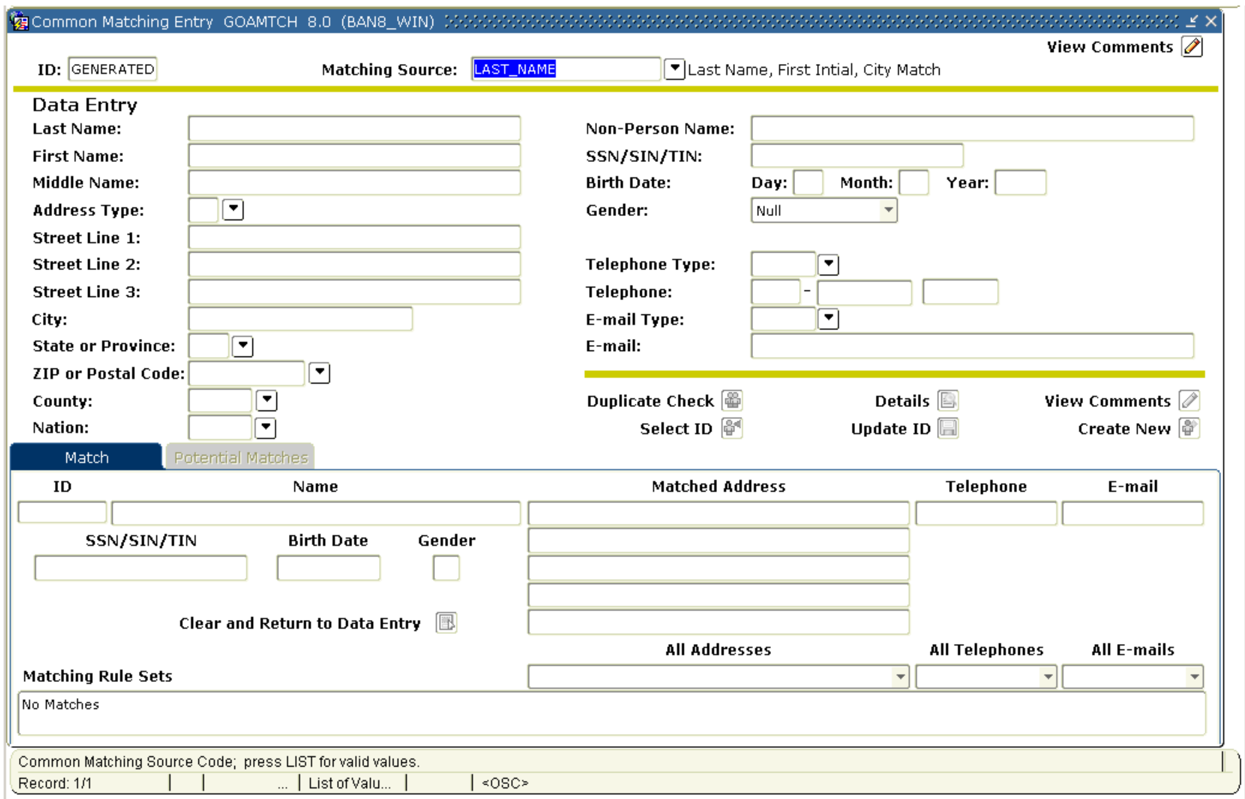
Match: If one and only one record matches the rules, a status of *Match* is returned and the **Match** tab will be highlighted. Data for the matched PIDM will be returned for review.

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.

Common Matching Entry Form (GOAMTCH)

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



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.

Steps

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.

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.

   Note: You can choose to select **GOAMTCH** from the **Options** menu at this point.
3. Perform a **Next Block** function.

   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.

   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.

   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.

8. Use the chart below to determine the next action.

IF the result is...	THEN follow these steps.
New	Click the **Create New** icon to create a new PIDM. Result: 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: • **Select ID** to select the record and carry it back to the key block of SPAIDEN. • **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. Click the **Details** button to view data about the potential match on other forms (defined on GORCMSC). Determine if person is new or a match and select the appropriate icon (**Create New** or **Select ID** or **Update ID**).

9. If the person is new, click **OK** to any prompts.

   Result: After completing the update or insert, you will be returned to the key block of SPAIDEN to continue your data entry.

   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.

    Note: You can click any of the available tabs on SPAIDEN (Address, Telephone, etc.) to enter any additional information on the person.

    Follow the remaining steps to enter address information.

11. Click the **Address** tab.

12. Click the down arrow next to the **Address Type** field to view the Option List.

13. Select *Permanent.*

14. Click **OK**.

15. Enter an address.

    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.

16. Click the **Save** icon.

17. Click the **Exit** icon.

Capturing Information on Prospective Applicants

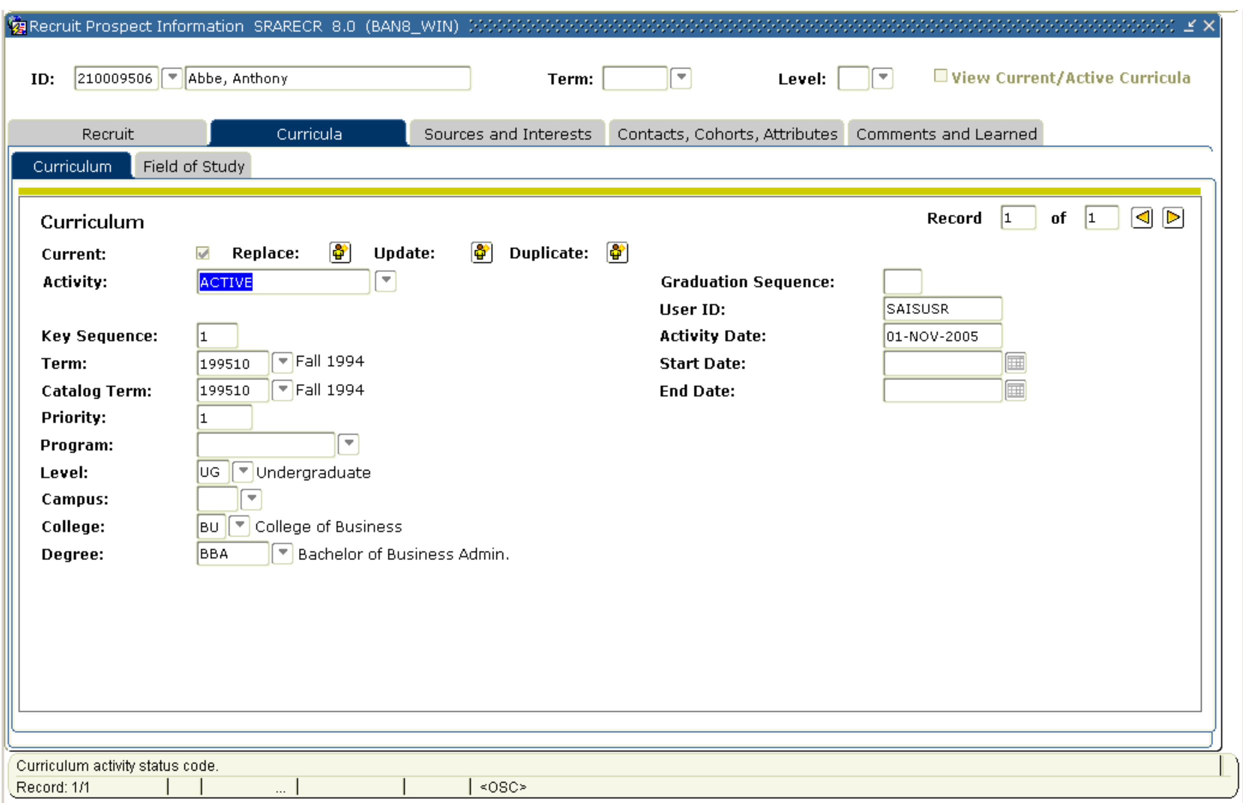
Purpose

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



Steps

Follow these steps to capture recruiting information.

1. Access the Recruit Prospect Information Form (SRARECR).
2. Has the **ID** field auto-populated with your new person?

   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).

   Note: 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.

   Note: 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.

    Result: 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 Curricula tab of the form.

    Result: You will be taken to the Curricula tab if no curricula data yet exists for the record being created. If a curriculum 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.

17. Complete these fields, if not already completed: **Priority**, **Type** (*Major*, *Minor* or *Concentration*), **Status** (if other than the default), and **Field of Study**.

    Warning: At least one row with Type = Major must exist. Without a major, you will not be able to save the record.

    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.

    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 %.

    Example: *ABC College%*

25. Click the **Execute Query** icon.

26. Double-click the **Type** field of the correct college.

    Result: This returns the value to the Source, Interests, Withdrawal window.

27. Select the **Primary Source** checkbox.

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

Entering Prospects Using the Quick Recruit Form

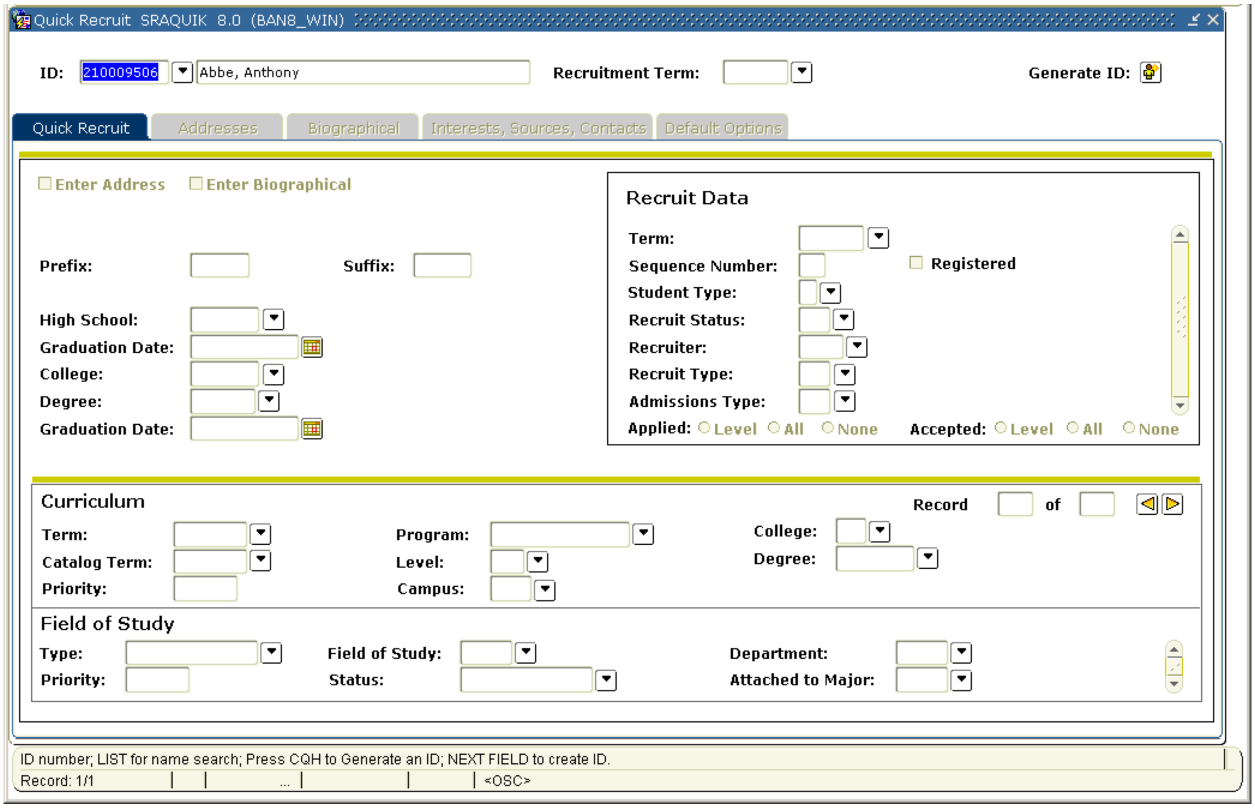
Purpose

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



Quick Recruit SRAQUIK 8.0 (BAN8_WIN)
ID: 210009506 Abbe, Anthony
Recruitment Term:
Generate ID:
Quick Recruit
Addresses
Biographical
Interests, Sources, Contacts
Default Options
Enter Address
Enter Biographical
Prefix:
Suffix:
High School:
Graduation Date:
College:
Degree:
Graduation Date:
Recruit Data
Term:
Sequence Number:
Registered
Student Type:
Recruit Status:
Recruiter:
Recruit Type:
Admissions Type:
Applied: Level All None
Accepted: Level All None
Curriculum
Record of
Term:
Catalog Term:
Priority:
Program:
Level:
Campus:
College:
Degree:
Field of Study
Type:
Priority:
Field of Study:
Status:
Department:
Attached to Major:
ID number; LIST for name search; Press CQH to Generate an ID; NEXT FIELD to create ID.
Record: 1/1
<OSC>

Steps

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.

1. Access the Quick Recruit Form (SRAQUIK).
2. Select **Default Options** 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.*

25. Click **OK**.

26. Click the **Rollback** icon.

    Result: This will take you back to the key block of the form.

27. Click the **Generate ID** button.

    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.

    Result: This will auto-populate the additional fields.

29. Click the **Save** icon.

30. Click the **Rollback** icon.

31. Enter the ID of your second prospect.

    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.

    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.

    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.

37. Click **OK** to any prompts to return to SRAQUIK and create the new record.

    Note: Refer to the topic *Using Common Matching When Capturing Prospect Information* for a complete list of steps for using common matching.

    Note: 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.

    Result: 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.

    Note: 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.

48. Select a gender.

49. Enter a date of birth in the **Birth Date** field.

50. Click the down arrow next to the **Ethnic** field.

51. Select an ethnicity.

52. Click **OK**.

53. Click the down arrow next to the **Legacy** field.

54. Select a legacy.

    Example: *aunt*, *uncle*, *brother*

55. Click **OK**.

56. Click in the **Graduation Date** field.

57. Enter a graduation date.

    Example: *06-JUN-2008*

58. Perform a **Next Block** function.

59. Click in the **Term** field in the Recruit Data section.

    Result: Fields on the remaining areas of the form will auto-populate.

60. Perform a **Next Block** function to access the Curriculum window.

61. Enter a program in the **Program** field.

    Result: Depending on the program entered, other fields may auto-populate.

62. Complete other fields if necessary.

    Examples: **Campus**, **Level**, etc.

63. Click the **Save** icon.

    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).

64. 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.

65. Click the **Interests, Sources, Contacts** tab.

66. Enter an interest in the **Interest** field.

67. Click the **Save** icon.

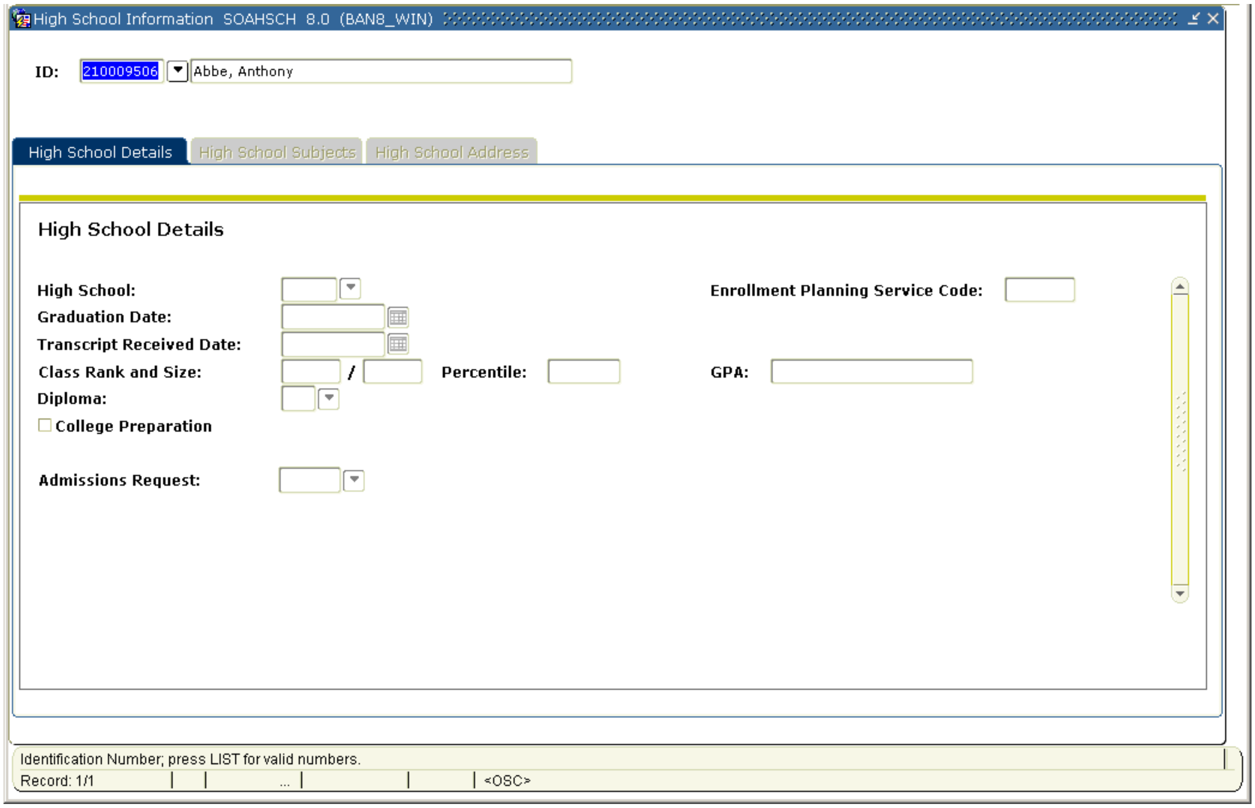
68. Click the **Exit** icon.

Entering High School Information for Prospects

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



Steps

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

Warning: Do not interchange the prospect records in this exercise.

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.

   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).
3. Enter the last name of the prospect created previously followed by a percent sign.

   Example: *Smith%*
4. 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.
5. Perform a **Next Block** function to access the main body of the form.
6. Enter the high school code [*Your Initials*]2 from a previous exercise in the **High School** field,
7. Click the **High School Address** tab.
8. Verify the address information.
9. Click back to the **High School Details** tab.
10. Leave the **Enrollment Planning Service Code** field empty.
11. In the **Graduation Date** field, enter *May 15, 200X* in DD-MMM-YYYY format.

    Example: 15-MAY-2008.

12. Enter the *current date* in DD-MMM-YYYY format in the **Transcript Received Date** field.

    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.

13. Select the **College Preparation** checkbox.

14. Enter a rank and size in the **Class Rank and Size** field.

    Note: The **Percentile** field will automatically calculate, based on rank and size.

15. Enter a *GPA* in the **GPA** field.

    Note: HST1 will default in the **Admissions Request** field.

16. Click the down arrow next to the **Diploma** field to view the List of Values.

17. Select *College Preparatory.*

18. Click **OK**.

19. Click the **Save** icon.

20. Select High School Subjects from the **Options** menu or click the **High School Subjects** tab to access the High School Subjects window.

21. Click the down arrow below the **Subjects** field to view the List of Values.

22. Select *Mathematics.*

23. Click **OK**.

24. Indicate that the prospect has completed two years of Mathematics with grades of AABA and a GPA of 3.75.

    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.

25. Click the **Save** icon.

26. Click the **Rollback** icon to return to the High School Details window.

27. Enter the ID for the prospect and recruiting record 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 by tabbing to the **Name** field (adjacent to the **ID** field).

28. Enter the last name of the person created in a previous exercise followed by a percent sign.

    Example: *Smith*%

29. 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.

30. Perform a **Next Block** function.

    The **High School** information will default from the Quick Recruit Form.

31. Leave the **Enrollment Planning Service Code** field empty.

    Note: The **Graduation Date** field will default.

32. Enter the *current date* in DD-MON-YYYY format in the **Transcript Received Date** field.

33. Example: 01MAR2003

    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.

34. Select the **College Preparation** check box.

35. Enter a rank and size in the **Class Rank and Size** field.

    Note: The **Percentile** field will automatically calculate, based on rank and size.

36. Enter a *GPA* in the **GPA** field.

    Note: The high school code HST1 will default in the **Admissions Request** field.

37. Click the down arrow next to the **Diploma** field to view the List of Values.

38. Select *College Preparatory.*

39. Click **OK**.

40. Click the **Save** icon.

41. Select **High School Subjects** from the **Options** menu to access the High School Subjects window.

42. Click the down arrow next to the **Subjects** field to view the List of Values.

43. Select *French.*

44. Click **OK**.

45. Indicate that the prospect has completed two years of French with grades of BBCA and a GPA of 3.00.

46. Click the **Save** icon.

47. Click the **Exit** icon.

Entering Prior College Information

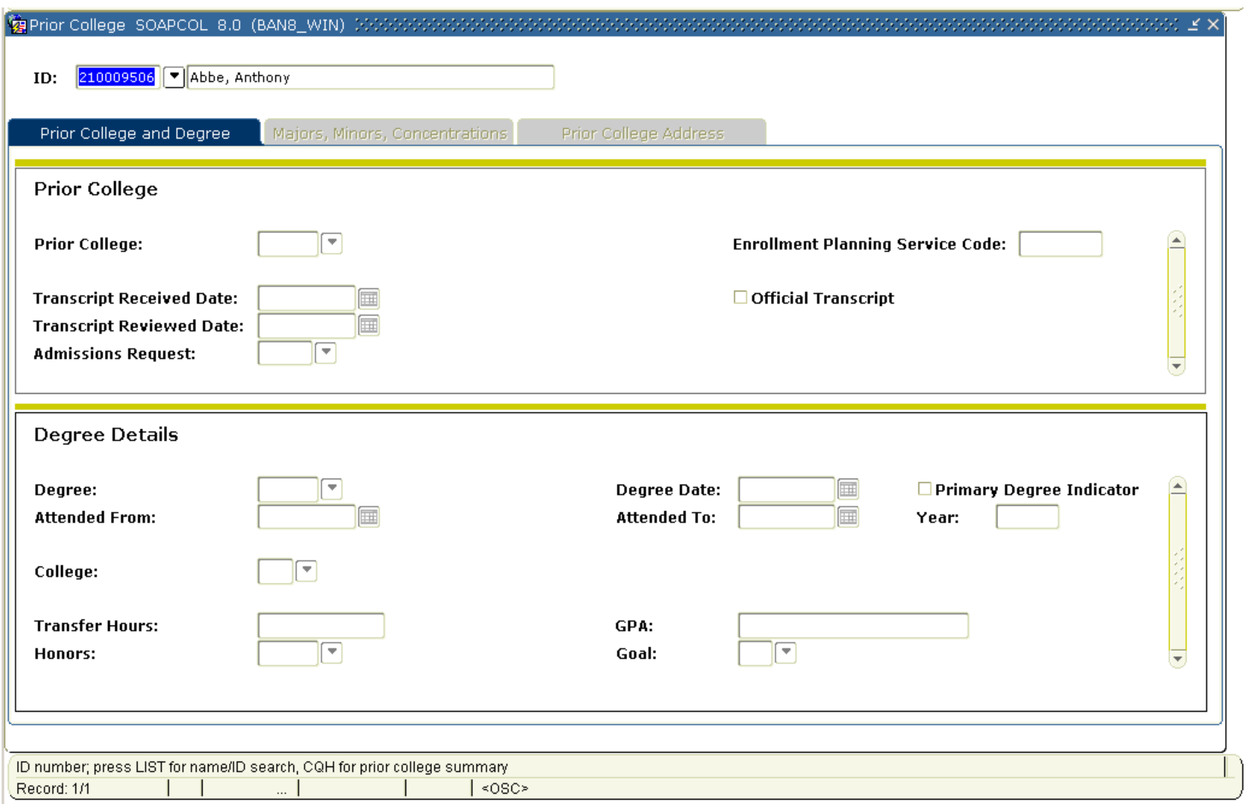
Purpose

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 8.0 (BAN8_WIN)

ID: 210009506 Abbe, Anthony

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

Prior College

Prior College:

Enrollment Planning Service Code:

Transcript Received Date:

Official Transcript

Transcript Reviewed Date:

Admissions Request:

Degree Details

Degree:

Degree Date:

Primary Degree Indicator

Attended From:

Attended To:

Year:

College:

Transfer Hours:

GPA:

Honors:

Goal:

ID number; press LIST for name/ID search, CQH for prior college summary

Record: 1/1 ... <OSC>

Steps

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.

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:

3. Leave the **ID** field empty.

4. Tab to the **Name** field (adjacent to the **ID** field).

5. Enter the last name prospect 1 created in Exercise 4.2.2 followed by a percent sign.

   Example: *Smith*%

6. 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.

7. Perform a **Next Block** function.

8. Enter the college code [*Your Initials*]1 created in a previous exercise in the **Prior College** field.

   Note: The **Admissions Request** field auto-populates when [Enter] is pressed or you select another field.

9. Enter the current date in DD-MMM-YYYY format in the **Transcript Received Date** field.

10. Example: 01-JUL-2003

    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.

11. Leave the **Transcript Reviewed Date** field empty.

12. Select the **Official Transcript** checkbox.

13. Click the **Save** icon.

14. Click the down arrow next to the **Degree** field to view the List of Values.

15. Select *Undeclared.*

16. Click **OK**.

17. Enter these dates in the **Attended From** and **Attended To** fields.

    Example: 01-SEP-2002 15-MAY-2003

    Note: The prospect attended the other institution from September 1, 2002 to May 15, 2003.

18. Click the **Save** icon.

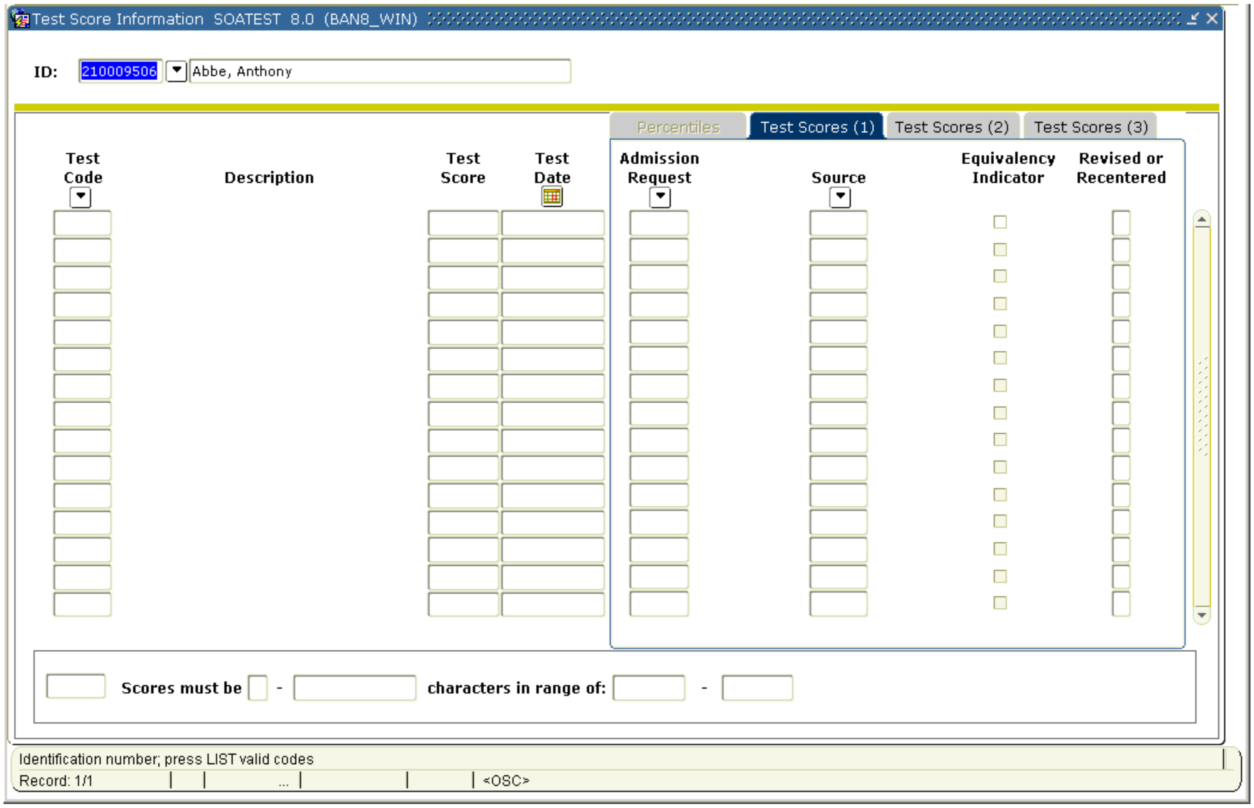
19. Click the **Exit** icon.

Entering Tests and Test Scores

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



Steps

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.

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*.

   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**.

    Result: The **Admission Request** field defaults to TSTS.

    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.*
16. Click **OK**.
17. Click the **Save** icon.

18. Use the down arrow on your keyboard to move to the next record/line.

19. Click the down arrow below the **Test Code** field to view the List of Values.

20. Select *SAT Mathematics.*

21. Click **OK**.

22. Enter a score in the **Test Score** field within the range indicated.

23. Enter *May 1, 2003* in the **Test Date** field.

24. Select the Test Scores (2) tab.

25. Click the down arrow above the **Administration Type** field to view the List of Values.

26. Select *National*.

27. Click **OK**.

28. Result: The **Request** field defaults to *TSTS*.

29. Select the **Test Scores (1)** tab.

30. Click the down arrow below the **Source** field to view the List of Values.

31. Select *College transcript.*

32. Click **OK**.

33. Click the **Save** icon.

34. Click the **Rollback** icon.

35. 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.

36. Perform a **Next Block** function.

37. Click the down arrow below the **Test Code** field to view the List of Values.

38. Select *SAT Verbal.*

39. Click **OK**.

40. Enter a score within the range indicated in the **Test Score** field.

41. Enter *August 12, 2002* in the **Test Date** field.

    Example: 12-AUG-2002

42. Select the **Test Scores (2)** tab.
43. Click the down arrow below the **Administration Type** field to view the List of Values.
44. Select *National.*
45. Click **OK**.

    Result: The **Request** field defaults to *TSTS*.

46. Select the **Test Scores (1)** tab.
47. Click the down arrow next to the **Source** field to view the List of Values.
48. Select *H.S. transcript.*
49. Click **OK**.
50. Click the **Save** icon.
51. Use the down arrow on your keyboard to move to the next record/line.
52. Click the down arrow below the **Test Code** field to view the List of Values.
53. Select *SAT Mathematics.*
54. Click **OK**.
55. Enter a score within the range indicated in the **Test Score** field.
56. Enter *August 12, 2002* in the **Test Date** field.

    Example: 12-AUG-2002

57. Select the **Test Scores (2)** tab.
58. Click the down arrow below the **Administration Type** field to view the List of Values.
59. Select *National.*
60. Click **OK**.

    Result: The **Request** field defaults to *TSTS*.

61. Select the **Test Scores (1)** tab.

62. Click the down arrow below the **Source** field to view the List of Values.

63. Select *H.S. transcript.*

64. Click **OK**.

65. Click the **Save** icon.

66. Click the **Exit** icon.

Entering Recruiter Appointments

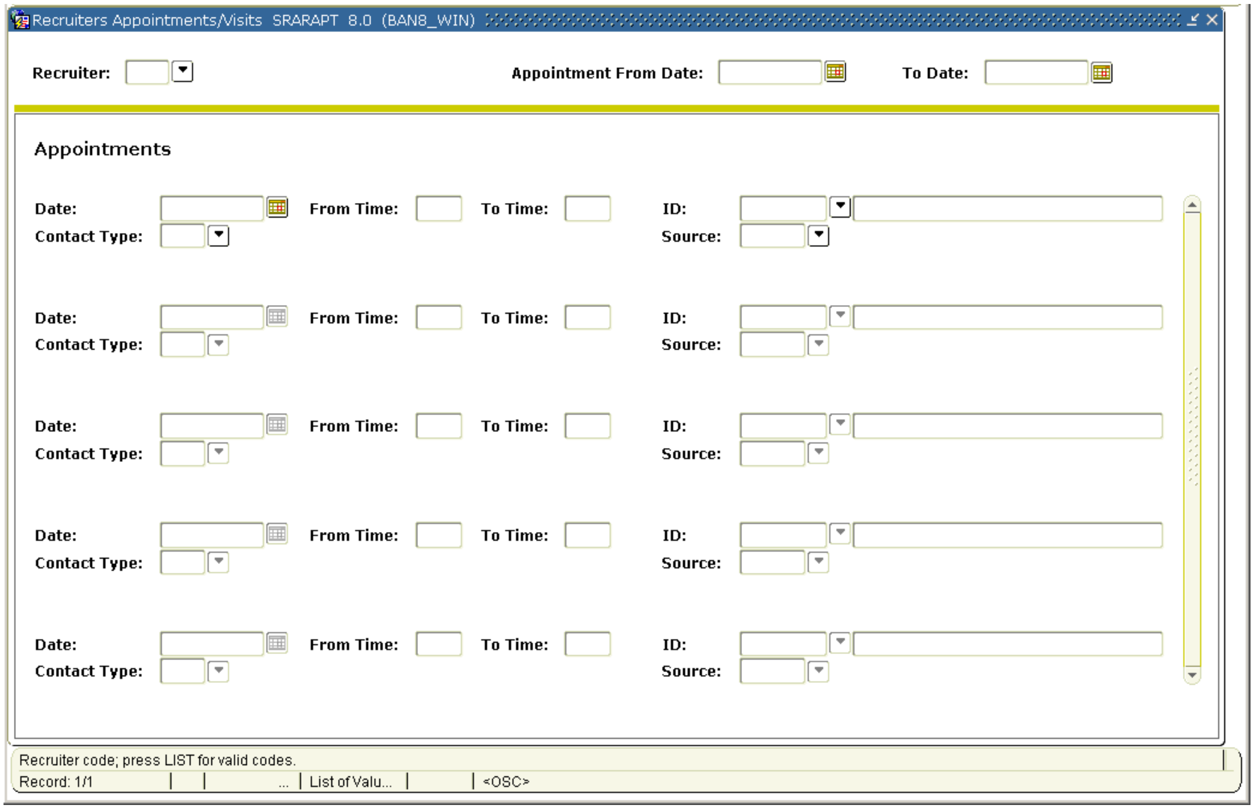
Purpose

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.

Note: 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



Exercise

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

Steps

Follow these steps to complete the process.

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.

   Note: 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.

   Note: 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.

   Note: 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.

   Warning: 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.

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.

9. Leave the **ID** field empty. Tab to the **Name** field (adjacent to the **ID** field).

10. Enter the last name prospect 2 followed by a percent sign.

    Example: *Smith%*

11. 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.

12. Click the down arrow next to the **Contact Type** field to view the List of Values.

13. Select *Interview One*.

14. Click **OK**.

15. Leave the **Source** field empty.

16. Click the **Save** icon.

17. Click the **Exit** icon.

Recruitment Reports

Available reports

The following Banner Reports are used in the Recruitment module.

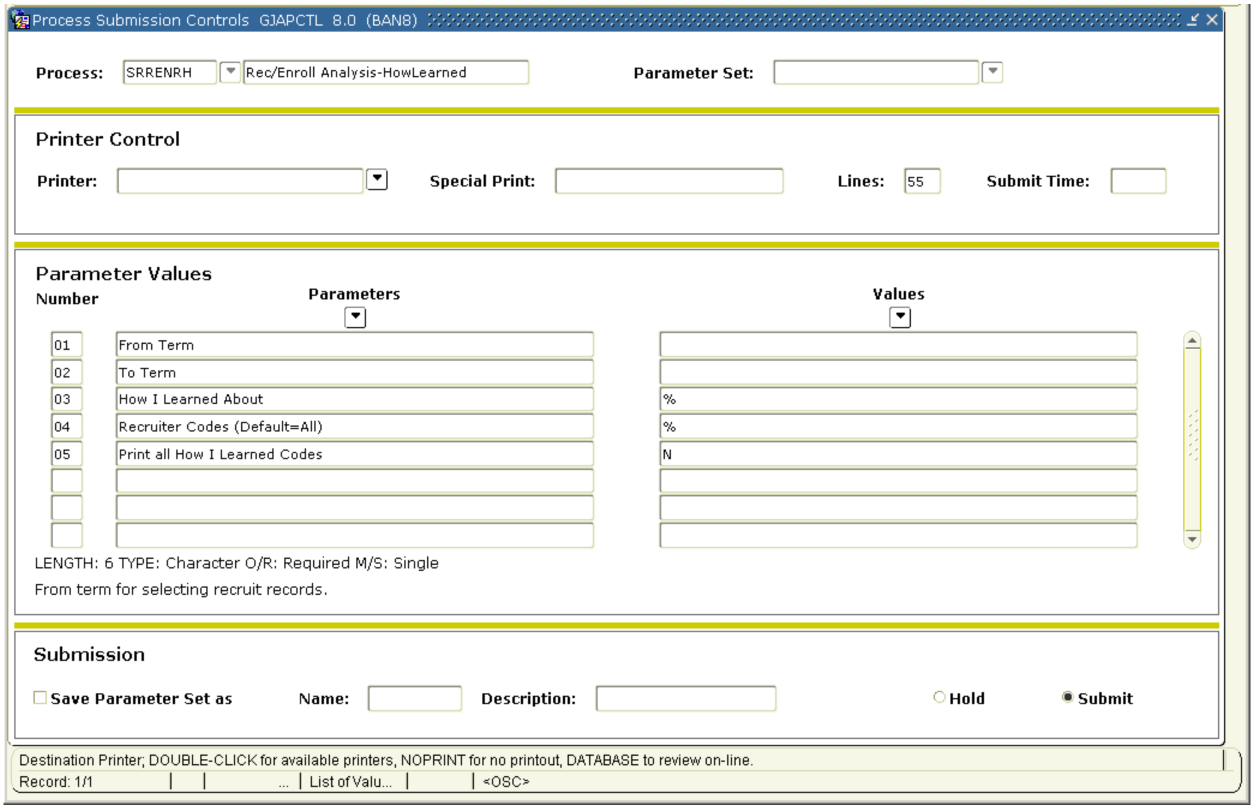
Report Description	**Banner Name**
Rec/Enroll Analysis - How Learned Report	SRRENRH
Recr/Enrl Analysis - Source/Recr Report	SRRENRL
Recruits Never Applied to Inst. Report	SRRINQR
Communication Plan Processing Report	SORCPLN

Using the Rec/Enroll Analysis - How Learned Report

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 form



Steps

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

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.

   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

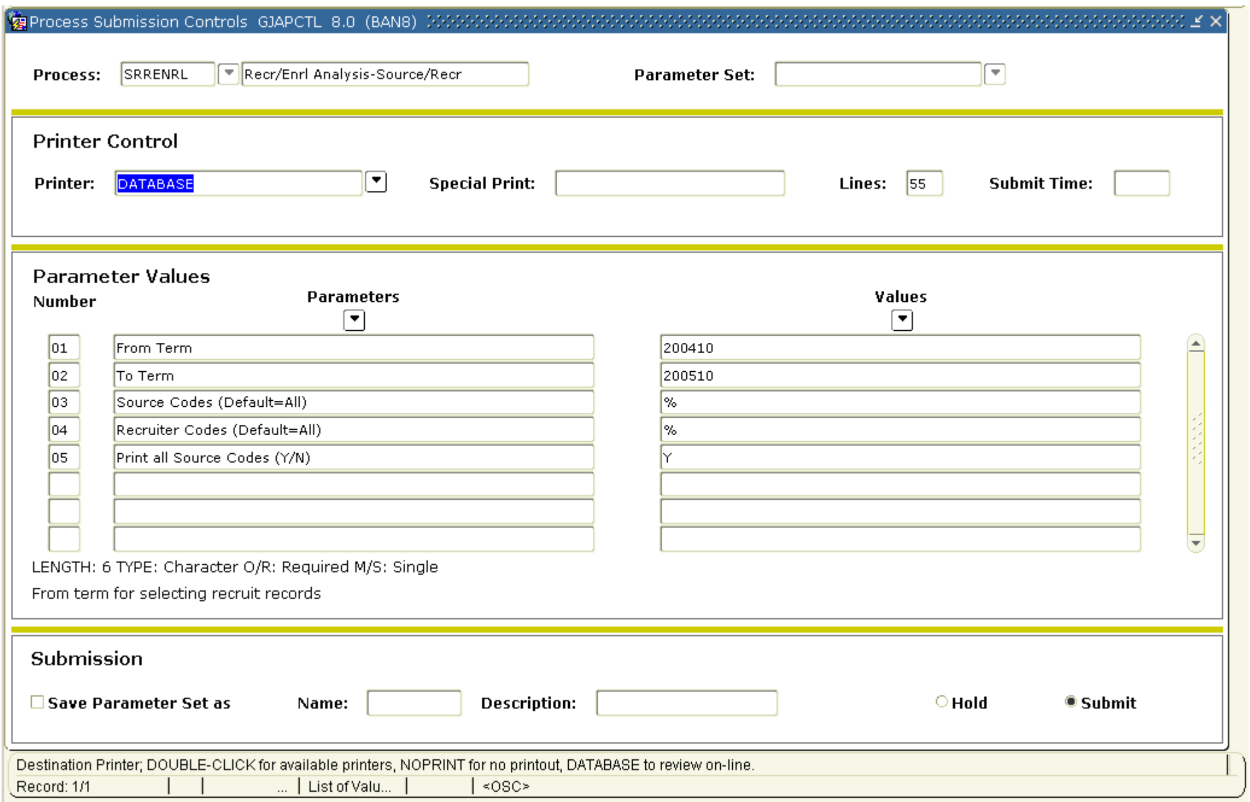
6. Perform a **Next Block** function.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Using the Recr/Enrl Analysis - Source/Recr Report

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



Steps

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

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.

   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.

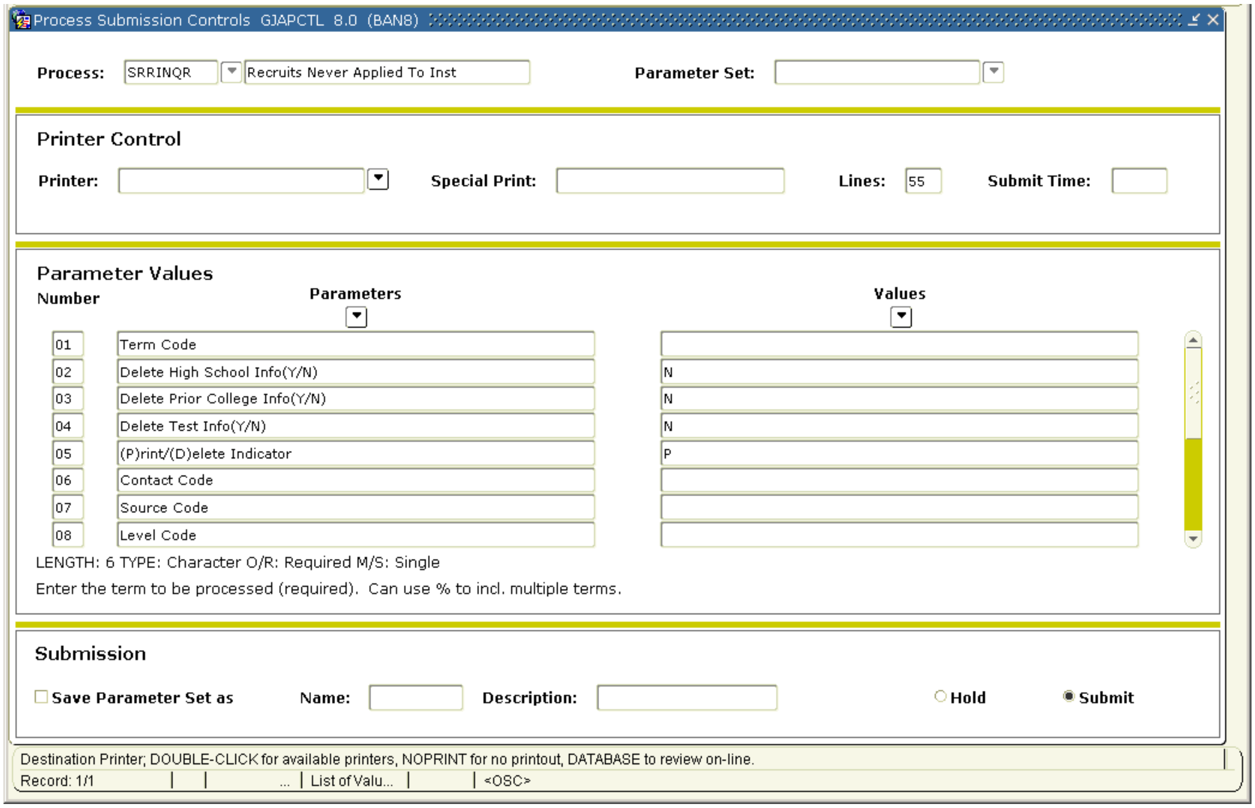
Using the Recruits Never Applied to Inst. Report

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 form


Process Submission Controls GJAPCTL 8.0 (BAN8)
Process: SRRINQR
Recruits Never Applied To Inst
Parameter Set:
Printer Control
Printer:
Special Print:
Lines: 55
Submit Time:
Parameter Values
Number
Parameters
Values
01 Term Code
02 Delete High School Info(Y/N) N
03 Delete Prior College Info(Y/N) N
04 Delete Test Info(Y/N) N
05 (P)rint/(D)elete Indicator P
06 Contact Code
07 Source Code
08 Level Code
LENGTH: 6 TYPE: Character O/R: Required M/S: Single
Enter the term to be processed (required). Can use % to incl. multiple terms.
Submission
Save Parameter Set as
Name:
Description:
Hold
Submit
Destination Printer; DOUBLE-CLICK for available printers, NOPRINT for no printout, DATABASE to review on-line.
Record: 1/1
List of Valu...
<OSC>

Steps

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

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.

   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

Parameter	Description	Req?
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

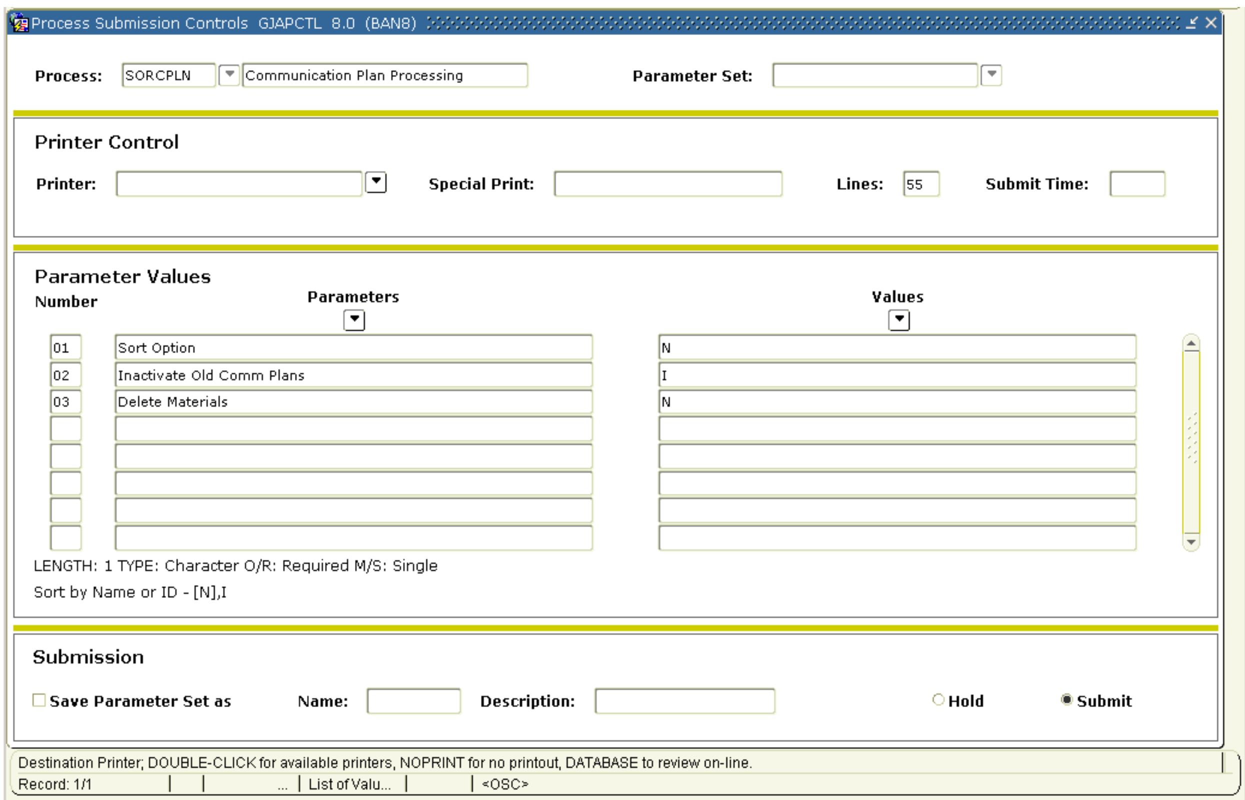
6. Perform a **Next Block** function.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Using the Communication Plan Processing Report

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 form



Steps

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

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.

   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.

Summary

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.

Self Check

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

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?

Answer Key for Self Check

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

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)

Appendix

Section goal

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

Forms Job Aid

Form	Full Name	Use this Form to...
SPAIDEN	General Person Identification	create and maintain biographic/demographic information for all persons associated with the institution. Information does not relate to the person's involvement at the institution.
SPAPERS	General Person	cnter and maintain biographical and demographic information about an individual identified in SPAIDEN.
STVSBGI	Source/Background Institution Code Validation Form	create, update, insert and delete source/background institution codes.
SOASBGI	Source/Background Institution Base	capture general information, such as address, comments and/or contacts, about a source or background institution.
SOABGIY	Source/Background Institution Year	capture yearly information about a source or background institution. SOASBGI must be established prior to using this form.
SOABGTA	Transfer Articulation Institution	describe additional, user-defined high school information, such as schools that do not provide a class rank, or schools in which a high percentage of students attain high SAT or ACT scores.
STVTERM	Term Code Validation	create, update and delete term codes, such as 200920 Spring 2009 of 0809 Aid Year or 200810 Fall 2007 of 0708 Aid Year.
STVMAJR	Major, Minor, Concentration Code Validation	create, update and delete Major, Minor and Concentration codes, such as History, Journalism or Music.
STVLEVL	Level Code Validation	create and maintain Level codes, such as Undeclared, Non-credit or Graduate.
STVCAMP	Campus Code Validation	create and maintain Campus codes, such as All, Main or Study Abroad.
STVDEGC	Degree Code Validation	maintain the Degree codes, such as Undeclared, Bachelor of Arts or Doctor of Education.

Form	Full Name	Use this Form to...
STVDEPT	Department Code Validation	maintain Department codes, such as History Department, Counseling Department or Department of Undeclared.
STVCOLL	College Code Validation	create, update, insert and delete College codes, such as College of Engineering, College of Law or College of Music.
STVSTYP	Student Type Code Validation	create, update, insert and delete Student Type codes, such as First Year Freshman, Dual Degree or Transfer.
STVADMT	Admission Type Code Validation	create, update, insert and delete Admission Type codes, such as Early Admission, Non credit, Undergraduate or Military.
STVWRSN	Withdrawal Reason Code Validation	create, update, insert and delete Withdrawal Reason Codes, such as Academic Failure, Health, Financial or Relocating.
STVAPDC	Admission Application Decision Code Validation	define and maintain the rules for display and processing for each application status code.
STVAPST	Admission Application Status Code Validation	create, update, insert and delete Admission Application Decision codes, such as Audited but Incomplete, Complete Ready for Review, Decision Made or Withdrawn.
STVEPSC	Enrollment Planning Service Code Validation	create, update, insert and delete Enrollment Planning Service codes for areas, such as Tarrant County, Pennsylvania, National Merit Territory or South Bend.
STVGEOR	Geographic Region Code Validation	create, update, insert and delete Geographic Region codes, such as New York Area Alumni Club, Central or Dallas Area.
STVGEOD	Geographic Region Division Code Validation	create, update, insert and delete Geographic Region Division codes such as Continuing Education Division, Financial Aid Office, Online or West.
STVATTS	Student Attribute Validation	create, update, insert and delete Student Attribute codes, such as Top 10% of Class, Veteran or GED Diploma.
STVCHRT	Cohort Code Validation	create, update, insert and delete Cohort codes, such as EOPS Student 0708, Athletes, or 1996 New Freshmen.
SOACURR	Curriculum Rules	view or create curricula.

Form	Full Name	Use this Form to...
SOACTRL	Curriculum Rules Control	determine whether or how various areas related to curriculum are used and to set the severity level of error checking by module if using curriculum rules.
STVRESD	Residence Code Validation	maintain codes for residency, such as Foreign, Out-of-State Resident or In-State Resident.
STVSITE	Site Code Validation	maintain information for sites, including site names and addresses.
STVSESS	Session Code Validation	create, update, insert and delete Session codes, such as Afternoon & Evening, Self Paced, Weekend or Day.
STVEDLV	Education Level Code Validation	create, update, insert and delete Education Level codes, such as Completed 4 Year Degree, 7th Grade or Completed High School.
STVEGOL	Education Goal Validation	create, update, insert and delete Education Goal codes, such as Obtain Associates Degree, GED Preparation, Job Advancement or Obtain Bachelor's Degree.
STVADMR	Admission Request Checklist Code Validation	create, update, insert and delete Admission Request Checklist codes, such as $100 Application Fee, Admissions Referral Form, Essay or Official High School Transcript.
STVDPLM	Diploma Type Validation	create, update, insert and delete Diploma type codes, such as College Preparatory, General Ed or Occupational.
STVSBJC	High School Subject Validation	create, update, insert and delete Subject codes such as Algebra 2, Latin or Physical Science.
STVHONR	Institutional Honors Code Validation	create, update, insert and delete Faculty Degree Institutional Honor codes, such as Cum Laude, Magna Cum Laude or Summa Cum Laude.
STVTESC	Test Code Validation	create, update, insert and delete Test codes, such as ACT English, SAT II Am Hist/Social Studies, or Reading Skills.

Form	Full Name	Use this Form to...
STVEPRT	Enrollment Verification Type Code Validation	create, update, insert and delete Enrollment Verification type codes, such as Official, Internal or Issued to Insurance Company.
STVTEFR	Test Form Validation	create, update, insert and delete Test Form codes, such as Standard Form or Form with Accommodation for Deaf Interpreter.
STVTEAC	Test Accommodation Validation	create, update, insert and delete Test Accommodation codes, such as Extended Time Allowed, Assistance by Translator or Full Accommodation.
STVTEIN	Test Instrument Validation	create, update, insert and delete Test Instrument codes, such as Standard Test or Oral Test.
STVCMTT	Comment Type Code Validation	create, update and delete comment type codes such as General Comment, Special Needs, Fraternity or Athletic Scholarship.
STVORIG	Originator Code Validation	create, update and delete originator codes, such as Student Accounts Office, Counseling Center or Recruiting Center.
STVPTYP	Source Contact Person Type Code Validation	create, update, insert and delete Source Contact Person Type codes, such as Principal, Coach or Counselor.
SMAPRLE	Program Definition Rules	create program codes.
STVCTYP	Contact Type Code Validation	create, update and delete the contact type codes, such as Campus Visit, College Night or Merit List Letter.
STVATYP	Address Type Code Validation	create, update and delete the address type codes, such as Billing, Business or Permanent.
STVRECR	Recruiter Code Validation	create, update, insert and delete recruiter codes, such as East Coast Recruiter, Central Recruiter, or High School Recruiter.
STVRTYP	Recruit Type Validation	create, update and delete recruit type codes, such as Class of ’95, Former or New.

Form	Full Name	Use this Form to...
STVORIG	Originator Code Validation	create, update and delete originator codes, such as Student Accounts Office, Counseling Center or Recruiting Center.
STVLEND	Web Prospect How I Learned About Validation	create, update and delete "How I Learned About" codes, such as A Friend Attends the School, Found on the Internet, or Heard a Radio Ad.
STVRSTA	Recruiting Internal Status Code Validation	create, update and delete recruiting internal status codes, such as Undetermined, Good Prospect or Not a Good Match.
STVRSLT	Appointment Result Code Validation	create, update and delete appointment result codes such as Attended, Late or Did Not Attend.
STVCMTT	Comment Type Code Validation	create, update and delete comment type codes such as General Comment, Special Needs, Fraternity or Athletic Scholarship.
STVINTS	Outside Interest Code Validation	create, update and delete Outside Interest codes such as Instrumental Music, Religious Organzations or Art.
GTVLETR	Letter Code Validation	define and maintain codes to identify letters that can be generated in Banner, such as Admissions Checklist, Financial Aid Interest or Admissions Application Acknowledgement.
GTVEMAL	Email Address Type Validation	create, update, insert and delete Email Address type codes, such as Business Email, Home Email, Campus Email or Preferred Email.
GUALETR	Letter Process	build a letter by combining paragraphs that have been defined on GUAPARA.
GUAPARA	Paragraph Process	build a paragraph that can be inserted into letters created by GUALETR. May contain text, variables and formatting commands.
SUAMAIL	Student Mail	create and maintains description of mail sent/communicated to a student.
SOAMATL	Material	create and maintains description of material that may be sent/communicated to a student.

Form	Full Name	Use this Form to...
SOAPLAN	Communication Plan Assignment	track Communication Plans and who is assigned to follow them.
SOACCOL	Communication Plan Collector	list all of the communication plans in the system.
SOACGRP	Communication Group	create, view and maintain a grouping of like communications, such as Athletic Department brochures, letters and mailing labels.
SOACPLN	Communication Plan	create, view and maintain steps/items in a particular communication plan, such as the Admissions Application Plan.
SOACOMM	Communication Rules	create, view and maintain rules for Communication Plans, including level, campus, college, degree, program, field of study, curricula, and which group is communicating.
SOADPMR	Duplicate Material Rules	create, view and maintain rules on distributing duplicate materials to students, including time interval, concurrence and override capability.
SOAELTL	HTML Letter Rules	create, view and maintain codes that construct letters that can be generated via the HTML processor for e-mail.
SOAELTR	Format HTML Letter Rules	create, view and maintain formatting and structure rules for letters or other correspondence sent via e-mail.
SPAIDEN	General Person Identification	create and maintain biographic/demographic information for all persons associated with the institution. Information does not relate to the person's involvement at the institution.
GOAMTCH	Common Matching Entry Form	determine whether an entity (person or non person) matches an existing record before it is entered into the database.
SRARECR	Recruit Prospect Information	captures and validates information on prospective applicants, including sources, intended degrees and majors, outside interests, and contacts, cohorts and attributes.
SRAQUIK	Quick Recruit	quickly enter a group of prospects that have common characteristics.

Form	Full Name	Use this Form to…
SOAHSCH	High School Information	enter information about a person's high school career, including high school, transcript dates, graduation date, GPA & subjects taken in high school.
SOAPCOL	Prior College	enter information about a person's prior college experience. Person must exist in SPAIDEN first.
SOATEST	Test Score Information	record and maintain test score information, including SAT, GRE, GMAT and AMCAS tests. May load from tape or enter manually.
SRARAPT	Recruiter Appointments/Visits	schedule and record daily appointments on campus and visits to other sources. Recruits with appointments must first be entered on SRARECR.
SRRENRH	Rec/Enroll Analysis – How Learned Report	produce a statistical report of recruits, applicants and enrollees by a How I Learned code for a term range.
SRRENRL	Recr/Enrl Analysis – Source/Recr Report	produce a statistical report of recruits, applicants, and enrollees by source and recruiter for a term range.
SRRINQR	Recruits Never Applied to Inst. Report	produce a list of recruits who have no admission records for a term or range of terms, filtered on a variety of criteria.
SORCPLN	Communication Plan Processing Report	show a person's movement from an old communication plan to a new communication plan. May inactivate or delete old plans, and old materials may be deleted or saved.

Terminology

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