

Banner Student Selective Admissions Training Workbook

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Think before you print.

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Introduction



Course goal

The goal of this workbook is to provide you with the knowledge and practice to accurately set up and run the various Selective Admission processes.

The workbook is divided into these units:

- Communication Load
- Secondary School Tracking
- Admissions Rating/Administrator Roles
- Regionalization

Note: Tape Load Processing is covered in a separate workbook.

Course objectives

In this course you will learn how to

- identify and describe all Banner forms and processes that will be affected by the communication load and removal processes, the secondary school tracking views and reports, the admissions rating and batch entry processes and/or the regionalization process
- create the rules and set parameters used to run the communication load and removal processes, the secondary school tracking processes, admissions rating and batch entry processes and/or the regionalization data processes.

- Operate the Communication Load and Removal processes
 - create the rules and set parameters used to process the communication load data
 - run the Communication Load process
 - run the Communication Removal process.

- Operate the Secondary School Tracking processes
 - view high school and prior college statistical information
 - run enrollment summary counts and rate reports based on high school and prior college data

- Operate the Admissions Rating/Administrator Roles processes
 - assign rating codes
 - enter multiple ratings per ID
 - group applications and enter decisions
 - review rating types and ratings for an ID
 - view all applications for a specific date.
 - assign a student to an administrator
 - display administrative roles

- Operate the Regionalization processes
 - assign geographic regions to an ID
 - assign administrators to recruit and applicant records
 - assign regions to individuals and to high schools

Intended audience

Admissions, and/or Recruiting Office Staff

Prerequisites

To complete this course, you should have

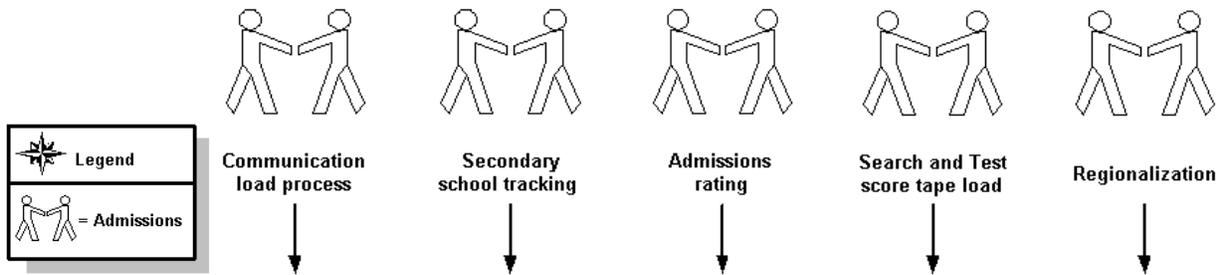
- completed the Education Practices computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system
- administrative rights to create and perform the necessary set up in Banner, such as the rules and validation codes in Banner needed for the Student Selective Admissions module
- completed the General Person Training Workbook
- completed the Recruiting and/or Admissions training workbooks.

Process Introduction

About the process

This course is intended to teach the participant about the Selective Admissions module, which facilitates the submission of reports and processes throughout Banner.

Flow diagram



Communication Load Introduction

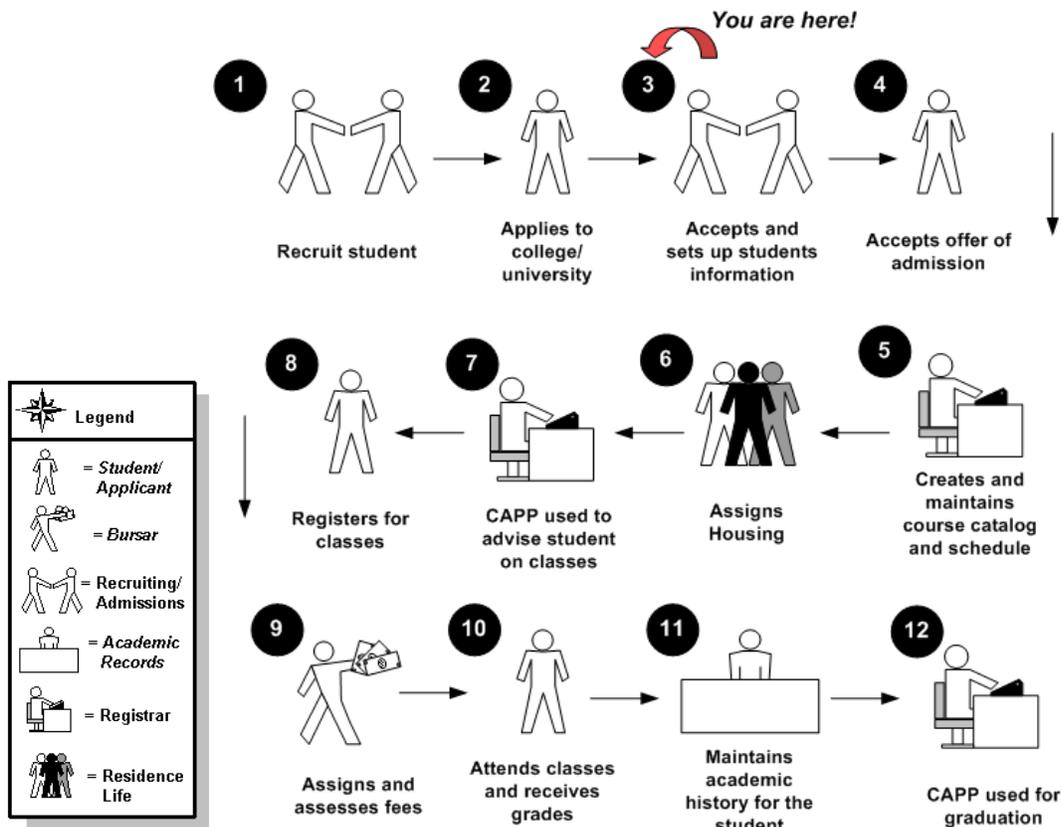


Section goal

The Admissions and/or Recruiting offices will utilize the Communication Load process for tracking in Banner various mailings sent to prospective students that take place outside the realm of Banner's communication plan processing and/or letter generation.

Flow diagram

This diagram highlights where the Communication Load and/or Removal process occurs within the overall Student process.



About the process

- Rule and validation forms are set up on the Banner system. Unless a new code is required, this step is only performed once.
- The person/employee will view, save, and print online output.
- Parameters validation criteria will be defined.

Note: This process is shared with the Human Resources and Financial Aid systems.

Communication Load Set Up



Section goal

The purpose of this section is to outline the setup process and detail the procedures to set up your Banner system to run the Communication Load and Removal Processes.

Objectives

At the end of this section, you will be able to identify and describe all Banner forms and processes that will be affected by the communication load and removal processes.

In this section

Before running the Communication Load (or Removal) process, there are several forms and rules that need to be verified, set or created.

Some of these forms may be previously established through other modules. Review these forms to see how they relate to the Communication Load and/or Communication Removal processes.

Form Description	Banner Name
Process Submission Controls	GJAPCTL
Letter Code Validation Table	GTVLETR
Initials Code Validation Table	STVINIT
Material Code Validation Table	STVMATL
Student Mail	SUAMAIL

Process Submission Controls

Banner form

Process Submission Controls (GJAPCTL)

The screenshot shows a web-based form titled "Process Submission Controls GJAPCTL 8.0 (UDCSysT)". The form is organized into several sections:

- Process:** A dropdown menu followed by a text input field.
- Parameter Set:** A dropdown menu.
- Printer Control:** A section containing:
 - Printer:** A dropdown menu.
 - Special Print:** A text input field.
 - Lines:** A checkbox.
 - Submit Time:** A text input field.
- Parameter Values:** A table with three columns:
 - Number:** A column of checkboxes.
 - Parameters:** A column of text input fields, with a dropdown menu above them.
 - Values:** A column of text input fields, with a dropdown menu above them.
- Submission:** A section containing:
 - Save Parameter Set as
 - Name:** A text input field.
 - Description:** A text input field.
 - Hold
 - Submit

Letter Code Validation Table

Banner form

Letter Code Validation Table (GTVLETR)

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

Initials Code Validation Table

Banner form

Initials Code Validation Table (STVINIT)

Initials	Full Name	Activity Date
ASK	Andy Kearney	23-JUN-2003
Email Address:	akearney@sct.com	
Title Lines One and Two:	Director of Admissions	
CJ	Counselor Jones	23-AUG-1999
Email Address:		
Title Lines One and Two:	Counselor Jones	XYZ High School
CVB	Colleen Bradley	24-AUG-2005
Email Address:	cbradley@sct.com	
Title Lines One and Two:	Director of Admissions	
JJKO	Julia Kershaw	07-APR-1987
Email Address:		
Title Lines One and Two:	West Coast Recruiter	

Material Code Validation Table

Banner form

Material Code Validation Table (STVMATL)

Material Code Validation STVMATL 8.0 (UDCSysT)		
Code	Description	Activity Date
1	Career Options Brochure	14-OCT-2003
2	Online Course Guidebook	14-OCT-2003
2ND	Second Follow-up	22-NOV-2006
A1	Email Applic. Acknowledgement	16-JUL-2003
A2	Email MIL	12-DEC-2006
AAA	Advisor follow up	11-SEP-2007
ACTS	ACT Search Tape Letter w/ Card	23-AUG-1999
ADAA	Admissions App Ackn Letter	23-MAY-1995
ADAI	Athletic Interest - Admissions	17-MAY-1995
ADI1	Interview One Follow-up Letter	23-MAY-1995
ADMI	Admissions Decision Letter	25-FEB-1998
ADMR	Admission Refusal	18-NOV-2007
ADPK	Admissions Packet	17-MAY-1995
ADV1	Degree advising letter	17-DEC-2002
APP	PG Admissions Application	05-APR-2005
BAH	History Brochure	13-NOV-2007
BASE	Baseball Brochure	01-FEB-1999
BCOM	Commerce Brochure	13-NOV-2007
BF	Admissions Mailing Label	10-MAR-2006
BMS	Orchestra Brochure	16-JUL-2003
BUSL	Business Admissions Letter	01-FEB-1999
C	Diploma/Certificates for C.Ed.	24-APR-2002
CATA	Course Catalog	31-DEC-1997

Student Mail

Banner form

Student Mail Form (SUAMAIL)

Student Mail SUAMAIL 8.0 (UDCSysT)

ID: N00011236 Davis, John

Student Mail

System:	S	Term:	FALL07	Module:	[blank]	Admin ID:	[blank]
Material:	ADAA	Letter:	ADM_APPL_ACKN	Source:	None	Initials:	[blank]
Initiated Date:	20-NOV-2007	Print Date:	[blank]	User:	ldavis	Originator:	[blank]
Quantity:	[blank]	Wait Days:	[blank]	Plan:	[blank]		
System:	[blank]	Term:	[blank]	Module:	[blank]	Admin ID:	[blank]
Material:	[blank]	Letter:	[blank]	Source:	[blank]	Initials:	[blank]
Initiated Date:	[blank]	Print Date:	[blank]	User:	[blank]	Originator:	[blank]
Quantity:	[blank]	Wait Days:	[blank]	Plan:	[blank]		
System:	[blank]	Term:	[blank]	Module:	[blank]	Admin ID:	[blank]
Material:	[blank]	Letter:	[blank]	Source:	[blank]	Initials:	[blank]
Initiated Date:	[blank]	Print Date:	[blank]	User:	[blank]	Originator:	[blank]
Quantity:	[blank]	Wait Days:	[blank]	Plan:	[blank]		
System:	[blank]	Term:	[blank]	Module:	[blank]	Admin ID:	[blank]
Material:	[blank]	Letter:	[blank]	Source:	[blank]	Initials:	[blank]
Initiated Date:	[blank]	Print Date:	[blank]	User:	[blank]	Originator:	[blank]
Quantity:	[blank]	Wait Days:	[blank]	Plan:	[blank]		

Communication Load Day-to-Day Operations



Communication Load Day-to-Day Operations Overview

Section goal

The purpose of this section is to explain the day-to-day or operational procedures to handle the Communication Load Process and the Communication Removal Process at your institution.

Objectives

In this section you will learn how to

- create the rules and set parameters used to process the communication load data
- run the Communication Load process
- run the Communication Removal process.

Communication Load Day-to-Day Operations Process Introduction

Introduction

The admissions office is responsible for guiding a student through the admissions process, from application to admission. The Communication Load Process is used to insert records into the GURMAIL table for tracking mailings sent to recruits and applicants.

What happens

The stages of the process are described in this table.

Stage	Description
Admissions/Recruiting Office	
1	Creates Recruit and/or Applicant Record
2	Receives Flat file
3	Loads data
4	Generates letters
Recruit and/or Applicant	
1	Receives letters and/or materials
Admissions/Recruiting Office	
1	Purges the data

Running the Communication Load Process

Purpose

The Communication Load Process (SURLOAD) is used to insert records into GURMAIL using a flat file of PIDMs as input. The process inserts a record with a minimum of PIDM, system indicator, and activity date. The process also provides you with the option of inserting additional data elements into the GURMAIL record via the input parameters (e.g., letter code, material code, initials). In addition, the Communication Removal Process (SURDEL) is used to purge records from GURMAIL based on certain input parameters.

SURLOAD allows schools to track any mailings to students that take place outside the realm of communication plan processing and/or letter generation using the Student Mail Form (SUAMAIL).

Communication load process overview

This process takes a flat file of PIDMs as input and inserts new records into the GURMAIL table. This process can be run from either job submission (GJAPCTL) or the host.

The process first determines whether any of the PIDMs in the input file are invalid Banner PIDMs (i.e., they don't exist in SPRIDEN). If a PIDM does not currently exist in Banner, that record is bypassed and noted in the audit log file. The PIDM, system indicator (e.g., S = Student, H = Human Resources, R = Financial Aid), and activity date (the date the file of PIDMs is loaded into GURMAIL) are all required. In addition, the process sets the **User** field on GURMAIL to SURLOAD for all records loaded via this process.

Log file

A log file is created that identifies each record loaded into GURMAIL, as well as indicating those records that were not loaded and why (e.g., no PIDM exists in Banner, duplicate letter). The log file also includes a count of how many records were actually loaded into GURMAIL. In addition, the log file displays all of the input parameters to the SURLOAD process and the system date. The following fields will be displayed for each record in the log file.

- ID
- Name
- System Indicator
- Comment (indicating why a record was not loaded into GURMAIL)

Banner process

Process Submission Controls GJAPCTL 8.0 (UDCSysT)

Process: SURLOAD Communication Load Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
01	File	
02	System Indicator	
03	Term Code	
04	Letter Code	
05	Module Code	
06	Material Code	
07	Date Printed	
08	Initials	

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
Enter file name

Submission

Save Parameter Set as Name: Description: Hold Submit

Steps

Follow these steps to complete the process.

1. Access the Communication Load Process (SURLOAD).
2. Perform a **Next Block** function.
3. Click the down arrow next to the **Printer** field to view the List of Values.
4. Select an appropriate printer.

Note: Normally, this value is set to DATABASE.

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

Note: Use the Parameter Definition Form (GJAPDEF) to change any of the optional fields to required fields at your institution.

Parameter	Value
File	As indicated by the instructor Example: /temp/pidms.dat
System Indicator	Enter <i>S</i> (Student).
Term Code	Term code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table, values from STVTERM
Letter Code	Letter code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table, values from GTVLETR
Module Code	Valid values: <i>R</i> Recruiting, <i>A</i> Admissions, <i>G</i> General Student; module code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table
Material Code	Material code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table, values from STVMATL

Parameter	Value
Date Printed	DD-MON-YYYY, enter the date printed
Initials	Initial code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table, values from STVINIT
Wait Days	Number of days between initiating and printing the letter
Quantity	Quantity of materials to be sent.
Generated or Published	(P or G); G is the default; enter <i>G</i> for generated materials or <i>P</i> for published materials

8. Perform a **Next Block** function.
9. Select the **Save Parameter Set as** checkbox if you want to save these parameters for future use.
10. Enter a name and description for your parameters in the **Name** and **Description** fields.
11. Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.
12. Click the **Save** icon.
13. Click the **Exit** icon.

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

Running the Communication Removal Process

Purpose

The Communication Removal Process (SURDEL) allows for the mass delete of SUAMAIL records. This process may be run from either job submission (GJAPCTL) or from the host. The input parameters for the delete process are similar to those used by the SURLOAD process, except that the purge process allows for the deletion of SUAMAIL records that were not created by the SURLOAD process (i.e., user is not equal to SURLOAD).

Banner process

The screenshot shows the 'Process Submission Controls GJAPCTL 8.0 (UDCSYST)' window. At the top, the 'Process' is set to 'SURDEL' and the 'Parameter Set' is empty. Below this is the 'Printer Control' section with fields for 'Printer', 'Special Print', 'Lines', and 'Submit Time'. The main section is 'Parameter Values', which is a table with two columns: 'Number' and 'Parameters'. The 'Parameters' column has a dropdown menu. Below the table, there are instructions: 'LENGTH: 6 TYPE: Character O/R: Required M/S: Single' and 'Enter Term Code'. At the bottom is the 'Submission' section with a checkbox for 'Save Parameter Set as', fields for 'Name' and 'Description', and radio buttons for 'Hold' and 'Submit'.

Number	Parameters	Values
01	Term Code	
02	Material Code	
03	System Indicator	
04	Letter Code	
05	Module Code	
06	Date Initiated	
07	Activity Date	
08	Initials	

LENGTH: 6 TYPE: Character O/R: Required M/S: Single
Enter Term Code

Save Parameter Set as Name: Description: Hold Submit

Steps

Follow these steps to complete the process.

1. Access the Communication Removal Process (SURDELT).
2. Perform a **Next Block** function.
3. Click the down arrow next to the **Printer** field to view the List of Values.
4. Select an appropriate printer.

Note: Normally, this value is set to DATABASE.

5. Click OK.
6. Perform a Next Block function to navigate to the Parameters Values block.
7. Enter these parameters.

Parameter	Value
Term Code	Term code for the record to be deleted from the GURMAIL table, values from STVTERM
Material Code	Material code for the record to be deleted from the GURMAIL table, values from STVMATL
System Indicator	System indicator for the record to be deleted from the GURMAIL table, values from GTVSYSI
Letter Code	Letter code for the record to be deleted from the GURMAIL table, values from GTVLETR
Module Code	Module code for . record to be deleted from the GURMAIL table
Date Initiated	DD-MON-YYYY, enter the date the records were initially created
Activity Date	DD-MON-YYYY, enter the date for the removal
Initials	Initial code for the record to be deleted from the GURMAIL table, values from STVINIT
User	User name for the record to be deleted from the GURMAIL table

Parameter	Value
Audit	Enter <i>A</i> to produce an audit report or <i>D</i> to delete the records from the database

8. Perform a **Next Block** function.
9. Select the **Save Parameter Set as** checkbox if you want to save these parameters for future use.
10. Enter a name and description for your parameters in the **Name** and **Description** fields.
11. Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.
12. Click the **Save** icon.
13. Click the **Exit** icon.

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

Log file

A log file is created that identifies all records deleted by the purge process. The log file contains these fields:

- ID
- Name
- System Indicator
- Value of all parameters entered.

Self Check

Directions

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

Question 1

List three fields on GURMAIL that can be updated using SURLOAD.

Question 2

A record is created on GURMAIL if an incorrect PIDM is loaded using SURLOAD.

True or False

Question 3

The SURDELT process will only delete records created by the SURLOAD process.

True or False

Answer Key for Self Check

Question 1

List three fields on GURMAIL that can be updated using SURLOAD

System Indicator, Letter code, Module Code, Material Code, Initials are possible answers.

Question 2

A record is created on GURMAIL if an incorrect PIDM is loaded using SURLOAD.

False. A record is not created on GURMAIL if an incorrect PIDM is loaded using SURLOAD.

Question 3

The SURDELT process will only delete records created by the SURLOAD process. *True or False*

False. The SURDELT process allows for the mass delete of any SUAMAIL records.

Secondary School Tracking Introduction



Secondary School Tracking Process

Introduction

Introduction

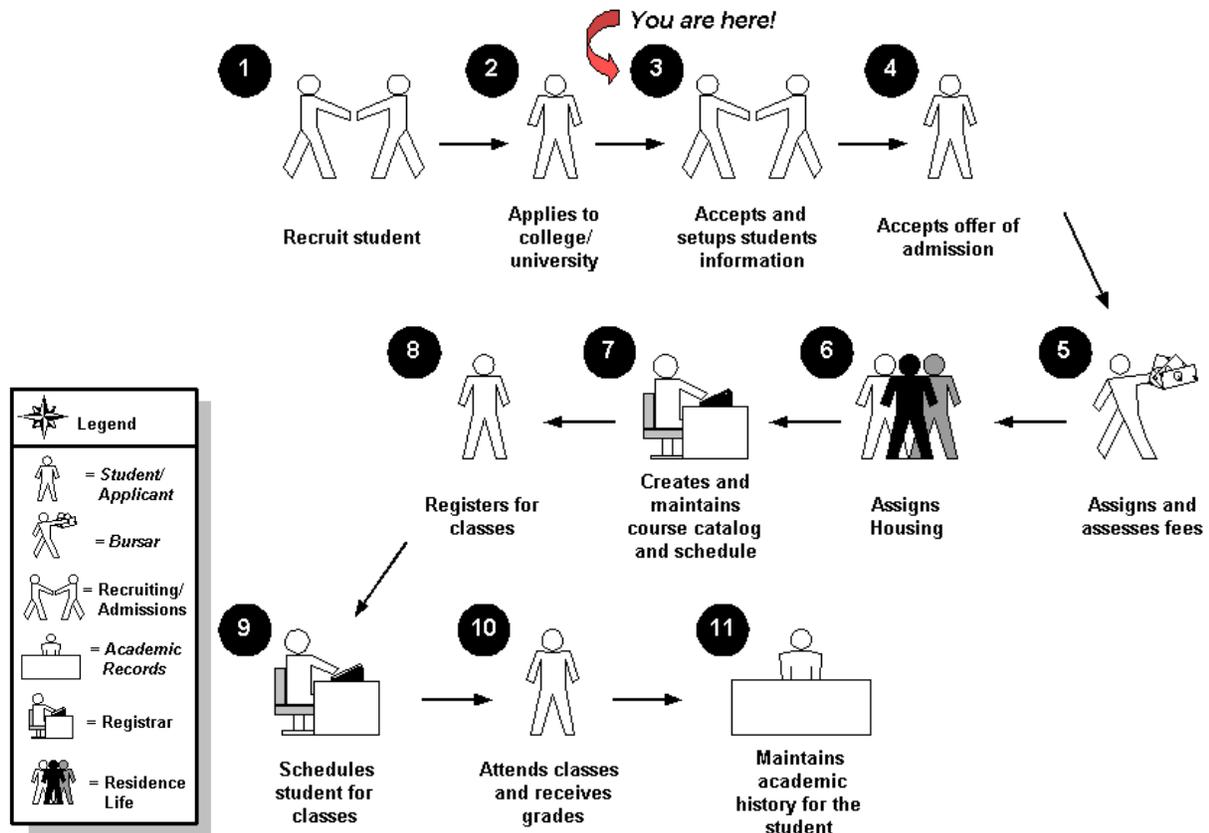
Secondary school tracking allows institutions to summarize data by high school or prior college for the following groups of people:

- Prospect - must have a **SRBRECR** record (SRARECR record in Banner)
- Applicant - must have a **SARADAP** record (SAAADMS record in Banner)
- Accepted Applicant - must have a **SARAPPD** record with a decision code having the **Significant Decision** and **Institutional Accept** flags checked (SAADCRV record in Banner)
- Confirmed - must have a **SARAPPD** record with a decision code having the **Significant Decision** and **Applicant Accept** flags checked.

Additionally, each of these records must have a High School Information Record (**SOAHSCH**) and/or Prior College Record (**SOAPCOL**) to be included in the views and/or reports.

Flow diagram

This diagram highlights where the Secondary School Tracking process occurs within the overall Student process.



About the process

- Rule and validation forms are set up on the Banner system. Unless a new code is required, this step is only performed once.
- The person/employee will view, save, and print online output.
- Parameters validation criteria will be defined.

Secondary School Tracking Set Up



Section goal

The purpose of this section is to outline the set-up process and detail the procedures to set-up your Banner system for viewing and reporting on secondary school data.

Objectives

At the end of this section, you will be able to identify and describe all Banner forms and processes that will be utilized by the secondary school tracking views and reports

Rules Forms That Control Selective Admissions

Introduction

Before Banner can process secondary school data, there are several forms and rules that need to be set or created.

Rule and validation forms

Prior to viewing and reporting on secondary school data in Banner, the following tables and forms must be developed.

Review the forms listed here. Some of these forms may be previously established through other modules (e.g., recruiting or admissions). Review these forms to see how they relate to the Secondary School Tracking views and reports.

Form Description	Banner Name
Source/Background Institution Geographic	GOASGEO
Admissions Application	SAAADMS
Admissions Decisions	SAADCRV
High School Information	SOAHSCH
Prior College Information	SOAPCOL
Recruit/Prospect Information	SRARECR
Source/Background Institution Code Validation	STVSBGI

Source/Background Institution Geographic Form

Banner form

Source/Background Institution Geographic Form (GOASGEO)

Source/Background Institution:

Source/Background Institution Address Information

Address:

City:

State/Prov:

ZIP/PC:

County:

Nation:

Source/Background Institution Geographic Assignments

Region	Description	Division	Description	Active	System Indicator
<input type="text"/>		<input type="text"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>

Admissions Application Form

Banner form

Admissions Application Form (SAAADMS)

Admissions Application SAAADMS 8.0 (UDCSysT)

ID: N00011236 Davis, John Term: View Current/Active Curricula

Application Curricula Fees, Mail Submission, Withdrawal Data Checklist Sources, Interests, Comments Contacts, Cohorts, Attributes

Application

Entry Term: 200506 Session 2005-06 Application Number: 1 Application Preference: Application Date: 09-MAY-2006

Admission Type: UA UG Admissions Office Application Status: D Decision Made

Student Type: N New First Time Application Status Date: 09-MAY-2006

Residence: 0 Undeclared Maintained By: S SYSTEM

Site: Application Decision: AP Admitted

Full or Part Time: Full Time Part Time None Application Decision Date: 09-MAY-2006

Outstanding Requirements: Maintained By: U USER

Curricula Summary - Primary

Priority Term	Program	Catalog	Level	Campus	College	Degree
1	200506 BA/THS	200506	Undergraduate	Main	Faculty of Arts	Bachelor of Arts

Field of Study Summary

Priority Term	Type	Field of Study	Department	Attached to Major
1	200506 MAJOR	Theatre	Theatre	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Admissions Decisions Form

Banner form

Admissions Decisions Form (SAADCRV)

Admissions Decision SAADCRV 8.0 (UDCSysT)

ID: N00011236 Davis, John Term: []

Decision Processing High School Review Prior College and Degree Review Test Score Review

Application Summary

Entry Term: 200506 Decision: AP Admitted Status: D Decision Made Application Date: 09-MAY-2006
 Application Number: 1 Admission Type: UA UG Admissions Session: [] Outstanding Items []
 Application Preference: [] Student Type: N New First Time Residence: 0 Undeclared Full or Part Time: []

Priority Program Level College Campus Degree Catalog Term Field of Study
 1 BA/THS UG FA M BA 200506 Type: MAJOR Code: THEA Department: THEA

Application Decision Application Decision Letter Decision Calculator Rating Review

Decision Data

Decision Code	Description	Significant Decision	Institution Acceptance	Applicant Acceptance	Institution Rejection	Inactive Application	Maintained by	Decision Date	User ID
AP	Admitted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	U USER	09-MAY-2006	TBROBYN
CO	Conditional Offer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	U USER	09-MAY-2006	TBROBYN
AI	Interview Requested	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	U USER	09-MAY-2006	TBROBYN
[]		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[]	[]	[]
[]		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[]	[]	[]

High School Information Form

Banner form

High School Information Form (SOAHSCH)

The screenshot shows a web browser window titled "High School Information SOAHSCH 8.0 (UDCSysT)". The main content area is titled "High School Details" and contains the following fields:

- ID:** N00011236 (dropdown) Davis, John (text)
- High School:** 050972 (dropdown) Washington High School
- Enrollment Planning Service Code:** (empty text)
- Graduation Date:** 09-MAY-2005 (calendar icon)
- Transcript Received Date:** 10-MAR-2005 (calendar icon)
- Class Rank and Size:** 94 / 945
- Percentile:** 90
- GPA:** 3.5
- Diploma:** (empty dropdown)
- College Preparation**
- Admissions Request:** (empty dropdown)

Prior College Information Form

Banner form

Prior College Information Form (SOAPCOL)

The screenshot shows a web browser window titled "Prior College SOAPCOL 8.0 (UDCSysT)". At the top, there is a header area with "ID: 300000006" and a name field containing "Ranson, Rose A.". Below this are three tabs: "Prior College and Degree" (selected), "Majors, Minors, Concentrations", and "Prior College Address".

The main content area is divided into two sections:

- Prior College:** This section contains fields for "Prior College:" (set to "2959" and "Villanova University"), "Enrollment Planning Service Code:" (set to "PA"), "Transcript Received Date:" (calendar icon), "Transcript Reviewed Date:" (calendar icon), "Admissions Request:" (set to "CLT1" and "College Transcript"), and an unchecked checkbox for "Official Transcript".
- Degree Details:** This section contains fields for "Degree:" (set to "000000" and "Undeclared"), "Degree Date:" (calendar icon), "Primary Degree Indicator" (unchecked checkbox), "Attended From:" (set to "01-SEP-1990" with calendar icon), "Attended To:" (set to "15-MAY-1990" with calendar icon), "Year:" (empty field), "College:" (empty dropdown), "Transfer Hours:" (set to "9.000"), "GPA:" (empty field), "Honors:" (empty dropdown), and "Goal:" (empty dropdown).

Recruit/Prospect Information Form

Banner form

Recruit/Prospect Information Form (SRARECR)

Recruit Prospect Information SRARECR 8.0 (UDCSysT)

ID: 300000006 Ranson, Rose A. Term: Level: View Current/Active Curricula

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

Recruit Data

Term: 200810 Autumn 2007 Selected
 Recruiter:
 Recruit Type: 08 Class of 2008
 Admission Type: ST Standard
 Student Type: N New First Time
 Recruit Status:
 Site:
 Residence: R Resident

Sequence Number: 1 Registered Add Date: 11-MAR-2008
 Session:
 Educational Level: HS Completed High School
 Educational Goal: BD Obtain Bachelor's Degree
 Citizen: Y U.S. Citizen
 Full or Part Time: Full Time Part Time None
 Legacy:
 Withdrawal Reason:
 Institution Attending:

Applied: Level All None
 Accepted: Level All None

Curricula Summary - Primary

Priority	Term	Program	Catalog	Level	Campus	College	Degree
1	200810	BA-ANTHRO	200810	Undergraduate	Main	Arts & Science	Bachelor of Arts

Field of Study Summary

Priority	Term	Type	Field of Study	Department	Attached to Major
1	200810	MAJOR	Anthropology		

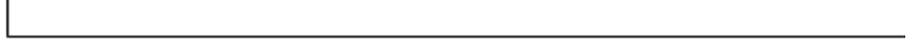
Source/Background Institution Code Validation Form

Banner form

Source/Background Institution Code Validation Form (STVSBGI)

Source or Background Institution	Description	Type	Source Indicator	Admissions Request	Electronic	FICE	Voice Response Message Number
000004	Foreign University	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
000011	Scottie College	C	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0002	Cranfield University	C	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0003	Bradley University	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0006	University of Bath	C	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0007	Loughbrough University	C	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
000777	UWS College	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0009	University of Manchester	C	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
000999	University of British Columbia	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0010	University of London	C	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001655	University of Dayton	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001710	Loyola University of Chicago	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001774	University of Chicago	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001775	U of I Urbana-Champaign	C	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001776	U of I at Chicago	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001989	Auburn University	C	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
002290	Michigan State University	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
003655	University of Texas	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0059	The University of Greenwich	C	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
009333	U of I at Springfield	C	<input checked="" type="checkbox"/>	CLT1 College Transcript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Secondary School Tracking Day-to-Day Operations



Secondary School Tracking Day-to-Day Operations Overview

Section goal

The purpose of this section is to explain the day-to-day or operational procedures to view and report on Secondary School Tracking at your institution.

Objectives

In this section you will learn how to

- view high school and prior college statistical information
- run enrollment summary counts and rate reports based on high school and prior college data.

Secondary School Tracking Day-to-Day Operations Process Introduction

Introduction

The admissions office is responsible for guiding a student through the admissions process, from application to admission. Secondary school tracking allows institutions to quickly assess their success rate over time at various high schools and colleges from which they receive prospects and applicants.

What happens

The stages of the process are described in this table.

Stage	Description
Recruiting/Admissions Office	
1	Recruiting/Admissions Collects Prior School Data
2	Recruiting/Admissions Views Statistical Data
3	Recruiting/Admissions Runs Statistical Reports

Viewing High School Information

Purpose

The Source/Background Institution Summary Form (SOASBSM) generates the high school data to be displayed. The view calculates the percentages for the appropriate fields. The form is entered in query mode.

The key block contains a source/background institution code that is required.

The Source/Background Institution Summary block contains the summary information for the institution in the key, such as a term code, a level code, a campus code, a college code, a program code, a major code, and a student type code that are optional. The fields in this block can be queried.

If the term code is left empty, the form displays all pertinent data for the source/background institution code in the key block for all available terms beginning with the most current term. If the term code is entered, the form displays all pertinent information for that term only.

Banner form

The screenshot shows a web browser window titled "Source/Background Institution Summary SOASBSM 8.0 (UDCSYST)". At the top, there is a dropdown menu for "Source or Background Institution" with the value "009007" and a text input field containing "Timberline Secondary".

The main content area is titled "Source or Background Institution Summary" and contains a table with the following columns: Term, Level, Campus, College, Program, Major, and Student Type. Below the table header, there are three rows of data, each with a set of input fields for "Class Size", "Number of Prospects", "Number of Applicants", "Percentage of Applicants", "Number Accepted", "Percentage of Acceptances", "Number of Confirmations", and "Percentage of Confirmations".

At the bottom of the form, there is a section titled "Query Totals" with input fields for "Number of Prospects" (0), "Number of Applicants" (0), "Number Accepted" (0), "Number of Confirmations" (0), "Percentage of Acceptances", and "Percentage of Confirmations".

Steps

Follow these steps to complete the process.

1. Access the Source/Background Institution Summary Form (SOASBSM).
2. Click the down arrow next to the **Source or Background Institution** field to access the Source/Background Institution Query-Only Form (SOISBGI).
3. Execute the query.
4. Select the high school you want to view by double clicking in the **Type** field to return the information to SOASBSM.
5. Perform a **Next Block** function.
6. Execute the query to view the institution's information.
7. Review the following values.

Note: At the bottom of the window, the totals for the query are listed by number of prospects, number of applicants, number of applicants accepted, and number of student confirmations.

Field	Value
Term	Term code
Level	Level code
Campus	Campus code
College	College code
Program	Program code
Major	Major code
Student Type	Student type code

Field	Value
Class Size	<p>Number of seniors, obtained from SORBDMO_NO_OF_SENIORS on SOABGIY if available for the correct year</p> <p>Note: If no value exists in this field for the correct year, the program will try to use the Class Size field (SORHSCH_CLASS_SIZE) on SOAHSCH for any ID selected in the query; regardless of which Class Size field is used, the Grad Date field (SORHSCH_GRADUATION_DATE) must be entered.</p>

8. Continue reviewing values.

Field	Value
Number of Prospects	Number of prospects for the term
Number of Applicants	Number of applicants for the term
Percentage of Applicants	Percentage of applicants (rate of number of applicants to senior class or high school size)
Number Accepted	Number of applicants accepted for admission (Institutional Accept flag checked)
Percentage of Acceptances	Percentage of acceptances (number of acceptances to number of applicants)
Number of Confirmations	<p>Number of student confirmations, (those having decision code of "applicant accept" selected). Students are added to this counter if they have the decision code that is entered in the External Code field of the GTVSDAX record with an Internal Code of <i>DEPOPAID</i> and a Group (Code) of <i>DEPOSIT</i>.</p>
Percentage of Confirmations	Percentage of confirmations (number of confirmed students to number of accepted applicants)

9. Click the **Exit** icon.

Running the High School Information Summary Report

Purpose

Use the Source/Background Summary Report (SORSBSM) to collect high school information similar to what is found on the Source/Background Institution Summary Form (SOASBSM).

Banner form

The screenshot shows a web-based form titled "Process Submission Controls GIAPCTL 8.0 (UDCSysT)". The form is divided into several sections:

- Process:** A dropdown menu set to "SORSBSM" and a text field containing "Source/Background Summary".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. The "Values" column has a dropdown menu. The table contains 8 rows of data:

Number	Parameters	Values
01	High School Code	
02	Term Code	
03	Level Code	
04	Campus Code	
05	College Code	
06	Degree Code	
07	Program Code	
08	Major Code	
- Submission:** A section with a "Save Parameter Set as" checkbox, "Name:" and "Description:" text fields, and radio buttons for "Hold" and "Submit".

Additional text below the table: "LENGTH: 6 TYPE: Character O/R: Optional M/S: Multiple" and "Enter the High School SBGI Code for reporting counts".

Steps

Follow these steps to complete the process.

1. Access the Source/Background Summary Report (SORSBSM).
2. Perform a **Next Block** function.
3. Click the down arrow next to the **Printer** field to view the List of Values.
4. Select an appropriate printer.
5. Click **OK**.
6. Perform a **Next Block** function to navigate to the Parameters Values block.
7. Enter these parameters (all are optional).

Parameter	Value
High School Code	Source/background institution code for reporting counts, values from STVSBGI
Term Code	Term code for the application and recruiting records you wish to include, values from STVTERM
Level Code	Level code for the application and recruiting records you wish to include, values from STVLEVL
Campus Code	Campus code for the application and recruiting records you wish to include, values from STVCAMP
College Code	College code for the application and recruiting records you wish to include, values from STVCOLL
Degree Code	Degree code for the application and recruiting records you wish to include, values from STVDEGC
Program Code	Program code for the application and recruiting records you wish to include, values from SMAPRLE
Major Code	Major code for the application and recruiting records you wish to include, values from STVMAJR
Student Type	Student type code for the application and recruiting records you wish to include, values from STVSTYP

Parameter	Value
Sort by Term, Level and Campus	Enter <i>Y</i> to sort by term/campus/level or <i>N</i> to sort by term and level.

8. Perform a **Next Block** function.
9. Select the **Save Parameter Set as** checkbox if you want to save these parameters for future use.
10. Enter a name and description for your parameters in the **Name** and **Description** fields.
11. Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.
12. Click the **Save** icon.
13. Click the **Exit** icon.

Viewing Prior College Information

Purpose

The Prior College Enrollment Summary Form (SOAPCSM) generates the prior college data to be displayed. The view calculates the percentages for the appropriate fields. The form is entered in query mode.

The key block contains a source/background institution code that is required.

The Source/Background Institution Summary block contains the summary information for the institution in the key block, such as a term code, a level code, a campus code, a college code, a program code, a major code, and a student type code that are optional. The fields in this block can be queried.

If the term code is left empty, the form displays all pertinent data for the source/background institution code in the key block for all available terms beginning with the most current term. If the term code is entered, the form displays all pertinent information for that term only.

Banner form

The screenshot shows a web browser window titled "Prior College Enrollment Summary SOAPCSM 8.0 (UDCSysT)". The "Source or Background Institution" field is set to "030303" and "Pennsylvania State University". Below this is a table titled "Source or Background Institution Summary" with columns for Term, Level, Campus, College, Program, Major, and Student Type. The table contains three rows of data, each with fields for "Number of Prospects:", "Number of Applicants:", "Number Accepted:", "Percentage of Acceptances:", "Number of Confirmations:", and "Percentage of Confirmations:". At the bottom of the window is a "Query Totals" section with the same set of fields.

Term	Level	Campus	College	Program	Major	Student Type

Query Totals

Number of Prospects:		Number Accepted:		Number of Confirmations:	
Number of Applicants:		Percentage of Acceptances:		Percentage of Confirmations:	

Steps

Follow these steps to complete the process.

1. Access the Prior College Enrollment Summary Form (SOAPCSM).
2. Click the down arrow next to the **Source or Background Institution** field to access the Source/Background Institution Query-Only Form (SOISBGI).
3. Execute the query.
4. Select the college you want to view by double clicking in the **Type** field to return the information to SOASBSM.
5. Perform a **Next Block** function.
6. Execute the query to view the institution's information.
7. Review these fields and values.

Note: At the bottom of the window, the totals for the query are listed by number of prospects, number of applicants, number of applicants accepted, and

number of student confirmations.

Field	Value
Term	Term code
Level	Level code
Campus	Campus code
College	College code
Program	Program code
Major	Major code
Student Type	Student type code
Number of Prospects	Number of prospects for the term
Number of Applicants	Number of applicants for the term
Number Accepted	Number of applicants accepted for admission (Institutional Accept flag checked)

8. Continue reviewing fields and actions.

Field	Value
Percentage of Acceptances	Percentage of acceptances (number of acceptances to number of applicants)
Number of Confirmations	Number of student confirmations (those having decision code of <i>Applicant Accept</i> selected); students are added to this counter if they have the decision code that is entered in the External Code field of the GTVSDAX record with an internal code of DEPOPAID and a group code of DEPOSIT
Percentage of Confirmations	Percentage of confirmations (number of confirmed students to number of accepted applicants)

9. Click the **Exit** icon.

Running the Prior College Information Summary Report

Purpose

Use the Prior College Summary Report (SORPCSM) to collect prior college summary information similar to what is found on the Prior College Enrollment Summary Form (SOAPCSM).

Banner form

Process: SORPCSM | Prior Col. Enrollment Summary | Parameter Set: []

Printer Control
Printer: [] | Special Print: [] | Lines: 55 | Submit Time: []

Parameter Values

Number	Parameters	Values
01	College (SBGI) Code	[]
02	Term Code	[]
03	Level Code	[]
04	Campus Code	[]
05	College Code	[]
06	Degree Code	[]
07	Program Code	[]
08	Major Code	[]

LENGTH: 6 TYPE: Character O/R: Optional M/S: Multiple
Enter the Prior College (SBGI) Code for processing.

Submission
 Save Parameter Set as | Name: [] | Description: [] | Hold | Submit

Steps

Follow these steps to complete the process.

1. Access the Prior College Summary Report (SORPCSM).
2. Perform a **Next Block** function.
3. Click the down arrow next to the **Printer** field to view the List of Values.
4. Select an appropriate printer.
5. Click **OK**.
6. Perform a **Next Block** function to navigate to the Parameters Values block.
7. Enter these parameters.

Note: All parameters are optional.

Parameter	Value
College (SBGI) Code	College code, values from STVSBGI
Term Code	Term code for the application and recruiting records you wish to include, values from STVTERM
Level Code	Level code for the application and recruiting records you wish to include, values from STVLEVEL
Campus Code	Campus code for the application and recruiting records you wish to include, values from STVCAMP
College Code	College code for the application and recruiting records you wish to include, values from STVCOLL
Degree Code	Degree code for the application and recruiting records you wish to include, values from STVDEGC
Program Code	Program code for the application and recruiting records you wish to include, values from SMAPRLE

Parameter	Value
Major Code	Major code for the application and recruiting records you wish to include, values from STVMAJR
Student Type	Student type code for the application and recruiting records you wish to include, values from STVSTYP
Sort by Level and Campus	Enter Y to sort by term/level/campus or N to sort by term and level only.

8. Perform a **Next Block** function.
9. Select the **Save Parameter Set as** checkbox if you want to save these parameters for future use.
10. Enter a name and description for your parameters in the **Name** and **Description** fields.
11. Select the **Hold** radio button if you want to run this process at a later time or the **Submit** radio button if you want this process to run immediately.
12. Click the **Save** icon.
13. Click the **Exit** icon.

Self Check

Directions

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

Question 1

What four groups of people are tracked in Secondary School Tracking?

Question 2

List three fields that can be queried on SOAPCSM.

Answer Key for Self Check

Question 1

What four groups of people are tracked in Secondary School Tracking?

Prospects, Applicants, Accepted Applicants, Confirmed (Applicants)

Question 2

List three fields that can be queried on SOAPCSM.

Term, Level, College, Campus, Program, Major, Student Type are possible answers.

Admissions Rating/Administrator Roles Introduction



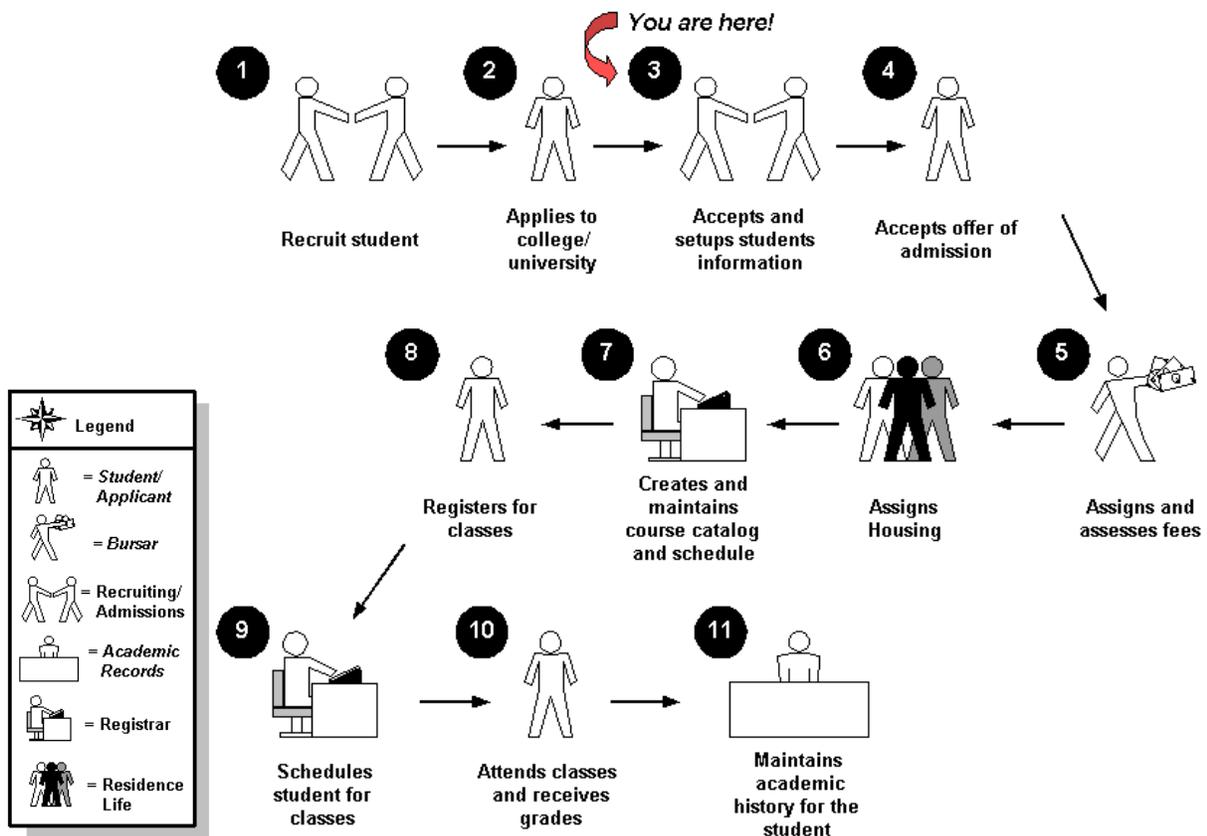
Admissions Rating/Administrator Roles Overview

Introduction

The Admissions office is responsible for defining the rules and parameters for running the Admissions Rating/Batch Entry processes, which allows institutions to group applicants together to enter admissions ratings and/or admission decisions into the system.

Flow diagram

This diagram highlights where the Admissions Rating/Batch Entry processes occurs within the overall Student process.



About the process

- Rule and validation forms are set up on the Banner system. Unless a new code is required, this step is only performed once.
- The person/employee will view, save, and print online output.
- Parameters validation criteria will be defined.

Admissions Rating/Administrator Roles Set Up



Section goal

The purpose of this section is to outline the set-up process and detail the procedures to set-up your Banner system to run the Admissions Rating/Batch Entry processes.

Objectives

At the end of this section, you will be able to create the rules and set parameters used to run the admissions rating and batch entry processes.

Rule and Validation Forms That Control Selective Admissions

Introduction

Before Banner can process, Admission Ratings and Batch Entry processes there are several forms and rules that need to be set or created.

The Admissions Rating Type Rules Form (SAARRCT) allows each institution to define minimum and maximum values for each rating type. The rules form also allows institutions to assign rating types to administrators. This can reduce batch entry and data entry on SAARRAT because the assigned rating types default if the administrative ID and role are entered in the key.

Rule and validation forms

These forms are used to set the rules and parameters in Banner for handling the Admission Rating/Batch Entry processes. Directions on how to set the parameters start on the next page.

Form Description	Banner Name
Admissions Rating Type Validation	STVRATP
Administrative Role Code Validation	STVRADM
Administrator Role Rules	SOAADAS
Administrator's Assignments	SOAAINF
Admissions Rating Table	SAARRCT
Admissions Factor Code Validation	STVAFCT
Admissions Rating Factor Rules	SAARRFT
Admissions Rating Formula Definition	SAARRDF

Admissions Rating Type Validation

Banner form

Admissions Rating Type Validation (STVRATP)

Admissions Rating Type Validation STVRATP 8.0 (UDCSysT)			
Code	Description	System Req	Activity Date
0000	Application Rater	<input checked="" type="checkbox"/>	08-FEB-2000
1111	Recruiter	<input checked="" type="checkbox"/>	19-JUL-2000
ACAD	Academic Rating	<input type="checkbox"/>	06-DEC-2000
ACTV	Activity Rating	<input type="checkbox"/>	06-DEC-2000
APPL	Application Standard	<input type="checkbox"/>	25-JUN-2006
APTT	Aptitude Test	<input type="checkbox"/>	25-JUN-2006
ART	Music/ART	<input type="checkbox"/>	06-DEC-2000
AUTO	Automated Academic Rating	<input type="checkbox"/>	12-AUG-2003
BAH	BAH Rating	<input type="checkbox"/>	18-NOV-2007
BCOM	BCOM Rating	<input type="checkbox"/>	18-NOV-2007
CHANC	Chancellor's Scholarship	<input type="checkbox"/>	15-NOV-2007
CSEI	International Reviewer	<input type="checkbox"/>	15-SEP-2007
CSER	Departmental Reviewer	<input type="checkbox"/>	15-SEP-2007
ESSAY	Essay	<input type="checkbox"/>	06-DEC-2000
FINA	Financial Aid Rater	<input type="checkbox"/>	26-JUN-2003
INTER	Interview Rating	<input type="checkbox"/>	06-DEC-2000
LEAD	Leadership Rating	<input type="checkbox"/>	06-DEC-2000
MATD	Math Deficient	<input type="checkbox"/>	24-OCT-2005
MEDIC	Medical School Rating	<input type="checkbox"/>	21-JUN-2006
MONO	Monologue Rater	<input type="checkbox"/>	19-SEP-2001
PORT	Portfolio Rater	<input type="checkbox"/>	19-SEP-2001
PSE	PSE Rating	<input type="checkbox"/>	18-NOV-2007
QU001	Admissions Rating	<input type="checkbox"/>	18-NOV-2007

Administrative Role Code Validation Form

Banner form

Administrative Role Code Validation Form (STVRADM)

Administrative Role Code Validation STVRADM 8.0 (UDCSysT)			
Code	Description	Rater Indicator	Activity Date
ADVISOR	Academic Advisor	<input type="checkbox"/>	24-AUG-2004
ALUM_REC	Alumni Recruiter	<input type="checkbox"/>	27-FEB-2006
AUTO	Automated Admission Rating	<input checked="" type="checkbox"/>	12-AUG-2003
AUTO2	Automated Rating	<input checked="" type="checkbox"/>	18-NOV-2007
BIOL	Biology Advisor	<input type="checkbox"/>	12-SEP-2007
CASHIER	Student Cashier Counselor	<input type="checkbox"/>	03-NOV-2005
CSE	CSE Dept. Reviewer	<input checked="" type="checkbox"/>	15-SEP-2007
CSEI	CSE International Reviewer	<input checked="" type="checkbox"/>	15-SEP-2007
ED_COUNS	Education Counselors	<input type="checkbox"/>	25-OCT-2005
ESSAY	Essay Reader	<input checked="" type="checkbox"/>	18-AUG-2002
FINAIDRATE	Financial Aid Rater	<input checked="" type="checkbox"/>	26-JUN-2003
GR_GURNEE	Graduate Advisor Gurnee DVUC	<input checked="" type="checkbox"/>	31-DEC-2007
INTERVIEW	Interviewer	<input checked="" type="checkbox"/>	18-AUG-2002
MEDIC	Med School Applicant Rating	<input checked="" type="checkbox"/>	21-JUN-2006
PORTFOLIO	Portfolio Rater	<input checked="" type="checkbox"/>	29-APR-2003
PREMED	Premedicine Advisor	<input type="checkbox"/>	12-SEP-2007
RATER	Application Desc Rater	<input checked="" type="checkbox"/>	08-FEB-2000
READER	Application Reader	<input checked="" type="checkbox"/>	29-APR-2002
RECR1	Alberta Recruiter	<input type="checkbox"/>	13-NOV-2007
RECRUITER	Assigned Recruiter	<input checked="" type="checkbox"/>	29-APR-2002
SCHOLAR	Scholarship Committee	<input checked="" type="checkbox"/>	19-NOV-2007
TEST_AUTO	Automated Test Rater	<input type="checkbox"/>	21-SEP-2005
		<input type="checkbox"/>	

Administrator Role Rules Form

Banner form

Administrator Role Rules Form (SOAADAS)

The screenshot displays the 'Administrator Role Rules SOAADAS 8.0 (UDCSysT)' window. At the top, there are input fields for 'ID' (RAT000020), a name field (Armstrong, Della), 'Role' (RATER), 'Effective Term' (empty), and a checked 'Active Only' checkbox.

The main content is divided into two sections:

- Rule Definitions:** A table with columns: Active (checkbox), Rule (input), Effective Term (dropdown), Description (input), Role (dropdown), and Description (input). The first row is active, and there are five empty rows below it.
- Assignment Rules:** A table with columns: Rule (input), Data Element (dropdown), Operator (checkbox), From Value (dropdown), and To Value (dropdown). There are eight empty rows for defining assignment rules.

Administrator's Assignments Form

Banner form

Administrator's Assignments Form (SOAAINF)

Administrators Assignments SOAAINF 8.0 (UDCSysT)

ID: Role: Term:

Term	Role	Module	ID	Name	Sequence	Source
200310	RATER	A	458664611	Adams, Carol	1	S
200310	RATER	A	990664600	Blabbs, Kathy	2	S
200310	RATER	A	N88664609	Colby, Sandra	1	S
200310	RATER	A	786243659	Connors, Stephanie	1	S
200310	RATER	A	988664596	Cunningham, Randall	2	S
200310	RATER	A	988664598	Dangers, John	2	S
200310	RATER	A	N88664605	Edwards, John	1	S
200310	RATER	A	N88664651	Fitzgerald, Clifford	1	S
200310	RATER	A	908664602	Gelton, Tom	1	S
200310	RATER	A	098664599	Higgins, Henry	2	S
200310	RATER	A	88664613	Hudson, Paula	1	S
200310	RATER	A	088664614	James, Robert	1	S
200310	RATER	A	788664603	Jenkins, Henrietta	1	S
200310	RATER	A	288664644	Mayfield, Bridget	1	S
200310	RATER	A	288664645	Mayfield, Robert	1	S
200310	RATER	A	N88664642	Murphy, Hope	1	S
200310	RATER	A	N88664604	Queenan, Sophia	1	S
200310	RATER	A	N88664650	Reese, Della	1	S
200310	RATER	A	N88664649	Regina, Ann	1	S
200310	RATER	A	N88664648	Regina, Sarah	1	S

Admissions Rating Table

Banner form

Admissions Rating Table (SAARRCT)

Admissions Rating Type Rules SAARRCT 8.0 (UDCSysT)

Term: Fall 2002

Term Rating Type Rules

Effective Term	Rating Type	Description	Minimum Rating	Maximum Rating	Activity Date
<input type="text" value="000000"/>	<input type="text" value="CHANC"/>	Chancellor's Scholarship	<input type="text" value="0.00"/>	<input type="text" value="1.00"/>	<input type="text" value="15-NOV-2007"/>
<input type="text" value="000000"/>	<input type="text" value="CSEI"/>	International Reviewer	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="15-SEP-2007"/>
<input type="text" value="000000"/>	<input type="text" value="CSER"/>	Departmental Reviewer	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="15-SEP-2007"/>
<input type="text" value="200310"/>	<input type="text" value="0000"/>	Application Rater	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="19-SEP-2001"/>

Administrator Rating Type Rules

Effective Term	Administrator ID	Name	Administrator Role	Rating Type	Minimum Rating	Maximum Rating	Activity Date
<input type="text" value="200310"/>	<input type="text" value="RAT000040"/>	Hawley, Cliff	RATER	0000	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="06-MAY-2002"/>
<input type="text" value="200310"/>	<input type="text" value="71000010"/>	Eubanks, William	INTERVIEW	ACAD	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="18-AUG-2002"/>
<input type="text" value="200310"/>	<input type="text" value="71000010"/>	Eubanks, William	ESSAY	ESSAY	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="18-AUG-2002"/>
<input type="text" value="200405"/>	<input type="text" value="FACULTY03"/>	Brobyn, Tracy	RATER	ACAD	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="25-JUN-2006"/>
<input type="text" value="200405"/>	<input type="text" value="FACULTY03"/>	Brobyn, Tracy	RATER	APPL	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="25-JUN-2006"/>
<input type="text" value="200405"/>	<input type="text" value="FACULTY03"/>	Brobyn, Tracy	RATER	APTT	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="25-JUN-2006"/>
<input type="text" value="200405"/>	<input type="text" value="FACULTY03"/>	Brobyn, Tracy	RATER	ESSAY	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="text" value="25-JUN-2006"/>

Admissions Factor Code Validation

Banner form

Admissions Factor Code Validation (STVAFCT)

Code	Description	User ID	Activity Date
ACAD_PROFILE	Academic Profile	BJOHNSON	24-APR-2002
ACT_COMPOSITE	ACT Composite Score	BJOHNSON	24-APR-2002
ADVM	Advanced Math	DHARRISO	24-OCT-2005
ALG1	Algebra 1	DHARRISO	24-OCT-2005
ALG2	Algebra 2	DHARRISO	24-OCT-2005
APPLICATION	Application Standard	TBROBYN	25-JUN-2006
APTITUDE	Aptitude Test	TBROBYN	14-JUL-2006
ART_PORTFOLIO	Art Portfolio	CMCCORMI	28-APR-2003
BS_MCAT	Biological Sciences	BJOHNSON	21-JUN-2006
FACTOR10	Factor Code	CMCCORMI	28-APR-2003
GEOM	Geometry	DHARRISO	24-OCT-2005
GPA	GPA	BJOHNSON	12-AUG-2003
GPA_PREMED	Pre-Med GPA	BJOHNSON	21-JUN-2006
HSPR	HS Percentile	CMCCORMI	28-APR-2003
INTERVIEW	Interview	CMCCORMI	28-APR-2003
LEGACY_INFO	Legacy Information	BJOHNSON	24-APR-2002
MCAT_TOTAL	Total of MCAT Scores	BJOHNSON	21-JUN-2006
PERSONAL_ESSAY	Personal Essay	BJOHNSON	24-APR-2002
PS_MCAT	Physical Sciences	BJOHNSON	21-JUN-2006
S01_TEST	SAT Verbal	CMCCORMI	28-APR-2003
TOTAL_FACTOR	Total calc rating as factor	TBROBYN	25-JUN-2006

Admissions Rating Factor Rules

Banner form

Admissions Rating Factor Rules (SAARRFT)

Admissions Rating Factor Rules SAARRFT 8.0 (UDCSysT)

Term: 200710 Fall 2006
 Level:
 Campus:
 College:
 Degree:
 Program:

Field of Study Type:
 Field of Study Code:
 Admission Type:
 Student Type:
 Residence:

Term	Level	Campus	College	Degree	Program	Field of Study Type	Code	Curricula	Admission Type	Student Type	Residence Code
200710	MD							Primary			
Factor: BS_MCAT Table Name: SORTEST Select Column: SORTEST_TEST_SCORE Where Column: SORTEST_TESC_CODE Value: BS Activity Date: 21-JUN-2006											
200710	MD							Primary			
Factor: GPA_PREMED Table Name: SORDEGR Select Column: SORDEGR_GPA_TRANSF Where Column: Value: Activity Date: 21-JUN-2006											
200710	MD							Primary			
Factor: PS_MCAT Table Name: SORTEST Select Column: SORTEST_TEST_SCORE Where Column: SORTEST_TESC_CODE Value: PS Activity Date: 21-JUN-2006											

Assigning Rating Codes

Purpose

Use the Admissions Rating Type Validation Form (STVRATP) to define codes that identify all the types of ratings an institution might use. Possible examples include ratings for different application forms, personal ratings, academic ratings, athletic ratings, and art or music ratings. The rating type 0000 - Application Rater is system required.

Banner form

Admissions Rating Type Validation STVRATP 8.0 (UDCSysT)			
Code	Description	System	Req Activity Date
0000	Application Rater	<input checked="" type="checkbox"/>	08-FEB-2000
1111	Recruiter	<input checked="" type="checkbox"/>	19-JUL-2000
ACAD	Academic Rating	<input type="checkbox"/>	06-DEC-2000
ACTV	Activity Rating	<input type="checkbox"/>	06-DEC-2000
APPL	Application Standard	<input type="checkbox"/>	25-JUN-2006
APTT	Aptitude Test	<input type="checkbox"/>	25-JUN-2006
ART	Music/ART	<input type="checkbox"/>	06-DEC-2000
AUTO	Automated Academic Rating	<input type="checkbox"/>	12-AUG-2003
BAH	BAH Rating	<input type="checkbox"/>	18-NOV-2007
BCOM	BCOM Rating	<input type="checkbox"/>	18-NOV-2007
CHANC	Chancellor's Scholarship	<input type="checkbox"/>	15-NOV-2007
CSEI	International Reviewer	<input type="checkbox"/>	15-SEP-2007
CSER	Departmental Reviewer	<input type="checkbox"/>	15-SEP-2007
ESSAY	Essay	<input type="checkbox"/>	06-DEC-2000
FINA	Financial Aid Rater	<input type="checkbox"/>	26-JUN-2003
INTER	Interview Rating	<input type="checkbox"/>	06-DEC-2000
LEAD	Leadership Rating	<input type="checkbox"/>	06-DEC-2000
MATD	Math Deficient	<input type="checkbox"/>	24-OCT-2005
MEDIC	Medical School Rating	<input type="checkbox"/>	21-JUN-2006
MONO	Monologue Rater	<input type="checkbox"/>	19-SEP-2001
PORT	Portfolio Rater	<input type="checkbox"/>	19-SEP-2001
PSE	PSE Rating	<input type="checkbox"/>	18-NOV-2007
QU001	Admissions Rating	<input type="checkbox"/>	18-NOV-2007

Steps

Follow these steps to complete the process.

1. Access the Admissions Rating Type Validation Form (STVRATP).
2. Perform an **Insert Record** function.
3. Enter *INDEX* in the **Code** field.
4. Enter *Admissions Index* in the **Description** field.
5. Perform an **Insert Record** function.
6. Define any other codes your institution uses.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Entering Role Codes

Purpose

The Administrative Role Code Validation Form (STVRADM) allows institutions to define various types of administrator roles. Examples of such roles are recruiter, reader, and alumni recruiter. The Administrator Role Rules Form (SOAADAS) and the Administrator's Assignments Form (SOAAINF) use these codes.

The **Rater Indicator** checkbox is used to designate that a role can assign ratings on the Admissions Rating Form (SAARRAT) and the Admissions Decision and Rating Batch Entry Form (SAADCBT) when checked.

Banner form

Administrative Role Code Validation STVRADM 8.0 (UDCSysT)			
Code	Description	Rater Indicator	Activity Date
ADVISOR	Academic Advisor	<input type="checkbox"/>	24-AUG-2004
ALUM_REC	Alumni Recruiter	<input type="checkbox"/>	27-FEB-2006
AUTO	Automated Admission Rating	<input checked="" type="checkbox"/>	12-AUG-2003
AUTO2	Automated Rating	<input checked="" type="checkbox"/>	18-NOV-2007
BIOL	Biology Advisor	<input type="checkbox"/>	12-SEP-2007
CASHIER	Student Cashier Counselor	<input type="checkbox"/>	03-NOV-2005
CSE	CSE Dept. Reviewer	<input checked="" type="checkbox"/>	15-SEP-2007
CSEI	CSE International Reviewer	<input checked="" type="checkbox"/>	15-SEP-2007
ED_COUNS	Education Counselors	<input type="checkbox"/>	25-OCT-2005
ESSAY	Essay Reader	<input checked="" type="checkbox"/>	18-AUG-2002
FINAIDRATE	Financial Aid Rater	<input checked="" type="checkbox"/>	26-JUN-2003
GR_GURNEE	Graduate Advisor Gurnee DVUC	<input checked="" type="checkbox"/>	31-DEC-2007
INTERVIEW	Interviewer	<input checked="" type="checkbox"/>	18-AUG-2002
MEDIC	Med School Applicant Rating	<input checked="" type="checkbox"/>	21-JUN-2006
PORTFOLIO	Portfolio Rater	<input checked="" type="checkbox"/>	29-APR-2003
PREMED	Premedicine Advisor	<input type="checkbox"/>	12-SEP-2007
RATER	Application Desc Rater	<input checked="" type="checkbox"/>	08-FEB-2000
READER	Application Reader	<input checked="" type="checkbox"/>	29-APR-2002
RECR1	Alberta Recruiter	<input type="checkbox"/>	13-NOV-2007
RECRUITER	Assigned Recruiter	<input checked="" type="checkbox"/>	29-APR-2002
SCHOLAR	Scholarship Committee	<input checked="" type="checkbox"/>	19-NOV-2007
TEST_AUTO	Automated Test Rater	<input type="checkbox"/>	21-SEP-2005
		<input type="checkbox"/>	

Steps

Follow these steps to complete the process.

1. Access the Administrative Role Code Validation Form (STVRADM).
2. Enter a code for role in the **Code** field.
3. Enter a description for your role in the **Description** field.
4. Check the **Rater Indicator** checkbox, if necessary.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Defining Rating Codes

Purpose

Institutions should use this form to define and tailor each type of rating to meet their individual needs. The data contained in this form is stored in the Admissions Rating Table (SAARRCT). All rating types to be used must be defined in the Term Rating Type Rules block. Use of the Administrator Rating Type Rules block is optional.

Banner form

Term: 200710 Fall 2006

Term Rating Type Rules

Effective Term	Rating Type	Description	Minimum Rating	Maximum Rating	Activity Date
000000	CHANC	Chancellor's Scholarship	0.00	1.00	15-NOV-2007
000000	CSEI	International Reviewer	1.00	10.00	15-SEP-2007
000000	CSEI	Departmental Reviewer	1.00	10.00	15-SEP-2007
200310	0000	Application Rater	1.00	10.00	19-SEP-2001

Administrator Rating Type Rules

Effective Term	Administrator ID	Name	Administrator Role	Rating Type	Minimum Rating	Maximum Rating	Activity Date
200710	GENERIC	Administrator, Generic	AUTO	MATD	0.00	10.00	24-OCT-2005

Steps

Follow these steps to complete the process.

1. Access the Admissions Rating Type Rules Form (SAARRCT).
2. Enter the term in the **Term** field.
3. Navigate to the Term Rating Type Rules block.

- Enter these values.

Note: The value in the **Minimum Rating** field defaults in for the assigned rating type based on the rules defined for this rating type in the Term Rating Type Rules block.

Note: The value in the **Maximum Rating** field defaults in for the assigned rating type based on the rules defined for this rating type in the Term Rating Type Rules block.

Field	Value
Effective Term	Defines the term for which this rule becomes effective; the rule is effective for this term and all future terms.
Rating Type	Required; rating type is entered here so that the guidelines for the rating associated with this rating type can be defined; values from STVRATP.
Minimum Rating	Required; determines the minimum value that the rating can have for the associated rating type.
Maximum Rating	Required; determines the maximum value that the rating can have for the associated rating type.

- Perform a **Next Block** function to navigate to the Administrator Rating Type Rules block.
- Perform an **Insert Record** function.
- Enter these values.

Field	Value
Effective Term	Defines the term for which this rule becomes effective for the administrator ID and role combination; the rule is effective for this term and all future terms.
Administrator ID	Defines the ID of the administrator to whom this rating type is being assigned. Note: One of the administrative roles assigned to this ID must have the Rater Indicator checkbox checked on the Administrative Role Code Validation Form (STVRADM) for this person to be allowed to enter ratings.

Field	Value
Administrator Role	Defines the role to be associated with the rating type.
Rating Type	Required; identifies what rating type is being associated with this administrator ID and role combination.

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

Creating User-Defined Admissions Ratings

Introduction

User-defined Admissions ratings allow institutions to calculate ratings based on user-defined formulas and insert the ratings into the applicant's SAARRAT record. The formulas are simplified SQL statements that will extract data from Banner fields, calculate a rating, and insert the rating on the Admissions Rating Form (SAARRAT).

Example

Admissions to Banner University is based on an Admissions Index. Applicants must have an index of 55 or higher to be admitted. The index is calculated by multiplying the high school GPA by 10, then adding it to the applicant's ACT composite score.

If the index were put into an equation, it would look like this:

$$(\text{HSGPA} \times 10) + \text{ACT} = \text{Admissions Index}$$

The example has three rating factors:

- high school GPA
- the number 10
- the ACT score

The example has two connectors:

- the 'x' symbol
- the '+' symbol

Building the factors

Use the exercises that follow to build the factors.

Steps - Exercise 1

Follow these steps to define appropriate term rating factors.

1. Access the Admissions Rating Type Rules Form (SAARRCT).
2. Enter the appropriate term in the **Term** field.
3. Perform a **Next Block** function.
4. Enter the term in the **Effective Term** field.
5. Enter *INDEX* in the **Rating Type** field.
6. Enter 0 in the **Minimum Rating** field.
7. Enter 76 in the **Maximum Rating** field.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Steps - Exercise 2

Follow these steps to define each of the rating factors in the equation.

1. Access the Admissions Factor Code Validation Form (STVAFCT).
2. Perform an **Insert Record** function.
3. Enter *MU10* in the **Code** field.
4. Enter a *Multiply by 10* in the **Description** field.
5. Perform an **Insert Record** function.

Note: You can also use the down arrow to access the next blank record.

6. Enter *ACT* in the **Code** field.
7. Enter *ACT* in the **Description** field.
8. Perform an **Insert Record** function.
9. Enter *HSGPA* in the **Code** field.
10. Enter *High School GPA* in the **Description** field.
11. Click the **Save** icon.
12. Click the **Exit** icon.

Steps - Exercise 3

Ratings formulas are simple SQL queries. In the example we are using, the factors are either numbers or data extracted from Banner fields.

Note: If the factor is being extracted from a Banner field, you must know the name of the field. You can look up a field name, by moving your cursor to the appropriate field and selecting *Dynamic Help Query* from the **Help** menu.

Follow these steps to complete the process.

1. Access the Admissions Rating Factor Rules Form (SAARRFT)

Note: The key block of SAARRFT is a query block. Leave everything in the key block blank.

2. Perform a **Next Block** function.
3. Enter the term in the **Term** field.
4. Enter *MU10* in the **Factor** field.
5. Enter *10* in the **Value** field.
6. Click the **Save** icon.
7. Perform an **Insert Record** function.
8. Enter the term in the **Term** field.
9. Enter *ACT* in the **Factor** field.
10. Enter *SORTEST* in the **Table Name** field.
11. Enter *SORTEST_TEST_SCORE* in the **Select Column** field.
12. Enter *SORTEST_TESC_CODE* in the **Where Column** field.
13. Enter *A05* in the **Value** field.
14. Click the **Save** icon.
15. Perform an **Insert Record** function.
16. Enter the term in the **Term** field.
17. Enter *HSGPA* in the **Factor** field.
18. Enter *SORHSCH* in the **Table Name** field.

19. Enter SORHSCH_GPA in the **Select Column** field.
20. Click the **Save** icon.
21. Click the **Exit** icon.

Steps - Exercise 4

The Admissions Rating Formula Definition Form (SAARRDF) is used to connect the factors of the formula. Connectors can be parentheses, the plus sign (+), the minus sign (-), the multiplication symbol (*), and the division symbol (/). Only one item can be entered per row. Sequence numbers are used to determine which row Banner will look at first. Remember the equation we defined earlier? $(HSGPA \times 10) + ACT = \text{Admissions Index}$. Now we will connect the parentheses, the factors, and the mathematical symbols.

Follow these steps to complete the process.

1. Access the Admissions Rating Formula Definition Form (SAARRDF).
2. Enter *INDEX* in the **Rating Type** field.
3. Perform a **Next Block** function.
4. Enter the term in the **Term** field.
5. Enter *1.00* in the **Sequence Number** field.
6. Enter (in the **Left Parenthesis** field.
7. Perform an **Insert Record** function or use the down arrow to access the next line.
8. Enter the term in the **Term** field.
9. Enter *2.00* in the **Sequence Number** field.
10. Enter *HSGPA* in the **Rating Formula Factor Code** field.
11. Perform an **Insert Record** function or use the down arrow to access the next line.
12. Enter the term in the **Term** field.
13. Enter *3.00* in the **Sequence Number** field.
14. Enter * in the **Operator** field.
15. Perform an **Insert Record** function or use the down arrow to access the next

line.

16. Enter the term in the **Term** field.
17. Enter *4.00* in the **Sequence Number** field.
18. Enter *MU10* in the **Factor Code** field.
19. Perform an **Insert Record** function or use the down arrow to access the next line.
20. Enter the term in the **Term** field.
21. Enter *5.00* in the **Sequence Number** field.
22. Enter *)* in the **RParen** field.
23. Perform an **Insert Record** function or use the down arrow to access the next line.
24. Enter the term in the **Term** field.
25. Enter *6.00* in the **Sequence Number** field.
26. Enter *+* in the **Operator** field.
27. Perform an **Insert Record** function or use the down arrow to access the next line.
28. Enter the term in the **Term** field.
29. Enter *7.00* in the **Sequence Number** field.
30. Enter *ACT* in the **Factor Code** field.
31. Click the **Save** icon.

Note: To view the formula, click the **Display Formula** button at the bottom of the form. The formula should display $(HSGPA*10)+ACT$

32. Click the **Exit** icon.

Admissions Rating/Administrator Roles Day-to-Day Operations



Section goal

The purpose of this section is to explain the day-to-day or operational procedures to handle Admissions Rating/Batch Entry Processes at your institution.

Objectives

In this lesson you will learn how to

- assign rating codes
- enter multiple ratings per ID
- group applications and enter decisions
- review rating types and ratings for an ID
- view all applications for a specific date.

Admissions Rating/Administrator Roles Day-to-Day Operations Process Introduction

Introduction

The admissions office is responsible for guiding a student through the admissions process, from application to admission. The admissions rating and batch entry allows users to group applicants together to enter admissions ratings and/or admissions decisions into the system.

The Admissions Rating Form (SAARRAT) allows for the input of multiple ratings (of multiple types), as well as producing total and average ratings by ID. The form also displays basic application information for the applicant being rated.

The Admissions Decision and Rating Batch Entry Form (SAADCBT) allows you to enter an admission decision code for multiple students at one time. In addition, the form allows for the input of multiple ratings for multiple students at one time.

Use the Admission Purge Process (SAPADMS) to purge the new applicant admissions rating data in the SARRRAT table as part of the application record purge.

What happens

The stages of the process are described in this table.

Stage	Description
Admissions	
1	Enters application data
2	Assigns a Rater to the applications
Admissions and/or Rater	
1	Enters Ratings
Admissions	
1	Runs the rating process
2	Applies application decisions

Entering Multiple Ratings per ID

Purpose

Use the Admissions Rating Form (SAARRAT) to enter multiple rating types and associated ratings per individual ID.

Banner form

The screenshot shows the SAARRAT 8.0 (UDCSysT) application window. It contains the following sections:

- Header:** ID: RAT000020, Administrator ID: RAT000020, Term: 200710, Role: RATER.
- Application Summary:** Fields for Entry Term, Application Number, Application Preference, Decision, Admission Type, Student Type, Status, Session, Residence, Application Date, Outstanding Items, and Full or Part Time.
- Application Details:** Priority, Program, Level, College, Campus, Degree, Catalog Term, Field of Study, Type, Code, and Department.
- Application Rating Table:** A table with columns for Administrator ID, Name, Administrator Role, Rating Type, Rating, and User. It contains five empty rows for data entry.
- Summary Statistics:** A note that a rating must be a numeric value between two specified values, and fields for Rating Type Average, Overall Average, Rating Type Total, and Overall Total.

Steps

Follow these steps to complete the process.

1. Access the Admissions Rating Form (SAARRAT).
2. Enter the ID of the applicant who is to be assigned ratings in the **ID** field.

Note: The **Term** field in the key block determines which applications are displayed in the Application Summary block. If a term is entered, then the applications that display begin with that term, sorted in descending order by application number. If no term is entered, then the applications are displayed in descending order by term and then by application number. You may scroll through all the available applications. The rating data entered in the Application Rating block pertains to the application shown in the Application Summary block.

If the **Administrator ID** and **Role** fields are entered in the key block, then all rating types assigned to that administrator ID and role combination on the Admissions Rating Type Rules Form (SAARRCT) are defaulted into the Application Rating block. The administrator ID can also enter additional rating types and ratings as long as they have been defined in the Term Rating Type Rules block on SAARRCT. If the **Administrator ID** field in the key block is left empty, then any rating types/ratings defined on SAARRCT can be entered for this ID.

3. Access the Application Summary block.
4. Access the Application Rating block. Information will default.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Grouping Applications and Entering Decisions

Purpose

Use the Admissions Decision and Rating Batch Entry Form (SAADCBT) to group applications in multiple ways and enter decisions for those groups all at once. In addition, the form allows you to enter ratings for the applications receiving a decision code or to enter only ratings for multiple IDs.

Note: All fields in the Key block are optional. Decision codes can be entered for several applications at once by entering the application decision code in the Key block and then entering the applicant IDs in the Batch Entry block.

Banner form

Key block:

Term: 200710 Decision: [] Administrator ID: [] Role: []
Level: UG Campus: [] College: [] Degree: [] Program: [] Major: []

Application Summary:

Entry Term: [] Decision: [] Status: [] Application Date: []
Application Number: [] Admission Type: [] Session: [] Outstanding Items
Application Preference: [] Student Type: [] Residence: [] Full or Part Time: []

Batch Entry:

ID	Term Code	Application Number	Create Student	Decision Status
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]

Steps

Follow these steps to complete the process

1. Access the Admissions Decision and Rating Batch Entry Form (SAADCBT).
2. Enter the application term of interest in the **Term** field.

Note: All fields in the key block are optional. Term code is required if you are entering batch application decisions.

3. Enter desired decision code in the Decision field or perform a query for available options.
4. Enter the desired codes in the **Administrator ID** and **Role** fields, or perform a query to select an administrator.

Note: The **Administrator ID** and **Role** fields allow you to default the rating types associated with that administrator ID and role combination (from SAARRCT) and its associated rating types (from SAARRCT). This allows institutions to enter ratings scores for the entered IDs at the same time that they enter decision codes. However, ratings can be entered even if no decision code is entered. If no administrator ID or role codes are entered in the key, the Rating Assignments window is still displayed, but those fields [Admin ID, Role, and (Rating) Type] will be empty.

5. Enter additional information as directed by your instructor.

Note: The **Level**, **Campus**, **College**, **Degree**, **Program**, and **Major** fields are not required. If they are entered, then only applications matching those criteria are displayed in the Application Information block.

6. Perform a **Next Block** function to navigate to the Batch Entry block.
7. Enter desired applicant ID or perform a query.

Note: As each ID is entered, the Application Information block displays all applications for that ID for that term.

8. Click the **Save** icon.
9. Add additional IDs to this decision code saving your work each time.
10. Select the Assign Ratings tab.

Note: If an administrator ID code and a role code were entered in the key, then these codes and their associated rating types (from SAARRCT) are displayed in the Rating Assignments window. The rating data entered into the Rating

Assignments window pertains to the ID record noted at the top of the window.

11. Perform an **Insert Record** function to add additional raters, if desired.
12. After you have entered all the rating types and, return to the main window and enter the next ID to receive a decision code and/or ratings.
13. Click the **Save** icon.
14. Click the **Exit** icon.
15. When you have entered all the IDs to receive a decision code and/or ratings, click the **Save** icon.

Note: If a decision code was entered in the Key block, then a decision record for each ID on the form is inserted into the SARAPPD table. The decision code from the Key block will be inserted into SARAPPD_APDC_CODE. The SARADAP_APST_CODE is updated, and the **Maintained by** field (SARAPPD_MAINT_IND) is set to *BATC* for batch decision on the Admissions Decision Form (SAADCRV).

Reviewing Rating Types and Ratings for an ID

Purpose

Use the Rating Review window on the Admissions Decision Form (SAADCRV) to review rating types and ratings for the ID and admissions application in the main window. This window is accessed using the Rating Review tab or by selecting **Rating Review** from the **Options** menu.

Banner form

Admissions Decision SAADCRV 8.0 (UDCSysT)

ID: N00012932 Banks, Dan Term: 200910 Fall 2008

Decision Processing High School Review Prior College and Degree Review Test Score Review

Application Summary

Entry Term: 200910 Decision: Status: C Complete ready Application Date: 13-JAN-2008
 Application Number: 3 Admission Type: ST Standard Session: Outstanding Items
 Application Preference: Student Type: N New First Time Residence: R Resident Full or Part Time:

Priority Program Level College Campus Degree Catalog Term ----- Field of Study -----
 1 BSBA UG BU M BS 200910 Type: MAJOR Code: BUSI Department:

Application Decision Application Decision Letter Decision Calculator Rating Review

Decision Data

Decision Code	Description	Significant Decision	Institution Acceptance	Applicant Acceptance	Institution Rejection	Inactive Application	Maintained by	Decision Date	User ID
<input type="checkbox"/>		<input type="checkbox"/>							
<input type="checkbox"/>		<input type="checkbox"/>							
<input type="checkbox"/>		<input type="checkbox"/>							
<input type="checkbox"/>		<input type="checkbox"/>							
<input type="checkbox"/>		<input type="checkbox"/>							

Steps

Follow these steps to complete the process.

1. Access the Admissions Decision Form (SAADCRV).
2. Enter the ID of the record you would like to review in the **ID** field.
3. Access the Application Summary block.
4. Select the **Decision Calculator** tab.
5. Access the **Select** field.
6. Select the **Rating Review** tab.
7. Review the information.
8. Click the **Exit** icon.

Viewing All Applications for a Specific Date

Purpose

The Rating Audit Report (SARDCBT) shows all applications updated by the Admissions Decision and Rating Batch Entry Form (SAADCBT) for a specific date. The report displays this data for IDs matching these input parameters:

- ID/SSN
- Name
- High School
- Term Code
- Application Number
- Application Type
- Level
- Campus
- Degree
- Major
- Program
- Subtotal of # of decisions for that particular decision code

In addition, the control section at the end of the report details the parameters that were entered. The control section also indicates the total number of decisions (matching the input parameters) entered on that date.

Banner process

Process Submission Controls GJAPCTL 8.0 (UDCSysT)

Process: SARDCBT Rating Audit Report Parameter Set: []

Printer Control

Printer: DATABASE Special Print: [] Lines: [] Submit Time: []

Parameter Values

Number	Parameters	Values
01	Term Code	[]
02	Decision Date From	[]
03	Decision Date To	[]
04	Decision Code	[]
05	Level Code	[]
06	Campus Code	[]
07	Degree Code	[]
08	Program	[]

LENGTH: 6 TYPE: Character O/R: Required M/S: Single
Enter Term Code

Submission

Save Parameter Set as Name: [] Description: [] Hold Submit

Steps

Follow these steps to complete the process.

1. Access the Rating Audit Form (SARDCBT).
2. Enter the destination printer in the **Printer** field.
3. Perform a **Next Block** function.
4. Enter these (optional) parameters.

Parameter	Value
Term Code	Term of the applications that have been given ratings or decisions that you would like to review, values from STVTERM
Decision Date From	DD-MON-YYYY format, decision date (beginning of range) from which you wish to see records with updated decision codes
Decision Date To	DD-MON-YYYY format, decision date (end of range) by which you wish to see records with updated decision codes
Decision Code	Decision code for applications that have been updated on SAADCBT, values from STVAPDC
Level Code	Level code for applications that have been updated on SAADCBT, values from STVLEVEL
Campus Code	Campus code for applications that have been updated on SAADCBT, values from STVCAMP
Degree Code	Degree code for applications that have been updated on SAADCBT, values from STVDEGC
Program	Program code for applications that have been updated on SAADCBT, values from SMAPRLE
Major Code	Major code for applications that have been updated on SAADCBT, values from STVMAJR

5. Access the **Submission** block.
6. If you would like to save your parameters, check the **Save Parameter Set as**

checkbox and enter a name and description for your parameter set in **Name** and **Description** fields.

7. Select the **Submit** radio button if you want the report to run immediately or select the **Hold** radio button to run the report at a later date.
8. Click the **Save** icon to run the process.
9. Select **Review Output** from the **Option** menu to review the results.
10. Click the **Exit** icon.

Calculating Admissions Ratings

Introduction

The Admission Rating Calculation Report (SARRATE) calculates admissions ratings using the user-defined formula built on SAARRDF and adds the ratings to applicant records on SAARRAT.

Banner process

The screenshot shows a web-based interface for the SARRATE process. At the top, the window title is "Process Submission Controls GIAPCTL 8.0 (UDCSyst)". Below the title bar, there are two dropdown menus: "Process:" set to "SARRATE" and "Admission Rating Calculation", and "Parameter Set:" which is currently empty. A yellow horizontal line separates this from the "Printer Control" section. In the "Printer Control" section, there is a "Printer:" dropdown set to "DATABASE", a "Special Print:" text box, "Lines:" set to "55", and a "Submit Time:" text box. Another yellow horizontal line follows. The "Parameter Values" section contains a table with two columns: "Number" and "Parameters" (with a dropdown arrow), and "Values" (with a dropdown arrow). The table lists eight parameters: 01 Term, 02 Recalculate existing ratings, 03 Applicant ID, 04 Application ID, 05 Selection ID, 06 Creator ID, 07 Administrator ID, and 08 Rating type. The "Values" column shows "N" for parameter 02. Below the table, it specifies "LENGTH: 6 TYPE: Character O/R: Required M/S: Single" and "Term code.". A final yellow horizontal line separates this from the "Submission" section. In the "Submission" section, there is a checkbox for "Save Parameter Set as", "Name:" and "Description:" text boxes, and radio buttons for "Hold" and "Submit".

Number	Parameters	Values
01	Term	
02	Recalculate existing ratings	N
03	Applicant ID	
04	Application ID	
05	Selection ID	
06	Creator ID	
07	Administrator ID	
08	Rating type	

Steps

Follow these steps to complete the process.

1. Access the Admission Rating Calculation Report (SARRATE).
2. Perform a **Next Block** function.
3. Enter the appropriate printer code in the **Printer** field.
4. Perform a **Next Block** function.
5. Enter the term code in the **Term** parameter (Parameter 1).
6. Enter *N* in the **Recalculate existing ratings** parameter (Parameter 2).

Note: Parameters 3-6 are optional.
7. Enter the appropriate Administrator ID number in the **Administrator ID** parameter (Parameter 7).
8. Enter *INDEX* in the **Rating type** parameter (Parameter 8).
9. Enter *RATER* in the **Role for Administrator ID** parameter (Parameter 9).
10. Enter *C* in the **Application status** parameter (Parameter 10).
11. Enter yesterday's date in the **App status begin date** parameter (Parameter 11).
12. Enter tomorrow's date in the **App status end date** parameter (Parameter 12).
13. Enter *TAPE* in the **Valid test source for formula** parameter (Parameter 13).
14. Enter *U* for update in the **Run mode** parameter (Parameter 14).
15. Enter *D* for detailed in the **Report type** Parameter (Parameter 15).
16. Perform a **Next Block** function.
17. Click the **Submit** button, if necessary.
18. Click the **Save** icon.
19. Review your output.

Steps

Follow these steps to add ID numbers and verify INDEX ratings.

1. Access the Admissions Rating Form (SAARRAT)
2. Enter one of the ID numbers that appears on the SARRATE report in the key block.
3. Perform a **Next Block** function.
4. Verify that the INDEX rating was added.
5. Click the **Exit** icon.

Self Check

Directions

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

Question 1

The Admissions Decision and Rating Batch Entry Form (SAADCBT) allows you to do what two things?

Question 2

What field on the Administrator Role Code Validation Form (STVRADM) must be entered in order for an administrator to enter ratings?

Question 3

What form is used for entering multiple ratings for an individual ID?

Answer Key for Self Check

Question 1

The Admissions Decision and Rating Batch Entry Form (SAADCBT) allows you to do what two things?

1)Enter admissions decisions for multiple students at one time

2)Enter multiple ratings for multiple students at one time

Question 2

What field on the Administrator Role Code Validation Form (STVRADM) must be entered in order for an administrator to enter ratings?

Rater indicator box must be checked

Question 3

What form is used for entering multiple ratings for an individual ID?

The Admissions Rating Form (SAARRAT)

Regionalization Introduction



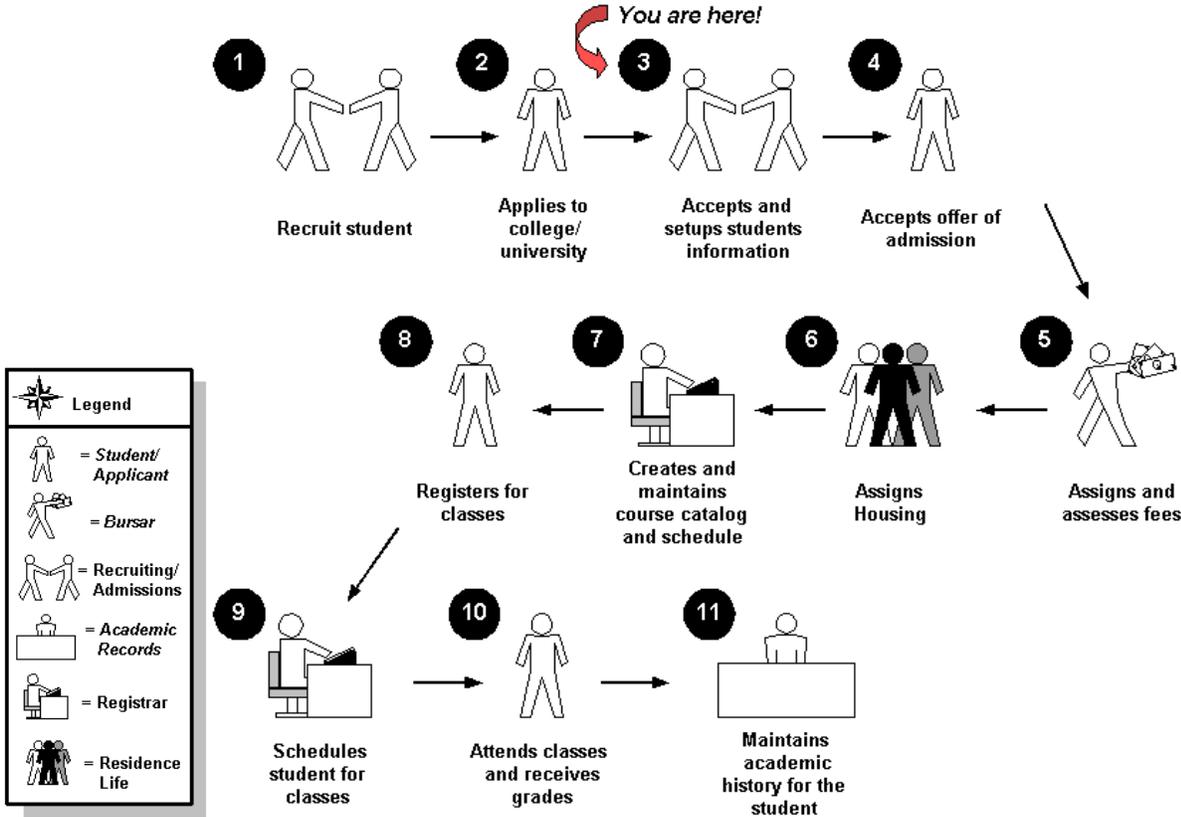
Regionalization Process Introduction

Introduction

Regionalization is used to assign people and institutions to various geographic regions. The geographic regions of individuals and institutions and institutional Enrollment Planning Services (EPS) Market Codes can be used when creating the rules for material creation. Historical data on which region(s) a person or institution has belonged to is maintained.

Flow diagram

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



About the process

- Rule and validation forms are set up on the Banner system. Unless a new code is required, this step is only performed once.
- The person/employee will view, save, and print online output.
- Parameters validation criteria will be defined.

Regionalization Set Up



Section goal

The purpose of this section is to outline the set-up process and detail the procedures to set-up your Banner system to assign regions and administrators to individuals and institutions for marketing purposes.

Objectives

In this lesson you will learn how to

- identify and describe all Banner forms and processes that will be affected by the Regionalization process
- create the rules and set parameters used to process Regionalization data.

Rule and Validation Forms That Control Regionalization

Introduction

Before regionalization tracking can be done in Banner, there are several forms and rules that need to be set or created.

Rule and validation forms

These forms are used to set the rules and parameters in Banner for handling Regionalization and Administrator Assignments

Review the forms listed here. Some of these forms may be previously established through other systems (HR, Alumni, etc.). Review these forms to see how they relate to the Regionalization views and reports

Directions on how to set the parameters start on the next page.

Form Description	Banner Name
Geographic Regions/Divisions by ID	GOAPGEO
Source/Background Institution Geographic	GOASGEO
Administrator Role Rules	SOAADAS
Administrator Assignments	SOAINF
Administrator Role	SOAROL
Enrollment Planning Service Rules	SPAEPSC
Geographic Region Rules	SOAGEOR
Administrator Assignment Data Element Validation	STVADDA
Enrollment Planning Service Code Validation	STVEPSC

Form Description	Banner Name
Geographic Region Division Codes Validation	STVGEOB
Geographic Region Codes Validation	STVGEOR

Geographic Regions/Divisions by ID

Banner form

Geographic Regions/Divisions by ID (GOAPGEO)

Geographic Regions/Divisions by ID GOAPGEO 8.0 (UDCSysT)

ID: RAT000020 Della Armstrong

Region: AIRPRT-ATL Atlanta Airport Area Alt	Division: ALUM Office of Alumni Relatio
Region From Date: 01-DEC-2006	Region To Date: <input type="text"/> <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> System
Address Type: MA Sequence Number: 1	From Date: 01-DEC-2006 To Date: <input type="text"/> Status: <input type="checkbox"/>
Street: 234 Peachtree Road	City: Atlanta
State: GA ZIP/PC: 30310	County: <input type="text"/> Nation: <input type="text"/>
Region: REC3 Admissions Recruiter 3	Division: UGRECRUIT UG Recruiting
Region From Date: 01-DEC-2006	Region To Date: <input type="text"/> <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> System
Address Type: MA Sequence Number: 1	From Date: 01-DEC-2006 To Date: <input type="text"/> Status: <input type="checkbox"/>
Street: 234 Peachtree Road	City: Atlanta
State: GA ZIP/PC: 30310	County: <input type="text"/> Nation: <input type="text"/>
Region: SOUTHEAST	Division: DEVEL Development Office
Region From Date: 01-DEC-2006 Southeastern United S	Region To Date: <input type="text"/> <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> System
Address Type: MA Sequence Number: 1	From Date: 01-DEC-2006 To Date: <input type="text"/> Status: <input type="checkbox"/>
Street: 234 Peachtree Road	City: Atlanta
State: GA ZIP/PC: 30310	County: <input type="text"/> Nation: <input type="text"/>

Source/Background Institution Geographic

Banner form

Source/Background Institution Geographic (GOASGEO)

Source/Background Institution:

Source/Background Institution Address Information

Address:

City:

State/Prov:

ZIP/PC:

County:

Nation:

Source/Background Institution Geographic Assignments

Region	Description	Division	Description	Active	System Indicator
<input type="text"/>		<input type="text"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>

Administrator Role Rules

Banner form

Administrator Role Rules (SOAADAS)

Administrator Role Rules SOAADAS 8.0 (UDCSysT)

ID: Role: Effective Term: Active Only

Rule Definitions

Active	Rule	Effective Term	Description	Role	Description
<input checked="" type="checkbox"/>	1	200210	Fall 2001	RATER	Application Desc Rater
<input checked="" type="checkbox"/>	2	200210	Fall 2001	RECRUITER	Assigned Recruiter
<input checked="" type="checkbox"/>	3	200510	Fall 2004	READER	Application Reader
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Assignment Rules

Rule	Data Element	Operator	From Value	To Value
1	SARADAP_LEVL_CODE	=	UG	
	SARADAP_MAJR_CODE_1	=	ECON	

Administrator Assignments

Banner form

Administrator Assignments (SOAAINF)

Administrators Assignments SOAAINF 8.0 (UDCSysT)

ID: Role: Term:

Term	Role	Module	ID	Name	Sequence	Source
200310	RATER	A	458664611	Adams, Carol	1	S
200310	RATER	A	990664600	Blabbs, Kathy	2	S
200310	RATER	A	N88664609	Colby, Sandra	1	S
200310	RATER	A	786243659	Connors, Stephanie	1	S
200310	RATER	A	988664596	Cunningham, Randall	2	S
200310	RATER	A	988664598	Dangers, John	2	S
200310	RATER	A	N88664605	Edwards, John	1	S
200310	RATER	A	N88664651	Fitzgerald, Clifford	1	S
200310	RATER	A	908664602	Gelton, Tom	1	S
200310	RATER	A	098664599	Higgins, Henry	2	S
200310	RATER	A	88664613	Hudson, Paula	1	S
200310	RATER	A	088664614	James, Robert	1	S
200310	RATER	A	788664603	Jenkins, Henrietta	1	S
200310	RATER	A	288664644	Mayfield, Bridget	1	S
200310	RATER	A	288664645	Mayfield, Robert	1	S
200310	RATER	A	N88664642	Murphy, Hope	1	S
200310	RATER	A	N88664604	Queenan, Sophia	1	S
200310	RATER	A	N88664650	Reese, Della	1	S
200310	RATER	A	N88664649	Regina, Ann	1	S
200310	RATER	A	N88664648	Regina, Sarah	1	S

Administrator Role

Banner form

Administrator Role (SOAAROL)

Role	Description	Activity Date
<input type="text" value="RATER"/>	Application Desc Rater	29-APR-2002
<input type="text" value="READER"/>	Application Reader	29-APR-2002
<input type="text" value="RECRUITER"/>	Assigned Recruiter	29-APR-2002
<input type="text"/>		

Enrollment Planning Service Rules

Banner form

Enrollment Planning Service Rules (SOAEPSC)

The screenshot shows a web browser window titled "Enrollment Planning Service Rules SOAEPSC 8.0 (UDCSys)". The form contains the following elements:

- Enrollment Planning Service Code:** A dropdown menu with a small square icon to its right.
- State/Province Code:** A dropdown menu with a small square icon to its right, followed by five empty text input boxes stacked vertically.
- ZIP/Postal Code:** A dropdown menu with a small square icon to its right, followed by five empty text input boxes stacked vertically.
- County Code:** A dropdown menu with a small square icon to its right, followed by five empty text input boxes stacked vertically.
- City:** Four empty text input boxes stacked vertically.

Geographic Region Rules

Banner form

Geographic Region Rules (SOAGEOR)

Geographic Region Rules SOAGEOR 8.0 (UDCSysT)

Region: ▼

Division: ▼

Type	Value A ▼	Value B ▼
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Administrator Assignment Data Element Validation Form

Banner form

Administrator Assignment Data Element Validation Form (STVADDA)

Base Table	Data Element	Description	Validation Table	Sys Req	Activity Date
GORPGEO	GORPGEO_GEOD_CODE	Person Geod Code	STVGEOD	<input checked="" type="checkbox"/>	08-FEB-2000
GORPGEO	GORPGEO_GEOR_CODE	Person Geor Code	STVGEOR	<input checked="" type="checkbox"/>	08-FEB-2000
GORVISA	GORVISA_VTYP_CODE	Visa - Current	STVVVYP	<input checked="" type="checkbox"/>	14-OCT-2002
SARAATT	SARAATT_ATTTS_CODE	Applicant Attribute Code	STVATTTS	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_ADMT_CODE	App Admit Code	STVADMT	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_CAMP_CODE	App Camp Code	STVCAMP	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_COLL_CODE_1	App Coll Code	STV COLL	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_DEGC_CODE_1	App Degree Code	STVDEGC	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_DEPT_CODE	App Dept Code	STVDEPT	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_FULL_PART_IND	App Full/Part Time Ind		<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_LEVL_CODE	App Level Code	STVLEVL	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_LFST_CODE_1	App 1st curric LFST Code	GTVLFST	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP	SARADAP_MAJR_CODE_1	App Major Code	STVMAJR	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_PROGRAM_1	App Program	SMRPRLE	<input checked="" type="checkbox"/>	14-OCT-2002
SARADAP	SARADAP_RESD_CODE	App Residence Code	STVRESD	<input checked="" type="checkbox"/>	14-OCT-2002
SARADAP	SARADAP_RTYP_CODE	App Recruit Type Code	STVRTYP	<input checked="" type="checkbox"/>	14-OCT-2002
SARADAP	SARADAP_STYP_CODE	App Student Type Code	STVSTYP	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_TERM_CODE_ENTR	Recruit Term code	STVTERM	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP2	SARADAP_CAMP_CODE_2	App 2nd Curric Camp Code	STVCAMP	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP2	SARADAP_COLL_CODE_2	App 2nd Curric Coll Code	STV COLL	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP2	SARADAP_DEGC_CODE_2	App 2nd Curr Degree Code	STVDEGC	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP2	SARADAP_DEPT_CODE_2	App 2nd Curr Dept Code	STVDEPT	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP2	SARADAP_LEVL_CODE_2	App 2nd Curr Level Code	STVLEVL	<input checked="" type="checkbox"/>	10-JUN-2006

Enrollment Planning Service Code Validation Form

Banner form

Enrollment Planning Service Code Validation Form (STVEPSC)

Enrollment Planning Service Code Validation STVEPSC 8.0 (UDCSysT)

Code	Description	Activity Date
IL	Illinois	02-DEC-2004
IN	Indiana	02-DEC-2004
IN03	South Bend	12-SEP-2006
IN05	Lafayette	12-SEP-2006
IVHOUS	IV Houston	20-OCT-2005
KY	Kentucky	02-DEC-2004
NAMT	National Merit Territory	12-SEP-2006
NY	New York	02-DEC-2004
OH	Ohio	02-DEC-2004
OH0001	Central Ohio	10-JUN-2004
PA	Pennsylvania	02-DEC-2004
TARRAN	Tarrant County	17-OCT-2005

Geographic Region Division Codes Validation Form

Banner form

Geographic Region Division Codes Validation Form (STVGEOD)

Geographic Region Division Code Validation STVGEOD 8.0 (UDCSysT)		
Code	Description	Activity Date
ALUM	Office of Alumni Relations	01-MAR-2004
ALURECRUIT	Alumni Recruitment	27-APR-1995
CENTRAL	Central	09-JAN-2008
CHAMBER	Chamberlain College of Nursing	09-JAN-2008
CONTINUED	Continuing Education Division	27-APR-1995
DEVEL	Development Office	27-APR-1995
EAST	East	09-JAN-2008
FINAID	Financial Aid Office	07-OCT-2005
GRADUATE	Graduate Admissions	27-APR-1995
GRRECRUIT	GR Recruiting	29-APR-2003
INST/ADV	Institutional Advancement	27-APR-1995
INTL	International	09-JAN-2008
MDRECRUIT	Med Recruiting	29-APR-2003
ONLINE	Online	09-JAN-2008
PRES	Presidents Office	27-APR-1995
RECRUITS	Recruits	02-DEC-2004
UGRECRUIT	UG Recruiting	29-APR-2003
UNDERGRAD	Undergraduate Admissions	27-APR-1995
WEST	West	09-JAN-2008

Geographic Region Codes Validation Form

Banner form

Geographic Region Codes Validation From (STVGEOR)

Code	Description	Activity Date
AC-DENVER	Denver Area Alumni Chapter	12-JUL-2005
AC-ENCENTL	East North Central Alumni Club	26-FEB-2007
AC-NYC	New York Area Alumni Club	01-MAR-2004
AC-PHILLY	Philly Area Alumni Chapter	01-MAR-2004
AC-WNCENTL	West North Central Alumni Club	26-FEB-2007
AIRPRT-ATL	Atlanta Airport Area Alumni	01-MAR-2004
AUS	Australian State/Territory	08-OCT-2007
BALT/WASH	Baltimore/Washington Area	27-APR-1995
BRENT	Brent Johnson	02-DEC-2004
CENTRAL	Central	09-JAN-2008
CHAMBER1	Chamberlain Location 1	09-JAN-2008
CHAMBER2	Chamberlain location 2	09-JAN-2008
CHAMBERV	Chamberlain On line	09-JAN-2008
CHICAGO	Chicago Metro Area	16-APR-1998
CLEVELAND	Cleveland Metro/Burbs Area	12-JUL-2005
DALLAREA	Dallas Area	17-OCT-2005
EAST	East	09-JAN-2008
FLORIDA	Florida Alumni	10-OCT-2005
HK	Hong Kong	08-OCT-2007
HOUSTON	Houston Area	07-OCT-2005
IN03	South Bend, Indiana	12-SEP-2006
IN05	Lafayette, Indiana	12-SEP-2006

Defining Data Elements

Purpose

The Administrator Assignment Data Element Validation Form (STVADDA) is used to define the various data elements that may be used to assign administrators on the Administrator Role Rules Form (SOAADAS). The data for this table is provided by SunGard Higher Education. Programming logic is built into each of the delivered data elements.

Note: If new data elements are needed, they will be inserted into this table, and the stored Steps to calculate the assignments will be modified to include the new data elements.

Note: The **Sys(tem) Req(quired)** checkbox is used to determine what values are required by the system. If the **Sys(tem) Req(quired)** checkbox is checked, the validation table record cannot be deleted. New Codes that are added to the table DO NOT need to be marked as Sys(tem) Req(quired).

Banner form

Base Table	Data Element	Description	Validation Table	Sys Req	Activity Date
GORPGEO	GORPGEO_GEOD_CODE	Person Geod Code	STVGEOD	<input checked="" type="checkbox"/>	08-FEB-2000
GORPGEO	GORPGEO_GEOR_CODE	Person Geor Code	STVGEOR	<input checked="" type="checkbox"/>	08-FEB-2000
GORVISA	GORVISA_VTYP_CODE	Visa - Current	STVVVYP	<input checked="" type="checkbox"/>	14-OCT-2002
SARAATT	SARAATT_ATTTS_CODE	Applicant Attribute Code	STVATTS	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_ADMT_CODE	App Admit Code	STVADMT	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_CAMP_CODE	App Camp Code	STVCAMP	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_COLL_CODE_1	App Coll Code	STVCOLL	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_DEGC_CODE_1	App Degree Code	STVDEGC	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_DEPT_CODE	App Dept Code	STVDEPT	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_FULL_PART_IND	App Full/Part Time Ind		<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_LEVL_CODE	App Level Code	STVLEVL	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_LFST_CODE_1	App 1st curric LFST Code	GTVLFST	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP	SARADAP_MAJR_CODE_1	App Major Code	STVMAJR	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_PROGRAM_1	App Program	SMRPRLE	<input checked="" type="checkbox"/>	14-OCT-2002
SARADAP	SARADAP_RESD_CODE	App Residence Code	STVRESD	<input checked="" type="checkbox"/>	14-OCT-2002
SARADAP	SARADAP_RTYP_CODE	App Recruit Type Code	STVRTYP	<input checked="" type="checkbox"/>	14-OCT-2002
SARADAP	SARADAP_STYP_CODE	App Student Type Code	STVSTYP	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP	SARADAP_TERM_CODE_ENTR	Recruit Term code	STVTERM	<input checked="" type="checkbox"/>	08-FEB-2000
SARADAP2	SARADAP_CAMP_CODE_2	App 2nd Curric Camp Code	STVCAMP	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP2	SARADAP_COLL_CODE_2	App 2nd Curric Coll Code	STVCOLL	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP2	SARADAP_DEGC_CODE_2	App 2nd Curr Degree Code	STVDEGC	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP2	SARADAP_DEPT_CODE_2	App 2nd Curr Dept Code	STVDEPT	<input checked="" type="checkbox"/>	10-JUN-2006
SARADAP2	SARADAP_LEVL_CODE_2	App 2nd Curr Level Code	STVLEVL	<input checked="" type="checkbox"/>	10-JUN-2006

Steps

Follow these steps to complete the process.

1. Access the Administrator Assignment Data Element Validation Form (STVADDA).
2. Enter a value in the **Base Table** field.
3. Enter a value in the **Data Element** field.
4. Enter a description in the **Description** field.
5. Enter a value in the **Validation Table** field.
6. Check the **Sys(tem) Req(uires)** checkbox, if necessary.
7. Click the **Save** icon.

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

8. Click the **Exit** icon.

Defining Rules for Different Administrators

Purpose

The Administrator Role Rules Form (SOAADAS) allows you to define a combination of rules to be used in assigning different administrators (e.g., recruiter, reader, alumni recruiter) to high school and person records.

The form allows institutions to use many fields available within Banner to determine how a specific administrative role should be assigned. Examples of fields that are included are: college code, campus, level, geographic region code, high school code, degree, program, ethnicity, and gender.

Note: The fields that are available have been predefined in the Administrator Assignment Data Element Validation Form (STVADDA). The logic is an OR condition within like data elements and an AND condition between different data elements. If more than one rule ID exists for an administrator/role combination, OR logic is used between the rules.

The form can be entered in query mode, allowing you to see what rules have been defined for the administrator ID in the key. If the role is entered in the key, only rules matching this field are displayed. If an eff(ective) term is entered in the key, all rules for that effective term and earlier are displayed.

If the **Active** checkbox is checked, only active rules for this administrator ID are displayed.

Banner form

Administrator Role Rules SOAADAS 8.0 (UDCSysT)

ID: RAT000020 Armstrong, Della Role: Effective Term: Active Only

Rule Definitions

Active	Rule	Effective Term	Description	Role	Description
<input checked="" type="checkbox"/>	1	200210	Fall 2001	RATER	Application Desc Rater
<input checked="" type="checkbox"/>	2	200210	Fall 2001	RECRUITER	Assigned Recruiter
<input checked="" type="checkbox"/>	3	200510	Fall 2004	READER	Application Reader
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Assignment Rules

Rule	Data Element	Operator	From Value	To Value
1	SARADAP_LEVEL_CODE	=	UG	
	SARADAP_MAJR_CODE_1	=	ECON	

Steps

Follow these steps to complete the process.

1. Access the Administrator Role Rules Form (SOAADAS).
2. Enter the administrator In the **ID** field.

Note: You can click the down arrow next to the **ID** field and select the *Admin Assign Search Form* option to query existing administrators. Or, select the *Person Search Form* to select a new administrator.

Note: If the **Active Only** checkbox is checked, only active rules for an administrator ID are displayed.

3. Enter a term in the **Effective Term** field.
4. Perform a **Next Block** function to navigate to the Rule Definitions block.
5. To create a new rule for the administrator ID, enter the appropriate effective term and role for the new rule in the **Effective Term** field.

Note: The system automatically creates the rule number once the new rule assignments have been saved.

6. Click the **Save** icon.
7. Perform a **Next Block** function to access the Assignment Rules block, and define the specific elements that govern the new rule.
8. Click the down arrow above the **Data Element** field to view the List of Values.
9. Select a code.
10. Click **OK**.

Note: The fields that are available have been predefined in the Administrator Assignment Data Element Validation Form (STVADDA). The logic is an OR condition within like data elements and an AND condition between different data elements. If more than one rule ID exists for an administrator/role combination, OR logic is used between the rules.

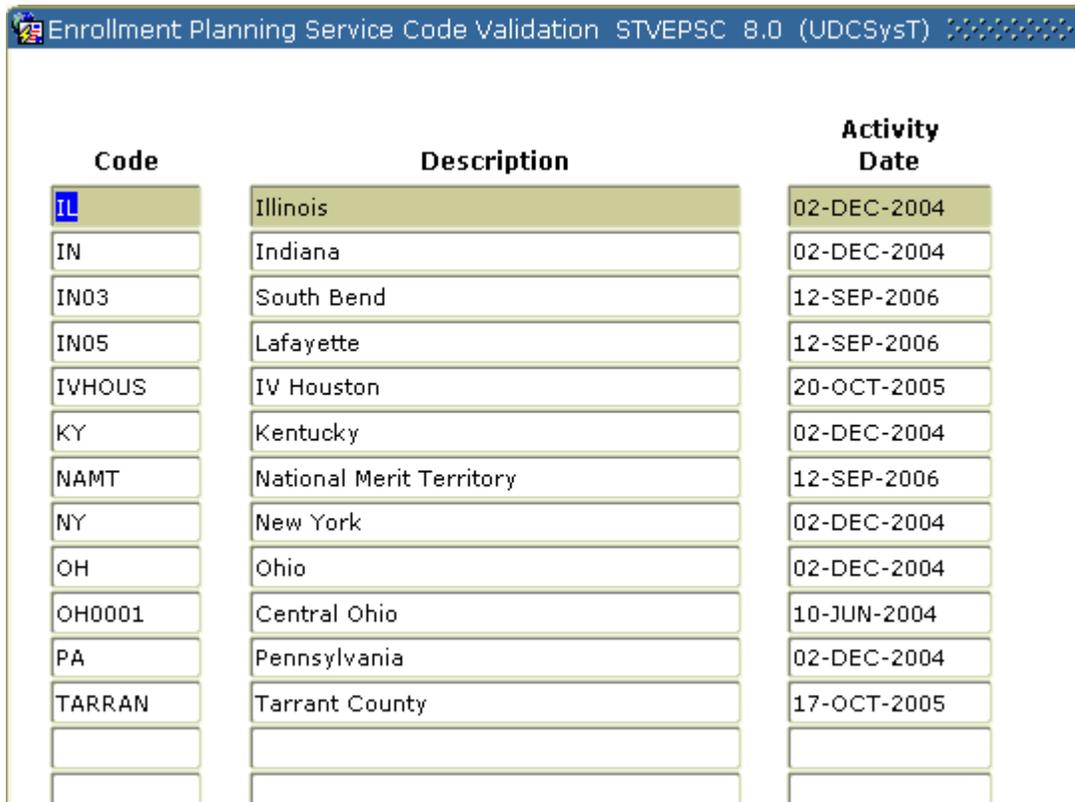
11. The **Operator** field can be set to either = (equal) or <> (not equal).
12. Double-click in the **From Value** field to view the List of Values to assign the appropriate value for the corresponding data element. You may designate a range of values for a data element using the List of Values from the **To Value** field, for example a ZIP Code range of 06000 to 06599.
13. Click the **Save** icon.
14. Click the **Exit** icon.

Entering Enrollment Planning Service Market Codes

Purpose

The Enrollment Planning Service Code Validation Form (STVEPSC) can contain all 304 Enrollment Planning Service (DPS) Market codes created by the College Board along with their corresponding market names. This validation form must be populated by the institution with all the EPS codes and descriptions available from the College Board.

Banner form



Code	Description	Activity Date
IL	Illinois	02-DEC-2004
IN	Indiana	02-DEC-2004
IN03	South Bend	12-SEP-2006
IN05	Lafayette	12-SEP-2006
IVHOUS	IV Houston	20-OCT-2005
KY	Kentucky	02-DEC-2004
NAMT	National Merit Territory	12-SEP-2006
NY	New York	02-DEC-2004
OH	Ohio	02-DEC-2004
OH0001	Central Ohio	10-JUN-2004
PA	Pennsylvania	02-DEC-2004
TARRAN	Tarrant County	17-OCT-2005

Steps

Follow these steps to complete the process.

1. Access the Enrollment Planning Service Code Validation From (STVEPSC).
2. Enter a code in the **Code** field.
3. Enter a description In the **Description** field.
4. Click the **Save** icon.

Note: The **Activity Date** field defaults.

5. Click the **Exit** icon.

Setting Up Rules for EPS Codes

Purpose

The Enrollment Planning Services Rules Form (SOAEPSC) allows you to set up rules for each EPS code by state, ZIP/PC, county, or city. Only the State/Prov field is required. These rules are for specific region criteria and apply only to high school addresses.

Banner form

Enrollment Planning Service Rules SOAEPSC 8.0 (UDCSysT)

Enrollment Planning Service Code: ▼

State/Province Code	ZIP/Postal Code	County Code	City
▼ <input type="text"/>	▼ <input type="text"/>	▼ <input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Steps

Follow these steps to complete the process.

1. Access the Enrollment Planning Services Rules Form (SOAEPSC).
2. Click the down arrow next to the **Enrollment Planning Service Code** field.
3. Select a region.
4. Click **OK**.
5. Perform a **Next Block** function.
Result: Information defaults.
6. Change any information as necessary.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Regionalization Day-to-Day Operations



Section goal

The purpose of this section is to explain the day-to-day or operational procedures to handle selective admissions at your institution.

Objectives

In this lesson you will learn how to

- assign a student to an administrator
- display administrative roles
- assign geographic regions to an ID
- assign administrators to recruit and applicant records
- assign regions to individuals and to high schools

Regionalization Day-to-Day Operations Process

Introduction

Introduction

The admissions office is responsible for guiding a student through the admissions process, from application to admission. Regionalization is used to assign people and institutions to various geographic regions for assigning of administrators.

What happens

The stages of the process are described in this table.

Stage	Regionalization
Recruiting and/or Admissions	
1	Develops geographic regions
2	Assigns administrators to geographic regions
3	Develops communication plans based on regions
4	Assigns regions and administrators to Applicants

Assigning a Recruit/Applicant/Student to an Administrator

Purpose

The Administrators Assignments Form (SOAAINF) displays the IDs and names of everyone assigned to the administrator/ role combination identified in the key information.

For example, if Russell Jones is a recruiter for University and using the Administrator Role Rules Form (SOAADAS) he was assigned as the recruiter for all high schools in Michigan, then SOAAINF would display all IDs having recruiting records that had been entered into Banner for a specific term and that had associated high schools with an address in Michigan. The form obtains this information by querying the SORAROL table for the administrator ID, role, and term in the key.

Note: Use the *Remember ID* option to carry one of the IDs to another form.

Banner form

Administrators Assignments SOAAINF 8.0 (UDCSysT)

ID: Role: Term:

Term	Role	Module	ID	Name	Sequence	Source
200310	RATER	A	458664611	Adams, Carol	1	S
200310	RATER	A	990664600	Blabbs, Kathy	2	S
200310	RATER	A	N88664609	Colby, Sandra	1	S
200310	RATER	A	786243659	Connors, Stephanie	1	S
200310	RATER	A	988664596	Cunningham, Randall	2	S
200310	RATER	A	988664598	Dangers, John	2	S
200310	RATER	A	N88664605	Edwards, John	1	S
200310	RATER	A	N88664651	Fitzgerald, Clifford	1	S
200310	RATER	A	908664602	Gelton, Tom	1	S
200310	RATER	A	098664599	Higgins, Henry	2	S
200310	RATER	A	88664613	Hudson, Paula	1	S
200310	RATER	A	088664614	James, Robert	1	S
200310	RATER	A	788664603	Jenkins, Henrietta	1	S
200310	RATER	A	288664644	Mayfield, Bridget	1	S
200310	RATER	A	288664645	Mayfield, Robert	1	S
200310	RATER	A	N88664642	Murphy, Hope	1	S
200310	RATER	A	N88664604	Queenan, Sophia	1	S
200310	RATER	A	N88664650	Reese, Della	1	S
200310	RATER	A	N88664649	Regina, Ann	1	S
200310	RATER	A	N88664648	Regina, Sarah	1	S

Steps

Follow these steps to complete the process.

1. Access the Administrator's Assignments Form (SOAAINF).
2. Enter the **ID** of the administrator.
Enter the appropriate codes in the **Role** and the **Term** fields.
3. Perform a **Next Block** function.
4. Perform an **Insert Record** function, or navigate to a new row.
5. Select the *Assign Student* option in the **Options** menu.
6. Enter the ID of a student in the **ID** field. T

Result: This will assign the student to that administrator.

7. Enter values in these fields:

Module

Term and Sequence

Role

8. Click the **Save** icon.
9. Assign additional students as desired, saving your work after each entry.
10. Click the **Exit** icon.

Displaying Administrative Roles

Purpose

The Administrator Role Form (SOAAROL) is used to display all the administrative roles assigned to the ID in the key information. Because individuals can hold more than one type of administrative role, this form allows you to see all the roles that have been assigned to different individuals.

Note: Remember to assign administrator roles, use the Administrator Role Rules Form (SOAADAS).

Banner form

The screenshot shows the SOAAROL 8.0 (UDCSysT) form. At the top, the title bar reads "Administrator Role SOAAROL 8.0 (UDCSysT)". Below the title bar, the "ID:" field contains "RAT000020" and a dropdown menu shows "Armstrong, Della". A horizontal yellow line separates the header from the table below.

Role	Description	Activity Date
<input type="button" value="RATER"/>	Application Desc Rater	29-APR-2002
<input type="button" value="READER"/>	Application Reader	29-APR-2002
<input type="button" value="RECRUITER"/>	Assigned Recruiter	29-APR-2002
<input type="button" value=""/>		
<input type="button" value=""/>		

Steps

Follow these steps to complete the process.

1. Access the Administrator Role Form (SOAAROL).
2. Enter the ID of the administrator in the **ID** field.

Note: If you do not know the ID of the administrator click the down arrow next to the **ID** field to access the Option List. Select *Admin Assign Search Form*, and perform your query.

3. Perform a **Next Block** function to view the roles assigned.
4. Click the **Exit** icon.

Assigning Geographic Regions to an ID

Purpose

The Geographic Regions/Divisions by ID Form (GOAPGEO) is used to display the geographic regions assigned to an ID based on its addresses. Regions can be active or inactive. A record with the **System** checkbox checked could be made inactive, but no other fields can be altered. If the user enters a record, the **System** checkbox remains unchecked.

Banner form

The screenshot shows the Banner Geographic Regions/Divisions by ID form (GOAPGEO 8.0) for ID RAT000020, Della Armstrong. The form displays two records with the following details:

Record	Region	Division	Region From Date	Region To Date	Active	System
1	AIRPRT-ATL Atlanta Airport Area Al	ALUM Office of Alumni Relatio	01-DEC-2006		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	REC3 Admissions Recruiter 3	UGRECRUIT UG Recruiting	01-DEC-2006		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Address details for both records:

Field	Value
Address Type	MA
Sequence Number	1
Street	234 Peachtree Road
State	GA
ZIP/PC	30310

Additional fields for both records:

Field	Value
From Date	01-DEC-2006
To Date	
Status	<input type="checkbox"/>
City	Atlanta
County	
Nation	

Steps

Follow these steps to complete the process.

1. Access the Geographic Regions/Divisions by ID Form (GOAPGEO).

2. Enter the ID of the student in the **ID** field.

Note: If you do not know the student's ID use down arrow next to the field to perform a person search.

3. Perform a **Next Block** function to navigate to the **Region** field.

Note: Today's date will default in the **Region From Date** and **Region To Date** fields (these can be changed).

4. Click the down arrow next to the **Region** field to view the Option List.

5. Select *All Geographic Region Codes*.

6. Select a region to assign with this person.

7. Click **OK**.

8. Click the down arrow next to the **Sequence Number** field to access the Address Summary Form (SOADDRQ).

9. Select an address for your person by double-clicking in the **Code** field.

Result: Information defaults to GOAPGEO.

10. If you would like to associate this person to another region, repeat the above steps.

11. Click the **Save** icon.

12. Click the **Exit** icon.

Assigning Administrators to Recruit and Applicant Records

Purpose

The Administrator Assignments Process (SORAINF) allows institutions to use the rules defined on the Administrator Role Rules Form (SOAADAS) to assign administrators to recruit and applicant records. The process populates the SORAINF table.

This process also runs when the *Assign Administrators* option is selected on the Assigned Administrators window on the Recruit Prospect Information Form (SRARECR), the Quick Recruit Form (SRAQUIK), the Admissions Application Form (SAAADMS), and the Administrator's Assignments Form (SOAINF).

Banner process

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

- Process:** A dropdown menu set to "SORAINF" and a text field containing "Administrator Assignments".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. The "Values" column has a dropdown menu. The table contains 8 rows of parameters and their corresponding values.

Number	Parameters	Values
01	Term Code	
02	Module Code	
03	Audit/Update parameter	R
04	Delete existing assignments?	N
05	Print Assignments?	TERM
06	Population Selection Appl	
07	Selection Identifier	
08	Pop Sel Creator ID	

Below the table, it states: "LENGTH: 6 TYPE: Character O/R: Required M/S: Single" and "Enter the Term Code for processing".

- Submission:** A section with a checkbox for "Save Parameter Set as", a "Name:" text field, a "Description:" text field, a radio button for "Hold", and a radio button for "Submit".

Steps

Follow these steps to complete the process.

1. Access the Administrator Assignments Process (SORAINF).
2. Enter these parameters.

Parameter	Value
Term Code	Term code of the assignment, from STVTERM
Module Code	Module for the assignment and selection, values are A (Admissions) or R (Recruiting)
Audit/Update Parameter	Enter <i>U</i> to update the database, <i>R</i> to update and produce a report, or <i>A</i> to produce an audit report
Delete Existing Assignments?	Enter <i>Y</i> to indicate that all existing assignments are to be deleted or <i>N</i> to not delete existing assignments
Population Selection Appl	Code of the application group for the population selection
Selection Identifier	Selection ID for the population selection
Pop Sel Creator ID	Creator ID for the population selection
Population Selection User ID	User ID for the population selection

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

Assigning Regions to Individuals

Purpose

The Person Geo Region/Divisions Report (GORPGEO) is used to assign regions to individuals using the data in the GORCGEO collector table in combination with the rules defined on the Geographic Region Rules Form (SOAGEOR).

Banner form

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

- Process:** A dropdown menu set to "GORPGEO" and a text field containing "Person Geo Region/Divisions".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown set to "DATABASE", a "Special Print:" text field, a "Lines:" checkbox, and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. To the right, there is a "Values" column with a dropdown menu and a vertical scrollbar. The table contains 8 rows of parameter data.
- Submission:** A section with a "Save Parameter Set as" checkbox, a "Name:" text field, a "Description:" text field, a "Hold" radio button, and a "Submit" radio button.

Number	Parameters	Values
01	Use Collector File	
02	ID	
03	Application Code	
04	Selection Identifier	
05	Creator ID	
06	Address Type	
07	Run in Sleep/Wake Mode	N
08	Sleep/Wake Time	

LENGTH: 1 TYPE: Character O/R: Required M/S: Single
Enter C for all IDs, I for individual ID, P for population selection.

Steps

Follow these steps to complete the process.

1. Access the Person Geo Region/Divisions Report (GORPGEO).
2. Enter these parameters.

Parameter	Value
Use Collector File	Valid values C, I, or P, enter <i>C</i> to run the process using all of the IDs in the collector table GORCCEO, or <i>I</i> for an individual ID in the collector table, or <i>P</i> to use population selection.
ID	ID of the person for whom you want to create geographic region/division records
Application Code	Code of the application group for the population selection
Selection Identifier	Selection ID for the population selection
Creator ID	Creator ID for the population selection
Address Type	Address type for the ID or population selection, from STVATYP
Run in Sleep/Wake Mode	Enter <i>Y</i> to run the process in sleep/wake mode.
Sleep/Wake Time	Number of seconds to sleep if Sleep/Wake Indicator parameter is entered, the default is 60 seconds
Sleep/Wake Printer	Printer to be used in the Sleep/Wake process if Sleep/Wake Indicator parameter is entered, values from GTVPRNT
Audit Indicator	Enter <i>A</i> for Audit mode, or <i>U</i> for Update mode.
Report Indicator	Enter <i>N</i> to suppress the detail and only print summary totals or <i>Y</i> to print all detail.
Population Selection User ID	Enter the Banner user ID of the person who ran the population selection on GLBDATA (optional).

3. Click the **Save** icon.

4. Click the **Exit** icon.

Assigning Regions to High Schools

Purpose

The SBGI Geo Region/Divisions Report (GORSSEO) is used to assign regions to high schools using the high school address in combination with the region rules set up on SOAGEOR.

Banner form

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

- Process:** A dropdown menu is set to "GORSSEO" and a text field contains "SBGI Geo Regions/Divisons".
- Parameter Set:** A dropdown menu is currently empty.
- Printer Control:** Includes a "Printer:" dropdown set to "DATABASE", a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. The "Values" column also has a dropdown menu. The table contains four rows of data:

Number	Parameters	Values
01	Audit Indicator	
02	Report Indicator	
03	Source/Background Inst Code	
04	Activity Date	
- Submission:** Includes a checkbox for "Save Parameter Set as", "Name:" and "Description:" text fields, and radio buttons for "Hold" and "Submit".

Below the Parameter Values table, there is a note: "LENGTH: 1 TYPE: Character O/R: Required M/S: Single Enter (U)pdate or (A)udit for run mode."

Steps

Follow these steps to complete the process.

1. Access the SBGI Geo Region/Divisions Report (GORSGEO).
2. Enter these parameters.

Parameter	Value
Audit Indicator	Enter <i>A</i> for Audit, or <i>U</i> for Update.
Report Indicator	Enter <i>Y</i> to create a detail report or <i>N</i> to suppress detail.
Source/ Background Inst Code	Source/background institution code you want to assign region records for, or leave empty to select all codes, values from STVSBGI
Activity Date	Date from which to select all changed records on SOBSBGI

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

Self Check

Directions

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

Question 1

Multiple geographic regions can be assigned to an individual or to an institution.

True or False

Question 2

List two forms that may be utilized for assigning administrators to recruit or applicant records.

Question 3

What batch process is used to assign regions to High Schools?

Answer Key for Self Check

Question 1

Multiple geographic regions can be assigned to an individual or to an institution.

True

Question 2

List two forms that may be utilized for assigning administrators to recruit or applicant records.

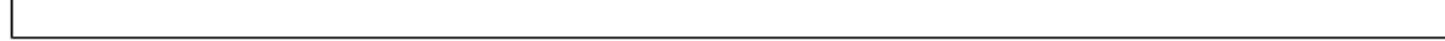
Recruit Prospect Information Form (SRARECR), the Quick Recruit Form (SRAQUIIK), the Admissions Application Form (SAAADMS), and the Administrator's Assignments Form (SOAAINF) are possible answers.

Question 3

What batch process is used to assign regions to High Schools?

The SBGI Geo Region/Divisions Report (GORSGEO)

Appendix



Forms Job Aid

Form	Full Name	Use this Form to...
GJAPCTL	Process Submission Controls	set up Communication Load process
GTVLETR	Letter Code Validation Table	define communications that can be accessed/generated by a Communication Plan in Communication Load
STVINIT	Initials Code Validation Table	define valid initials for administrators; Used in Communication Load
STVMATL	Material Code Validation Table	define valid materials (letters, etc.) referenced in Communication Plan; Used in Communication Load
SUAMAIL	Student Mail	track mail sent to prospect/recruit/student; Tracks mail sent outside of Communication Plan; Used in Communication Load
GOASGEO	Source/Background Institution Geographic	establish geographic assignments for Institutions. Used in Secondary School Tracking
SAAADMS	Admissions Application	track Student Admissions Application. Used in Secondary School Tracking
SAADCRV	Admissions Decisions	track Student Admissions Decision process. Used in Secondary School Tracking
SOAHSCH	High School Information	track Student High School information. Used in Secondary School Tracking
SOAPCOL	Prior College Information	track Student Prior College information. Used in Secondary School Tracking
SRARECR	Recruit/Prospect Information	track Recruit/Prospect information. Used in Secondary School Tracking
STVSBGI	Source/Background Institution Code Validation	specify valid institution codes for tracking information about prospects/recruits/students. Used in Secondary School Tracking

STVRATP	Assign Rating Codes	specify and define valid rating codes. Use in Admissions Rating/Administrator Roles for grouping applicants to enter admission ratings and/or admission decisions.
STVRADM	Administrative Role Code Validation	specify and define valid Administrator roles. Use in Admissions Rating/Administrator Roles
SOAADAS	Administrator Role Rules	define valid Administrator roles. Use in Admissions Rating/Administrator Roles
SOAAINF	Administrator's Assignments	specify individual Administrator assignments. Use to validate and streamline processes in Admissions Rating/Administrator Roles
SAARRCT	Admissions Rating Table	specify and define valid Admissions Rating values. Use in Admissions Rating/Administrator Roles
STVAFCT	Admissions Factor Code Validation	specify valid Admissions Factor codes. Use in Admissions Rating/Administrator Roles
SAARRFT	Admissions Rating Factor Rules	define rules for using Admissions Rating Factors. Use in Admissions Rating/Administrator Roles
SAARRDF	Admissions Rating Formula	define formula for Admissions rating. Use in Admissions Rating/Administrator Roles
GOAPGEO	Geographic Regions/Divisions by ID	assign Geographic Regions/Divisions to an individual ID.
GOASGEO	Source/Background Institution Geographic	define Region and/or Division for an Institution.
SOAADAS	Administrator Role Rules	define rules for specific Administrator Role. Need for Regionalization tracking.

SOAAINF	Administrator Assignments	specify Administrator assignments by role and ID. Need for Regionalization tracking.
SOAAROL	Administrator Role	specify individual administrator role(s). Need for Regionalization tracking.
SPAEPSC	Enrollment Planning Service Rules	establish Service Code rules for specific regions. Apply only to high school addresses.
SOAGEOR	Geographic Region Rules	establish rules for specific Geographic Regions/Divisions.
STVADDA	Administrator Assignment Data Element Validation Form	establish valid Assignment codes for use in creating Administrator assignments. Use in Regionalization tracking.
STVEPSC	Enrollment Planning Service Code Validation Form	specify valid Enrollment Planning Service Codes to be used in SPAEPSC. Contains the Enrollment Planning Service (DPS) Market codes created by the College Board along with their corresponding market names.
STVGEOD	Geographic Region Division Codes Validation Form	define valid Geographic Region divisions. Use in Regionalization tracking.
STVGEOR	Geographic Region Codes Validation Form	specify valid Geographic Region codes.
SURLOAD	Communication Load Process	insert records into GURMAIL using a flat file of PIDMs as input. Track prospect/recruit/student communications.
SURDEL	Communication Removal Process	purge records from SUAMAIL.
SOASBSM	Source/Background Institution Summary	view high school summary information. Use in Secondary School Tracking

SORSBSM	Source/Background Summary Report	produce the High School Information Summary Report; Information similar to what is seen on SOASBSM. Use in Secondary School Tracking
SOAPCSM	Prior College Enrollment Summary	display a summary of prospects/recruits/students from this source. Use in Secondary School Tracking
SORPCSM	Prior College Summary Report	produce the Prior College Summary Report; Information similar to what is seen on SOAPCSM. Use in Secondary School Tracking
SAARRAT	Admissions Rating	enters multiple ratings per individual ID. Use in Admissions Rating/Administrator Roles
SAADCBT	Admissions Decision and Rating Batch Entry	group applications and enter Admissions Decisions. Use in Admissions Rating/Administrator Roles
SAADCRV	Admissions Decision	use in Admissions Rating/Administrator Roles to review Rating types and Ratings for an ID.
SARDCBT	Rating Audit Report	view all applications updated by SAADCBT for a specified date. Use in Admissions Rating/Administrator Roles
SARRATE	Admission Rating Calculation Report	calculate admissions ratings based on user-defined formula built on SAARRDF and add the ratings to applicant records on SAARRAT.
SAARRAT	Admissions Rating	track admissions ratings by ID.
SOAAINF	Administrators Assignments	assign a Recruit/Applicant/Student to an administrator.
SOAAROL	Administrator Role	display administrative role(s) assigned to the ID.
GOAPGEO	Geographic Regions/Divisions by ID	display the geographic region(s) assigned to an ID based on its addresses. Use in Regionalization tracking.
SORAINF	Administrator Assignments Process	assign administrators to recruit and applicant records using SOAADAS. Use in Regionalization tracking

GORPGEO	Person Geo Region/Divisions Report	assign regions to individuals using GORCGEO (collector table) and SOAGEOR (rules form). Use for Regionalization tracking.
GORS GEO	SBGI Geo Region/Divisions Report	assign regions to high schools using the high school address and the region rules set up on SOAGEOR. Use for Regionalization tracking.

Terminology

Term	Definition