

Banner Student Tape Load Processing Training Workbook

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Section A: Introduction

Lesson: Overview

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Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to download search and test score data loads (tape loads). The workbook is divided into four sections:

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

Intended audience

The staff of the Admissions Office and Recruitment Office, as well as selected personnel and technical staff that will be responsible for the tape load process

Objectives

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

- identify and update values and rules necessary to maintain tape load processing
- load and process information from outside data sources.

Prerequisites

To complete this workbook, you should have

- completed the Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the Banner system
- completed the General – Common Matching training workbook
- completed the Recruiting training workbook
- completed the Admissions training workbook.

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Section A: Introduction

Lesson: Process Introduction

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Introduction

Data such as test scores or recruiting information can be entered into Banner in two ways, either manually or via a tape load.

The tape load process loads information from an outside media (e.g., ACT magnetic tapes) to Banner rather than having to type the information manually. Tape loads will also create person records in Banner.

The data sources that are currently supported by the Banner Student 7.3 are:

- ACT Tape
- SAT Tape
- SSS Student Search Service
- ACT/EOS Educational Opportunity Service
- PSAT-SSS
- GMAT Tape
- GRE
- Peterson
- PCU Private Colleges and University Search Tape
- AMCAS

This process also allows the set up of tape loads that are not supported by SunGard Higher Education.

Note: AMCAS processing is run using SRTLOAD, SRRSRIN and SRRPREL.



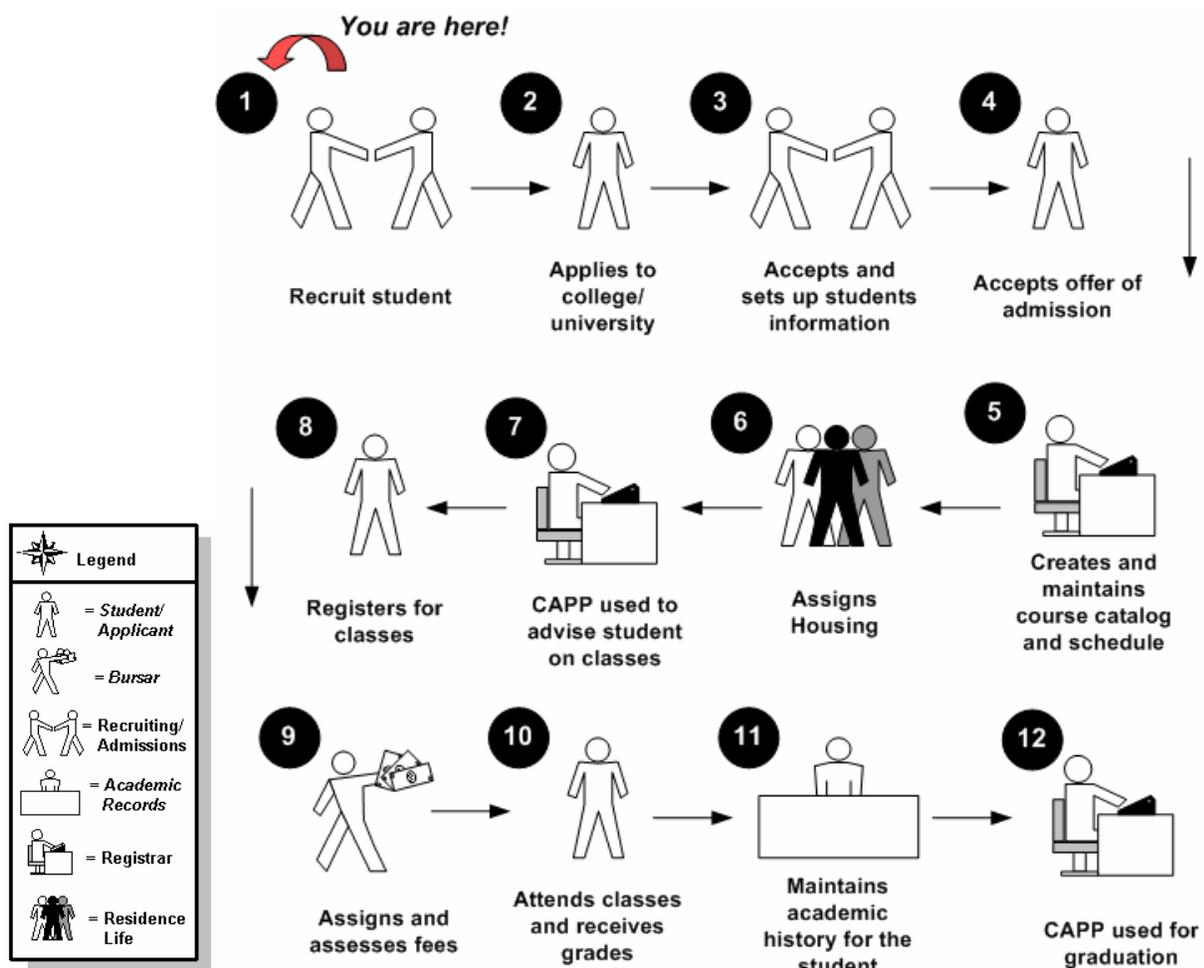
Section A: Introduction

Lesson: Process Introduction (Continued)

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Flow diagram

This diagram indicates where the tape load processes fits into the overall Student process.



What happens

In the basic tape load process

- persons are created and maintained
- supporting General Person information is created and maintained.



Section A: Introduction

Lesson: Terminology

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Parameter

A value selected in a report or process to narrow the types of records being processed.

Purge

A process of removing selected records from the Banner system.

Tape

A non-Banner file format for transferring magnetic or electronic data from one system to another.

Tape Load

A process for copying data from an outside system into Banner using magnetic or electronic data format.



Section B: Set Up

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to outline the set up necessary for tape load processing.

Intended audience

Technical and/or functional staff responsible for maintaining Banner values and rules for tape load processing and technical staff responsible for creating the data files for loading into the temporary tables.

Objectives

At the end of this section, you will be able to identify and update values and rules necessary to maintain tape load processing.



Section B: Set Up

Lesson: Overview (Continued)

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Section B: Set Up

Lesson: Validation and Rule Forms Used in the Tape Load Processing Module

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Introduction

The following validation and rules forms are used for the tape load process. Review and add values to the forms listed.

Some of these forms may be previously established through other modules. Review these forms to see how they relate to the Recruit and Admissions module and the Tape Load Process.

Form Description	Banner Name
Electronic Prospect Validation	STVPREL
Electronic Data File and Tape Validation	STVTAPE
Tape Field Names Validation	STVTPFD
Source/Background Institution Code Validation	STVSBGI
Contact Type Code Validation	STVCTYP
Interface Validation	STVINFC
Test Score Percentile Type Validation Form	STVTSPT
Tape Code Conversion	SOTCNVT
Electronic Admission Application Rules	SAAERUL
Tape Field Position Rule	SRATPFD
Tape File Delimiter Type	SORDLIM
Tape File Test Score Controls	SRATPTS
Electronic Prospects Options Default	SRAPRED



Section B: Set Up

Lesson: Electronic Prospect Validation Form

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Purpose

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

Example: The SAT test score tape can use SAT as the Prospect code.

Note: This form is also used in Self-Service for Prospects.

Banner form

Prospect Code	Description	Interface Code	Tape Code	Enter on WEB	WEB Page ID	Activity Date
ACT	ACT Test Tape	▼	ACT	<input checked="" type="checkbox"/>		10-JUL-2000
EOS_ACT	ACT EOS Search Tape		EOS_ACT	<input type="checkbox"/>		08-FEB-2000
GMAT	GMAT Test Tape		GMAT	<input type="checkbox"/>		10-JUL-2000
GRE	GRE Test Tape		GRE	<input type="checkbox"/>		10-JUL-2000
PCU	Private College Search Tape		PCU	<input type="checkbox"/>		08-FEB-2000
PETERSON	Peterson Search Tape		PETERSON	<input type="checkbox"/>		08-FEB-2000
SAT	SAT Test Tape		SAT	<input type="checkbox"/>		10-JUL-2000
SSS_SEARCH	Search Tape		SSS_SEARCH	<input type="checkbox"/>		08-FEB-2000
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Electronic Prospect Validation Form (STVPREL).
2	Enter a code in the Prospect Code field.
3	Enter a description of the code in the Description field.
4	Select an interface code in the Interface Code field.
5	Select a tape code in the Tape Code field.
6	Click the Enter on WEB checkbox if applicable.
7	Enter the WEB page ID number in the WEB Page ID field if applicable.
8	Repeat steps 2-7 as needed to enter all prospect codes.
9	Click the Save icon.
10	Click the Exit icon.



Section B: Set Up

Lesson: Electronic Data File and Tape Validation Form

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Purpose

Use the Electronic Data File and Tape Validation Form (STVTAPE) to define the unique types of search or test score tapes that a school will load. These codes are associated with the field positions of each tape on the Tape Field Position Rule Form (SRATPFDF).

Examples: PCU, Peterson, etc.

Banner form

Tape Code	Description	Activity Date
ACT	ACT Test Score Tape	10-JUL-2000
AMCS	AMCAS Test Score File	06-NOV-2005
EOS_ACT	Educ Opportunity Services	08-FEB-2000
GMAT	GMAT Test Score Tape	10-JUL-2000
GRE	GRE Test Score Tape	10-JUL-2000
PCU	Private College Guide Search	08-FEB-2000
PETERSON	Peterson Search	08-FEB-2000
SAT	SAT Test Score Tape	10-JUL-2000
SSS_SEARCH	Student Service Search	08-FEB-2000

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Electronic Data File and Tape Validation Form (STVTAPE).
2	Enter a code in the Tape Code field.
3	Enter a description of the code in the Description field.
4	Click the Save icon.
5	Click the Exit icon.



Section B: Set Up

Lesson: Tape Field Names Validation Form

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Purpose

Use the Tape Field Names Validation Form (STVTPFD) to define all the possible field names into which search or test score tape data might be loaded. You may also use this form to define all possible field names into which data from other tape sources might be loaded. The fields defined in this table are delivered by SCT.

Banner form

Field Name	Description	System Ind	Activity Date
A01_TADM_CODE	A01 Test	<input checked="" type="checkbox"/>	08-FEB-2000
A01_TEST_MON	A01 Test	<input checked="" type="checkbox"/>	08-FEB-2000
A01_TEST_SCORE	A01 Test	<input checked="" type="checkbox"/>	08-FEB-2000
A01_TEST_YEAR	A01 Test	<input checked="" type="checkbox"/>	08-FEB-2000
A02_TEST_SCORE	A02 Test	<input checked="" type="checkbox"/>	08-FEB-2000
A03_TEST_SCORE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A04_TEST_SCORE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A05_TEST_SCORE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A06_TEST_SCORE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A07_TEST_SCORE	ACT Combined English/Writing	<input checked="" type="checkbox"/>	09-AUG-2004
A1_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A2_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A3_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A4_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A5_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A6_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A7_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A8_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
A9_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
AA_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
AB_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
AC_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000
AD_INTS_CODE	From Release	<input checked="" type="checkbox"/>	08-FEB-2000

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Tape Field Names Validation Form (STVTPFD).
2	Enter a field name in the Field Name field.
3	Enter a description of the field in the Description field.
4	Click the System Ind checkbox.
5	Click the Save icon.
6	Click the Exit icon.



Section B: Set Up

Lesson: Source/Background Institution Code Validation Form

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Purpose

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

Examples: Main High School, Harvard University, Harrisburg Area Community College, Wake Forest University, Bryn Mawr College, Washington High School, Web, etc.

Banner form

Source or Background Institution	Description	Type	Source Indicator	Admissions Request	EDI	FICE	Voice Response Message Number
000003	Bryn Mawr	C	<input checked="" type="checkbox"/>	CLT1	Y	12345	
002078	Loyola College in MD	C	<input checked="" type="checkbox"/>	CLT1			
002631	Rutgers State Univ - NJ	C	<input checked="" type="checkbox"/>	CLT1			
003754	Virginia Poly Instst & St Univ	C	<input checked="" type="checkbox"/>	CLT1	Y		
0462	Athens Area Technical List	C	<input checked="" type="checkbox"/>	CLT1			
0929	Houston Community College	C	<input checked="" type="checkbox"/>	CLT1	Y		
1005	Auburn University	C	<input checked="" type="checkbox"/>	CLT1	Y	123456	
1008	Alcorn State University	C	<input checked="" type="checkbox"/>	CLT1			
102	Univ of Alaska - Fairbanks	C	<input checked="" type="checkbox"/>	CLT1			
1028	Austin Peay State University	C	<input checked="" type="checkbox"/>	CLT1			
1036	Auburn Univ at Montgomery	C	<input checked="" type="checkbox"/>	CLT1			
10461	Fordham University	C	<input checked="" type="checkbox"/>	CLT1			
1051	Ball State University	C	<input checked="" type="checkbox"/>	CLT1			
1060	Berea College	C	<input checked="" type="checkbox"/>	CLT1			
10866	Carpe Diem University	C	<input checked="" type="checkbox"/>	CLT1			
1094	University of Colorado	C	<input checked="" type="checkbox"/>	CLT1			
10975	Harvard University - Extension	C	<input checked="" type="checkbox"/>	CLT1			
11275	University of Toronto	C	<input checked="" type="checkbox"/>	CLT1			
11315	Mount Saint Vincent	C	<input checked="" type="checkbox"/>	CLT1			
11354	Vista Community College	C	<input checked="" type="checkbox"/>	CLT1			

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Source/Background Institution Code Validation Form (STVSBGI)
2	Perform an Execute Query function. <u>Result:</u> The data delivered with this form is displayed.
3	Modify the form if needed.
4	Click the Save icon.
5	Click the Exit icon.



Section B: Set Up

Lesson: Contact Type Code Validation Form

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Purpose

The Contact Type Code Validation Form (STVCTYP) is used to create, update, insert, and delete recruiting contact type codes.

Examples: Campus Visit, College Night, or Merit List Letter, etc...

Note: The Recruiting and Admissions modules and the Interface Validation Form (STVINFC) use this form to validate contact type codes.

Banner form

Code	Description	Activity Date
CMP	Campus Visit	05-JAN-1988
CNN	College Night	07-APR-1987
CNS	Counselor Visit	25-MAR-1987
DLL	Dean's List Letter	29-APR-1987
FIN	Financial Aid Tape	04-FEB-1995
FUL	Follow-up Letter	29-APR-1987
HLL	Honors List Letter	29-JAN-1991
IN1	Interview One	13-APR-1987
IN2	Interview Two	03-JAN-1995
INP	In-person	25-MAR-1987
MIL	Military Interest Letter	03-JAN-1995
MLL	Merit List Letter	29-APR-1987
PGL	Univ Pres Greeting Letter	22-MAY-1987
PHN	Phone Call	25-MAR-1987
TAP	Test Score Tape	09-OCT-1987

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Contact Type Code Validation Form (STVCTYP).
2	Enter a three-character code in the Code field.
3	Enter a description of the code in the Description field.
4	Click the Save icon.
5	Click the Exit icon.



Section B: Set Up

Lesson: Interface Validation Form

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Purpose

The Interface Validation Form (STVINFC) is used to create, update, insert, and delete interface codes (i.e., ACT, Financial Aid CSS tape, or GRE, etc.). This form is used by the Electronic Prospect Validation Form (STVPREL) to validate the interface codes. This form is used to map an Interface Code to a Common Matching Source Rule. You may only create or update these codes from this form.

The Common Matching Source Rule entered here will link the student matching process with the new match routine. (Requires GTVCMSC.) See Common Matching Handbook.

The Contact Code entered here will be used if SRTLOAD Parameter #8 Source is left blank. (Requires STVCTYP).

The Source Code entered here will be used if SRTLOAD Parameter #9 Source is left blank. (Requires STVSBGI).

Banner form

Interface Code	Description	Test Source	Source Code	Contact Type	Common Matching Source	Activity Date
ACT	ACT	TAPE	A00005	TAP	HSCHTEST	Match test using high school field: 18-OCT-2004
AMCS	AMCAS Tape Types	AAMC	AMCAS	TAP	AMCASTST	Test code for AMCAS ID 03-AUG-2005
EOS	EOS ACT Tape	TAPE	A00005	TAP	HSCHTEST	Match test using high school field: 17-AUG-2004
FACT	Financial Aid ACT Tape Load	TAPE	A00005	TAP		07-APR-1988
FCSS	Financial Aid CSS Tape	TAPE	A00005	TAP		07-APR-1988
FGAP	GAPSFAS Financial Aid Tape	TAPE	A00005	TAP		16-APR-2004
FPEL	PELL Financial Aid Tape	TAPE	A00005	TAP		07-APR-1988
GMAT	GMAT	TAPE	A00005	TAP	HSCHTEST	Match test using high school field: 31-MAR-2005
GRE	GRE	TAPE	A00005	TAP	HSCHTEST	Match test using high school field: 11-AUG-2005
PCU	Private Colleges and Universit	TAPE	A00005	TAP	WEBADM	Web Admissions Matching Source 19-APR-2005
PETR	Petersons	TAPE	A00005	TAP	WEBADM	Web Admissions Matching Source 27-MAY-2005
PSAT	SSS SEARCH/PSAT	TAPE	A00005	TAP	HSCHTEST	Match test using high school field: 15-MAR-2005
UGRD	Undergrad	STDN	WEBADM	WEB	WEBADM	Web Admissions Matching Source 02-FEB-2005
WEB3	Web Admissions-noRules	STDN	WEBADM	WEB	WEBADM3	Test for noRules 18-OCT-2004
WEBA	Web Admissions	STDN	WEBADM	WEB	WEBADM	Web Admissions Matching Source 01-DEC-2004
WWU	Web Prospect Undergrad	STDN	WEBPRO	WEB	HSCHTEST	Match test using high school field: 02-FEB-2005



Section B: Set Up

Lesson: Interface Validation Form (Continued)

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Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Interface Validation Form (STVINFC).
2	Enter a code in the Interface Code field.
3	Enter a description of the code in the Description field.
4	Select a test source code in the Test Source field.
5	Select a source code in the Source Code field.
6	Select a contact type code in the Contact Type field.
7	Select a code in the Common Matching Source field.
8	Click the Save icon.
9	Click the Exit icon.



Section B: Set Up

Lesson: Test Score Percentile Type Validation Form

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Purpose

Use the Test Score Percentile Type Validation Form (STVTSPT) to create and maintain percentile type codes for use on SOATEST.

Note: Currently, SAT and GRE files that are loaded via SRTLOAD/baseline tape load processing use delivered, system-required values on STVTSPT for percentile types. It is suggested when manual SAT or GRE percentiles are inserted on SOATEST that these percentile types be used.

Banner form

Code	Description	System Required	User ID	Activity Date
GRP	GRE Percentile	<input checked="" type="checkbox"/>	BANINST1	15-JUL-2005
NAT	National	<input type="checkbox"/>	LPARRISH	12-OCT-2005
S2N	SAT II National College-Bound Percentile	<input checked="" type="checkbox"/>	BANINST1	15-JUL-2005
SMN	SAT Math National College-Bound Percentile	<input checked="" type="checkbox"/>	BANINST1	15-JUL-2005
SMS	SAT Math State College-Bound Percentile	<input checked="" type="checkbox"/>	BANINST1	15-JUL-2005
ST	State	<input type="checkbox"/>	LPARRISH	12-OCT-2005
SVN	SAT Verbal National College-Bound Percentile	<input checked="" type="checkbox"/>	BANINST1	15-JUL-2005
SVS	SAT Verbal State College-Bound Percentile	<input checked="" type="checkbox"/>	BANINST1	15-JUL-2005
SWN	SAT Writing National College-Bound Percentile	<input checked="" type="checkbox"/>	BANINST1	15-JUL-2005
SWS	SAT Writing State College-Bound Percentile	<input checked="" type="checkbox"/>	BANINST1	15-JUL-2005
		<input type="checkbox"/>		28-OCT-2005
		<input type="checkbox"/>		

Procedure

Follow these steps to

Step	Action
1	Access the Test Score Percentile Type Validation Form (STVTSPT).
2	Enter a test score percentile code in the Code field.
3	Enter a description of the code in the Description field. <u>Note:</u> The System Required checkbox is used to determine which values are required by the system. If the System Required checkbox is checked, the validation table record cannot be deleted. The User ID and Activity Date fields are display-only fields.
4	Click the Save icon.
5	Click the Exit icon.



Section B: Set Up

Lesson: Tape Code Conversion Form

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Purpose

The Tape Code Conversion Form (SOTCNVT) is used to convert codes on interface tapes to valid Banner values before data is added to the system during the tape load process.

Example: If the SAT tape has a major code of *ENGL* for English and your institution's code for English is *100*, the table name would be MAJR, the tape value would be *ENGL* and the converted value would be *100*.

Values are associated with an Interface Type to allow for different settings based on the incoming values provided with each tape type. Use either an “*” or DEFAULT to process null or values not useful for your institution. Those values which are required by Banner must have a conversion value, i.e., Major code is blank on the tape, but the converted value for Banner would need to be 0000, undeclared.

Banner form

Table Name	Tape Value	Conversion Code	Description
<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"/>



Section B: Set Up

Lesson: Tape Code Conversion Form (Continued)

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Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Tape Code Conversion Form (SOTCNVT).
2	Select an interface type in the Interface Type field.
3	Enter a last four characters of the validation table name in the Validation Table Name field. <u>Note:</u> You can use the Copy Values button to copy values from one interface code to another (optional).
4	Perform a Next Block function.
5	Enter a value in the Tape Value field.
6	Select a conversion code in the Conversion Code field.
7	Enter a description in the Description field.
8	Click the Save icon.
9	Click the Exit icon.



Section B: Set Up

Lesson: Electronic Admission Application Rules Form

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Purpose

The Electronic Admissions Application Rules Form (SAAERUL) is used to define the rules that are used when processing electronic applications, electronic prospects, and tapeloads.

Note: No rules should be added locally. Rules that will be used in system processing will be delivered by Sungard SCT; you need only to update the Rule Value to reflect local processing options.

Records may be created on SPAPERS, SPAIDEN, SPATELE, SOAHSCH, and/or SRARECR based upon the rules.

Any null fields on SPAPERS will be filled in with the appropriate data from the search tape.

Banner form

Electronic Admissions Application Rules SAAERUL 7.1

Group: ▼ Copy PREL Group: 

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

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Electronic Admissions Application Rules Form (SAAERUL).
2	Enter a group code in the Group field. <u>Note:</u> The Copy PREL Group button can be used to copy existing PREL rules to a new group code (optional).
3	Perform a Next Block function.
4	Review the data provided.
5	Click the Exit icon.



Section B: Set Up

Lesson: Tape Field Position Rule Form

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Purpose

Use the Tape Field Position Rule Form (SRATPFDF) to define either the exact positions in which each field exists on a search or test score tape or the relative position of each field and then to assign the value in those positions to the appropriate Banner fields. You can display different fields depending on whether the specified tape code is for a positional layout, such as SAT or ACT, or for a sequential layout, such as a comma delimited file. The fields displayed are determined by the tape code entered in the key block.

This form, in combination with the Electronic Prospect Load (SRTLLOAD), the Electronic Prospect Match (SSRSRIN), and the Migrate Electronic Prospects Process (SRRPREL), allows institutions to set up tape loads that are not supported by SunGard SCT, such as AP (Advanced Placement exams) or other search or test score tapes.

Banner form

Tape Code: ACT Test Score Tape Record Number:

Field Name	Start Position	End Position	Occurrence	Activity Date
NAME_LAST	3	27	1	10-JUL-2000
NAME_FIRST	28	43	1	10-JUL-2000
NAME_MI	44	44	1	10-JUL-2000
STREET_LINE1	45	74	1	10-JUL-2000
STREET_LINE2	75	84	1	10-JUL-2000
GENDER	88	88	1	10-JUL-2000
SSN	91	99	1	10-JUL-2000
BIRTH_MON	101	102	1	10-JUL-2000
BIRTH_DAY	103	104	1	10-JUL-2000
BIRTH_YEAR	105	106	1	10-JUL-2000
PHONE_AREA	107	109	1	10-JUL-2000
PHONE_NUMBER	110	116	1	10-JUL-2000
CITY	117	141	1	10-JUL-2000
STAT_CODE	144	145	1	10-JUL-2000
ZIP	146	154	1	10-JUL-2000
A07_TEST_SCORE	163	164	1	09-AUG-2004
SWR_TEST_SCORE	165	166	1	09-AUG-2004
NEW_TEST_SCORE	167	168	1	09-AUG-2004
NWR_TEST_SCORE	169	170	1	09-AUG-2004
HSCH_SBG1_CODE	205	210	1	10-JUL-2000



Section B: Set Up

Lesson: Tape Field Position Rule Form (Continued)

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Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Tape Field Position Rule Form (SRATPFDF).
2	Select a code in the Tape Code field.
3	Enter the record number for the rule in the Record Number field.
4	Perform a Next Block function.
5	Select a field name in the Field Name field.
6	Enter a number in the Start Position field.
7	Enter a number in the End Position field.
8	Enter a value in the Occurrence field. <u>Note:</u> This is the occurrence of the data item on the tape. It can be used to accommodate those tape values that may occur multiple times such as test scores for different test dates. The fields defined in this form are delivered by SunGard SCT.
9	Repeat steps 2-7 for each field on the tape.
10	Click the Save icon.
11	Click the Exit icon.



Section B: Set Up

Lesson: Tape File Delimiter Type Rules Form

◀ Jump to TOC

Purpose

Use the Tape File Delimiter Type Rules Form (SORDLIM) to assign a delimiter and/or marker to a specific tape code. The delimiter and/or marker should match those contained in the delimited input file to be used with this tape code.

Banner form

Tape Code	Description	Delimiter	Marker	System Required	User ID	Activity Date
AMCAS	AMCAS Test Score File			<input checked="" type="checkbox"/>	BANINST1	27-MAY-2005
EOS_ACT	Educ Opportunity Services	,	'	<input type="checkbox"/>	DPLATH	03-FEB-2005
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Tape File Delimiter Type Rules Form (SORDLIM).
2	Perform an Insert Record function.
3	Enter the data file/tape code for the rule in the Tape Code field. <u>Note:</u> You can click the down arrow above the field to use the List of Values. The description of the tape code will default from the Electronic Datafile and Tape Validation Form (STVTAPE).
4	Enter the delimiter in the Delimiter field. <u>Note:</u> The delimiter indicates a new field on the tape. <u>Example:</u> An example of a delimiter is a comma.
5	Enter the marker used in addition to the delimiter to enclose the field data in the Marker field. <u>Example:</u> An apostrophe is an example of a marker.
6	Select the System Required checkbox if the rule is system required.
7	Click the Save icon. <u>Note:</u> The User ID and Activity Date will default into their corresponding fields.
8	Click the Exit icon.



Section B: Set Up

Lesson: Tape File Test Score Controls Form

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Purpose

Use the Tape File Test Score Controls Form (SRATPTS) to map the test code which contains the “date taken” to all the other test codes for which that date taken applies.

Example: The date taken for one set of SAT I scores is contained in only one place, even though that date applies to both the SAT Verbal and Math scores.

Banner form

Tape File Test Score Controls SRATPTS 7.1

Test Code	Description	Test Code Date Origin	System Required	User ID	Activity Date
A01	ACT English	A01	<input checked="" type="checkbox"/>	DFLATH	01-APR-2005
A02	ACT Math	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
A03	ACT Reading	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
A04	ACT Science Reasoning	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
A05	ACT Composite	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
A06	ACT Sum of Standard Score	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
A07	ACT Combined English/Writing	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
G01	GMAT Verbal Score	G01	<input type="checkbox"/>	BANINST1	03-FEB-2005
G02	GMAT Quantitative Score	G01	<input type="checkbox"/>	BANINST1	03-FEB-2005
G03	GMAT Total Converted Score	G01	<input type="checkbox"/>	BANINST1	03-FEB-2005
G04	GMAT Writing Score	G01	<input type="checkbox"/>	BANINST1	03-FEB-2005
G05	GMAT Total Score	G01	<input type="checkbox"/>	BANINST1	03-FEB-2005
G06	GMAT Verbal Converted	G01	<input type="checkbox"/>	BANINST1	03-FEB-2005
G07	GMAT Quantitative Converted	G01	<input type="checkbox"/>	BANINST1	03-FEB-2005
G08	GMAT Writing Converted	G01	<input type="checkbox"/>	BANINST1	03-FEB-2005
NAG	ACT Norm Alg/Geometry	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
NAL	ACT Norm Art/Literature	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
NEA	ACT Norm Elementary Alg	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
NEW	ACT Norm English/Writing	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005
NGT	ACT Norm Plane Geom/Trig	A01	<input type="checkbox"/>	BANINST1	03-FEB-2005



Section B: Set Up

Lesson: Tape File Test Score Controls Form (Continued)

◀ Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Tape File Test Score Controls Form (SRATPTS).
2	Enter the test code to which a date origin will be assigned in the Test Code field. <u>Note:</u> Click the down arrow below the field to use the List of Values. The description of the test code defaults in from the tape code selected from the Test Code Validation Form (STVTESC).
3	Enter the test code date origin for the test code in the Test Code Date Origin field. <u>Note:</u> Click the down arrow below the field to use the List of Values from the Test Code Validation Form (STVTESC).
4	Select the System Required checkbox if the rule is system required.
5	Click the Save icon. <u>Note:</u> The User ID and Activity Date will default into their corresponding fields.
6	Click the Exit icon.



Section B: Set Up

Lesson: Electronic Options Prospects Default

◀ Jump to TOC

Purpose

The Electronic Options Prospects Default (SRAPRED) is used to define defaults such as Recruit Type and Student Type.

Note: This form is optional.

Banner form

Electronic Prospects Default Options SRAPRED 7.0 (s7s7010g) (CHICAG)

Electronic Prospect Code: Clear Defaults

General Default Values

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

Curriculum Default Values

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

Web Electronic Prospect Code; Press LIST for valid values.
Record: 1/1 | ... List of Valu... | <OSC>



Section B: Set Up

Lesson: Electronic Options Prospects Default (Continued)

◀ Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Electronic Prospects Default Options form (SRAPRED). <u>Note</u> : This is an optional form.
2	Enter a prospect code in the Electronic Prospect Code field.
3	Perform a Next Block function.
4	Enter values in the fields listed under <u>General Default Values</u> and <u>Curriculum Default Values</u> .
5	Click the Save icon.
6	Click the Exit icon.



Section B: Set Up

Lesson: Self Check

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Directions

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

Match the form to its description by filling in the blank with the correct letter.

- | | | |
|--|-------|--|
| a. Electronic Prospect Validation Form | _____ | Use this form to create, update, insert, and delete source or background institution codes. |
| b. Electronic Data File and Tape Validation Form | _____ | This form is used to define the rules that are used when processing electronic applications, electronic prospects, and tape loads. |
| c. Tape Field Names Validation Form | _____ | Use this form to define the positions that exist for the various fields on each search or test score tape and to assign the value in these positions to the appropriate Banner fields. |
| d. Source/ Background Institution Code Validation Form | _____ | This form is used to convert codes on interface tapes to valid Banner values before data is added to the system during the tape load process. |
| e. Contact Type Validation Form | _____ | Use this form to define the various types of search or test score tapes that are to be loaded. |
| f. Interface Validation Form | _____ | Use this form to define all the possible field names into which search or test score data might be loaded. |
| g. Tape Code Conversion Form | _____ | Use this form to create, update, insert, and delete interface codes. |
| h. Electronic Admission Application Rules Form | _____ | Use this form to map the test code which contains the “date taken” to all the other test codes for which that date taken applies. |
| i. Tape Field Position Rule Form | _____ | Use this form to assign a delimiter and/or marker to a specific tape code. |
| j. Tape File Delimiter Type Rules Form | _____ | Use this form to create, update insert, and delete recruiting contact type codes. |
| k. Tape File Test Score Controls Form | _____ | Use this form to define the unique types of search or test score tapes that a school will load. |



Section B: Set Up

Lesson: Answer Key

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- | | |
|---|---|
| a. Electronic Prospect Validation Form | d. Use this form to create, update, insert, and delete source or background institution codes. |
| b. Electronic Data File and Tape Validation Form | h. This form is used to define the rules that are used when processing electronic applications, electronic prospects, and tape loads. |
| c. Tape Field Names Validation Form | i. Use this form to define the positions that exist for the various fields on each search or test score tape and to assign the value in these positions to the appropriate Banner fields. |
| d. Source/
Background
Institution Code
Validation Form | g. This form is used to convert codes on interface tapes to valid Banner values before data is added to the system during the tape load process. |
| e. Contact Type Validation Form | a. Use this form to define the various types of search or test score tapes that are to be loaded. |
| f. Interface Validation Form | c. Use this form to define all the possible field names into which search or test score data might be loaded. |
| g. Tape Code Conversion Form | f. Use this form to create, update, insert, and delete interface codes. |
| h. Electronic Admission Application Rules Form | k. Use this form to map the test code which contains the “date taken” to all the other test codes for which that date taken applies. |
| i. Tape Field Position Rule Form | j. Use this form to assign a delimiter and/or marker to a specific tape code. |
| j. Tape File Delimiter Type Rules Form | e. Use this form to create, update insert, and delete recruiting contact type codes. |
| k. Tape File Test Score Controls Form | b. Use this form to define the unique types of search or test score tapes that a school will load. |



Section C: Day-to-Day Operations

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to explain procedures related to loading and processing of information received from outside data sources.

Intended audience

The staff of the Admissions Office and Recruitment Office, as well as selected personnel who maintain biographic and demographic data for prospects or applicants and the technical staff who would create a data file for loading.

Objectives

At the end of this section, you will be able to load and process information from outside data sources.

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Section C: Day-to-Day Operations

Lesson: Process Introduction

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About the process

External data is loaded into various sets of temporary tables depending on the source of the external data.

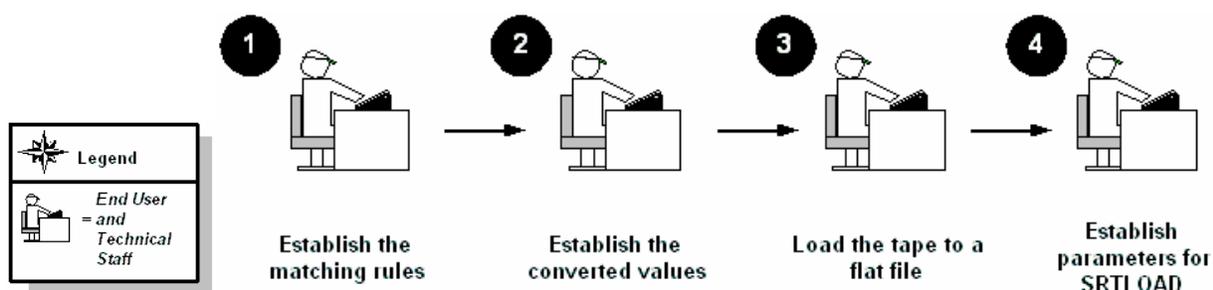
Note: Test score data is loaded onto temporary tables beginning with SRT. Web admissions data is loaded into temporary tables beginning with SAR. Electronic Prospect data is loaded into temporary tables beginning with SOR or SRT.

Data loaded into the SRT temporary tables can be viewed on the Electronic Prospect Inquiry Form (SRIPREL) and the Electronic Prospect Detail Form (SRAPREL). Data loaded into the SAR temporary tables can be viewed on the Electronic Application Submitted Form (SAAETBL).

Once data has been loaded into its respective temporary tables, it can be matched manually (using SRIPREL or SAAEAPS) or in batch (using SRRSRIN or SARETMT).

Note: AMCAS processing is run using SRTLOAD, SRRSRIN and SRRPREL. The SARAMXF and SARAMDP processes, as well as the SAVAMCD, SAVAMCT, and SAVAMC2 views are used in AMCAS processing.

Flow diagram





Section C: Day-to-Day Operations

Lesson: Process Introduction (Continued)

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What happens

The table outlines what happens in this process.

Stage	Description
1	Establish the matching rules for each tape type. <u>Note:</u> This should have been done as part of the completing the General – Common Matching training workbook.
2	Establish the converted values on the Tape Code Conversion Form (SOTCNVT).
3	Load the tape to a flat file named XXXYYYYY.DAT where XXX = the name of the tape and YYYY = processing year.
4	Establish the parameters for SRTLOAD on the Process Submission Control Form (GJAPCTL). <u>Note:</u> Steps 1, 2, 3 and 4 are performed for each tape prior to the tape load job.



Section C: Day-to-Day Operations

Lesson: Process Introduction (Continued)

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Electronic Prospect Match

The Electronic Prospect Match (SRRSRIN) is used to determine if a record already exists in Banner for persons in the temporary tables.

- If the record exists in Banner, then the match status on the temporary table for this record is set to *M* (Matched).
- If the record does not match, then the match status is set to *N* (New).
- If the record is considered a suspense, (that is, some elements are matched but not enough to be considered a match), then the match status is set to *S* (Suspense).
- There is also another status of *E* (Error), meaning some portion of the data on the comparison of the record in Banner and the record in the temporary table have something missing from the Common Matching rules (for example, SSN, State, Zip, etc.).

Electronic Prospect Inquiry

All records in the temporary files can be viewed on the Electronic Prospect Inquiry Form (SRIPREL). Those records with a status of suspense can be viewed on this form by running a query on a match status of *S*. You may access the Common Matching Entry Form (GOAMTCH) from this form, which queries Banner data to assist in determining if a matching record exists. If the record is a match, click the SELECT ID icon. If the record is new click CREATE NEW icon.

Migrate Electronic Prospects

Once all suspended records have been updated to either *N* (New) or *M* (Matched), the Migrate Electronic Prospects Process (SRRPREL) is run. Depending on the values set for the parameters, as well as the values set for the rules on SAAERUL, a new recruit record may be created or an existing record may be updated at the time the test scores are loaded. If an address with the same address type already exists in Banner, then an additional address record may be created with the same address type and a one-up sequence number. If an existing recruit record is to be updated, then a contact for this specific tape will be added to the record.



Section C: Day-to-Day Operations

Lesson: Process Introduction (Continued)

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If a match does not exist

For the existing rule label CREATENEWRECR (no recruit exists, create new recruit), the possible values are Y and N. When an incoming record is being loaded and matched to an existing Banner person, the code will check if a recruiting record already exists for the person. If the rule value is Y, then the incoming data will be used to create a recruiting record. If the rule value is N, then no recruiting record will be created.

In addition, records may be created for this person on the following forms, depending on the rules settings on the Electronic Admissions Application Rules Form (SAAERUL):

- SPAPERS – demographic information
- SPAIDEN – address information
- SPATELE – telephone information
- SPAINTL - international information
- SOAPCOL – prior college information
- SOAHSCH – high school information
- SRARECR – source, contact, and interests
- SOATEST - test scores (for test score tapes only)

If a match exists

If a match exists, then what happens will also depend on the values set on the Electronic Admissions Application Rules Form (SAAERUL) where the group code is equal to PREL. An existing recruit record may be updated with a new source or contact, or an entirely new recruit record may be created at the time the test scores are loaded. Regardless of the values set on SAAERUL, any null fields on the General Person Form (SPAPERS) will be filled in if the data for these fields exists on the search or test score tape.

In either case, the load status on SRIPREL is set to C, indicating that an Banner record was created or updated for this person using the data in the temporary tables.



Section C: Day-to-Day Operations

Lesson: Setting Up Tape Load Processing

◀ Jump to TOC

Loading data

This Electronic Prospect Load Process (SRTLLOAD) loads data from a search input file (e.g., College Guide/SSS, or Peterson) or a test score report file (i.e., SAT, ACT, GRE, or GMAT) to the following temporary tables: SRTIDEN, SRTPERS, SRTTELE, SRTADDR, SRTTEST, SRTPREL, SRTHSCH, SRTPCOL. The data in these tables is accessible using the Search Tape View (SRVPREL). After being loaded, all records have a match and load status of null, meaning they have not been matched to a Banner record or loaded into Banner.

The load process also creates an audit report detailing the status of each record on the input file.

Setup needed

In preparation for running SRTLLOAD, you should

- set up the corresponding INFC code value on STVPREL
- set up rules on the Tape Conversion Form (SOTCNVT) for the conversion of the tape values to the Banner validation table values.

Converting data

The codes listed below are compared with SOTCNVT for conversion to Banner values and for default values.

If the code on the tape is empty, the value * is matched against SOTCNVT. However, if the tape value is not empty, the incoming value is matched against SOTCNVT. If there is no available conversion for the tape value or the tape value is not valid on the Banner validation table, the literal DEFAULT is matched against SOTCNVT. An error message will be printed on the report if this is not available.

These values are converted from the value on the incoming tape to the appropriate Banner value and loaded to the appropriate temporary tables.

ADMIT	DEPT	GNDR	RELG	TEFR
CAMP	EDLV	INTS	SBGI	TERM
CITZ	EGOL	INTP	SBGH	TESC
CNTY	ESEL	MAJR	STAT	TSPT
DEGC	ETHN	MAJP	TADM	VTYP
DEGA	ETHR	NATN	TEAC	



Section C: Day-to-Day Operations

Lesson: Setting Up Tape Load Processing (Continued)

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Converting data, continued

The exceptions for determining conversions and default values are for the following codes:

major code	interest code	term code
level code	campus code	contact type code
source code	address type code	email type code
telephone code		

SRTLLOAD will analyze the high school or prior college graduation date against SOTCNVT to determine the term code. If there is no match, the value from the Term Code parameter is used. The level code, address type code, telephone type code, and email code inserted will always be from the input parameter value. If no source code or contact type code are entered in the input parameters, the value from STVINFC for the interface will be used. In addition, the test score source inserted on test scores will be the one created on STVINFC.

The fields INTS and MAJR can have multiple values in multiple fields for some types of tape loads. The * and DEFAULT functionality will only work on the first match attempt for the field MAJR (MAJR1). If there are values in fields MAJR2, MAJR3, or MAJR4, the process will attempt to match the values against the SOTCNVT crosswalk and the values in STVMAJR. If no match is found for these, the output report will display an error indicating the field and the error. INTS will not use the * or the DEFAULT functionality due to the possibility of many records existing on the incoming data file.



Section C: Day-to-Day Operations

Lesson: Running the Electronic Prospect Load Process

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Purpose

Records can be loaded into the production tables either manually or electronically using processes in Job Submission. External data is first loaded into temporary tables using the SRTLOAD process. Running the Electronic Prospect Load Process (SRTLOAD) is how the data from the tape files is transferred to temporary tables.

Based on whether rules for file delimiters or delimiters/markers exist in the SORDLIM table for a given tape code, SRTLOAD will either look for the fields by position or by sequence number as defined in the SRRTPFD_START_POS field.

Once this process is run, either (1) use SRIPREL to manually load the information into the Banner production tables or (2) run SRRSRIN to match the data, then run SRRPREL to load the data into production.

Banner process

Process Submission Controls GJAPCTL 7.2		
Process:	<input type="text" value="SRTLOAD"/> <input type="text" value="Electronic Prospect Load"/>	Parameter Set: <input type="text"/>
Printer Control		
Printer:	<input type="text"/>	Special Print: <input type="text"/>
Lines:	<input type="text" value="55"/>	Submit Time: <input type="text"/>
Parameter Values		
Number	Parameters	Values
01	<input type="text" value="Data File Name"/>	<input type="text"/>
02	<input type="text" value="Electronic Prospect Code"/>	<input type="text"/>
03	<input type="text" value="Tape ID"/>	<input type="text"/>
04	<input type="text" value="AMCAS School Number"/>	<input type="text"/>
05	<input type="text" value="SSN or Generated ID"/>	<input type="text" value="G"/>
06	<input type="text" value="Term Code"/>	<input type="text"/>
07	<input type="text" value="Level Code"/>	<input type="text"/>
08	<input type="text" value="Campus Code"/>	<input type="text"/>
LENGTH: 30 TYPE: Character O/R: Required M/S: Single Data file name, can include the directory: /tmp/search.dat.		
Submission		
<input type="checkbox"/> Save Parameter Set as	Name: <input type="text"/>	Description: <input type="text"/>
		<input type="radio"/> Hold <input checked="" type="radio"/> Submit



Section C: Day-to-Day Operations

Lesson: Running the Electronic Prospect Load Process (Continued)

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Parameters

Use the information in the table to complete the procedure that follows.

Req?	Parameter	Description
✓	Data File Name	Data file name containing the search or test score tape records or test score tape records to be loaded; can include the directory: /tmp/search.data.
✓	Electronic Prospect Code	Electronic prospect code to be used in the load; see table below for values.
	Tape ID	Additional ID of the tape; useful if loading multiple tapes of same prospect code.
	AMCAS School Number	Enter the AMCAS school code to be processed in the load. This parameter is optional for all incoming AMCAS files.
✓	SSN or Generated ID	Enter <i>S</i> to use SSN (Social Security Number) on data file; enter <i>G</i> to always generate an ID. <u>Note:</u> If the ID is generated or the incoming data is all zeros (as is the case with some ACT records), the process will display <i>GEN</i> in the ID field on the output report when the report is executed in audit mode; the actual generated IDs will display on the output report when the report is executed in update mode.
✓	Term Code	Term code that will be used if a term code cannot be determined from the high school graduation date on the search or test score tape and the SOTCNVT conversion rules.
✓	Level Code	Level code that will go on the prospect record <u>Example:</u> <i>UG</i> – undergraduate
	Campus Code	Campus code that will go on the prospect record <u>Example:</u> <i>M</i> – Main
	AMCAS Degree Code	Degree code for the prospect record. This parameter is optional for all tapes except AMCAS.
	AMCAS Major Code	Major code for the prospect record. This parameter is optional for all tapes except AMCAS. AMCAS requires the major code for the application when SRTLOAD is run for the electronic prospect code <i>AMCS</i> .
	Department Code	Department code for the prospect record.



Section C: Day-to-Day Operations

Lesson: Running the Electronic Prospect Load Process (Continued)

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Parameters, continued

Req?	Parameter	Description
	Contact Code	Contact code that will go on the prospect record <u>Example:</u> <i>TAP</i> – Test score tape
	Source Code	Source code that will go on the prospect record <u>Example:</u> <i>1008</i> – Alcorn State University
✓	Address Type Code	Address type code for the prospect <u>Example:</u> <i>PR</i> – permanent
✓	Address Source Code	Address source code for the prospect record
	Telephone Type Code	Default telephone type code for prospect record <u>Example:</u> <i>PI</i> – Parent 1
	Email Type Code	Email type code for the prospect <u>Example:</u> <i>CAMP</i> – campus email
✓	Print Test Scores	Enter <i>Y</i> to print test scores on the report while processing test score records; enter <i>N</i> to suppress printing test scores <u>Default:</u> <i>Y</i> – Yes
	Default Test Month	Default month for the test, if none exists on the input file. <u>Values:</u> <i>01</i> – <i>12</i>
✓	Print County Code Errs (AMCAS)	Enter <i>Y</i> to print validation errors for the county for AMCAS processing or <i>N</i> to not print validation errors.
✓	Print Validation Summary	Enter <i>Y</i> to print the validation summary or <i>N</i> to not print the validation summary.
✓	Run Mode	Enter <i>U</i> to update the database; enter <i>A</i> to produce audit report <u>Default:</u> <i>U</i> <u>Note:</u> Run the process in audit mode to determine what values are missing from Banner (e.g., high school codes, major codes). If these values are not created in Banner and converted using SOTCNVT where appropriate, the value will not be loaded into Banner.



Section C: Day-to-Day Operations

Lesson: Running the Electronic Prospect Load Process (Continued)

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Prospect and tape codes by tape type

Use the information in the table to complete the procedure that follows.

Tape Type	Prospect Code from STVPREL	Tape Code from STVTAPE
SAT	SAT	SAT
ACT	ACT	ACT
GRE	GRE	GRE
GMAT	GMAT	GMAT
SSS (psat)	SSS_PSAT	SSS_SEARCH
SSS (sat)	SSS_SAT1	SSS_SEARCH
Peterson	PETR	PETERSON
ACT/ EOS	ACT_EOS	ACT_EOS
PCU	PCU	PCU

Procedure

Follow these steps to run the Electronic Prospect Load Process.

Step	Action
1	<p>Create the data file for loading.</p> <p><u>Example:</u> Move the data from the original source (text file, CSV file) onto the appropriate server via FTP.</p> <p><u>Note:</u> in most cases, the technical staff will be doing the moving of FTP files to appropriate servers.</p>
2	<p>Access the Electronic Prospect Load Process (SRTLLOAD).</p> <p><u>Note:</u> Always run SRTLLOAD in audit mode first to determine the values that are missing in Banner. These values will need to be created in Banner or converted on SOTCNVT (where appropriate) before running SRTLLOAD in update mode.</p>
3	Perform a Next Block function.
4	<p>Enter the desired printer name in the Printer field.</p> <p><u>Note:</u> You can enter <i>DATABASE</i> to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.</p>
5	Perform a Next Block function to navigate to the Parameters Values block.



Section C: Day-to-Day Operations

Lesson: Running the Electronic Prospect Load Process (Continued)

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Procedure, continued

Step	Action
6	Enter the parameters from the tables on the previous pages. <u>Note:</u> List of Values can be accessed by double-clicking on the Search icon.
7	Perform a Next Block function.
8	Select the Save Parameter Set as checkbox if you want to save these parameters for future use.
9	Enter a name and description for your parameters in the Name and Description fields.
10	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.
11	Click the Save icon.
12	Click the Exit icon. <u>Note:</u> If you selected the Submit radio button, the process will run when you save your work.



Section C: Day-to-Day Operations

Lesson: Using the Electronic Prospect Inquiry Form

◀ Jump to TOC

Purpose

The form SRIPREL is used to query and view records in the Search Tape View (SRVPREL). This form is also used in conjunction with the Search Tape Matching Process (SRRSRIN) and the Migrate Electronic Prospects Process (SRRPREL).

If the person is a match, click on the Match button, and you will be returned to SRIPREL. If the person is new, set the Override (Status) to *N* and click the Save icon. You may then exit back to SRIPREL. If the record is new click CREATE NEW icon. If the record is a match, click the SELECT ID icon.

The new match status, either **New** or **Matched**, is displayed under that person's record on SRIPREL. When you exit the form or re-query against the data in the SRVPREL view, these highlighted values disappear, and the Status Match field is updated appropriately.

Use the Create item in the Options Menu to create Banner records individually. Or, you can use the Migrate Electronic Prospects Process (SRRPREL) load those records with a match status of either *N* (New) or *M* (Match) to Banner production.

All fields on this form are searchable and can be used in combination to locate specific tape loads or populations.

Overview of process

Using the Electronic Prospect Inquiry Form (SRIPREL), you can search on the following fields: prospect ID, last name, first name, m(iddle) i(nitial), prospect code, tape ID, status match, status load, street1, ZIP, high sch(ool code/name), birth date, and date add(ed). Once a matching record or group of potential matches has been retrieved, you can select a specific record and click on the Detail option from the drop-down menu.

This accesses the Electronic Prospect Detail Form (SRAPREL). This form displays biographic information associated with the search or test score tape record selected on SRIPREL, information about the search tape from which this record was created, test score information, or interest information. Once you are convinced you have the correct person, exit the form to return to the Electronic Prospect Inquiry Form (SRIPREL).



Section C: Day-to-Day Operations

Lesson: Using the Electronic Prospect Inquiry Form (Continued)

◀ Jump to TOC

Banner form

Electronic Prospect Inquiry SRIPREL 7.2

Prospect ID	Last Name	First Name	MI	Prospect Code	Tape ID	Status Match	Status Load
<input type="text"/>							
Street Line 1:	<input type="text"/>	City:	<input type="text"/>	State:	<input type="text"/>	Postal or ZIP Code:	<input type="text"/>
High School:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Birth Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add Date:	<input type="text"/>						
<input type="text"/>							
Street Line 1:	<input type="text"/>	City:	<input type="text"/>	State:	<input type="text"/>	Postal or ZIP Code:	<input type="text"/>
High School:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Birth Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add Date:	<input type="text"/>						
<input type="text"/>							
Street Line 1:	<input type="text"/>	City:	<input type="text"/>	State:	<input type="text"/>	Postal or ZIP Code:	<input type="text"/>
High School:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Birth Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add Date:	<input type="text"/>						
<input type="text"/>							
Street Line 1:	<input type="text"/>	City:	<input type="text"/>	State:	<input type="text"/>	Postal or ZIP Code:	<input type="text"/>
High School:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Birth Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add Date:	<input type="text"/>						

Procedure

Follow these steps to query the Search Tape view to find matches for test score reports.

Step	Action
1	Access the Electronic Prospect Inquiry Form (SRIPREL).
2	<p>You can search on the following fields: Prospect ID, Last Name, First Name, M(iddle) I(nitial), Prospect Code, Tape ID, Status Match, Status Load, Street1, ZIP, High Sch(ool Code/Name), Birth Date, and Date Add(ed).</p> <p><u>Note</u>: Once a matching record or group of potential matches has been retrieved, you can select a specific record and select <u>Detail</u> from the Options menu.</p> <p><u>Note</u>: The <u>Detail</u> option accesses the Electronic Prospect Detail Form (SRAPREL).</p>



Section C: Day-to-Day Operations

Lesson: Using the Electronic Prospect Inquiry Form (Continued)

◀ Jump to TOC

Procedure continued

Step	Action
3	Select Match from the Options menu to go to the Common Matching Entry Form (GOAMTCH). You can only do this if the record's Status Load and Status Match fields are null (indicating that this record has not been matched or loaded). <u>Note:</u> Do this to see if the person already exists in Banner.
4	If necessary, choose a source code for the Matching Source field. <u>Note:</u> This may default in, depending on the setup on GORCMUS.
5	Perform a Next Block function.
6	Data defaults into the Data Entry block form the tape load data. Enter any additional information, as needed. <u>Note:</u> The minimum requirements are last name for a person record; non-person name for a non-person record.
7	Click the Duplicate Check icon or perform a Next Block function to execute the Common Matching algorithm. <u>Result:</u> If an exact match is found, the person and their data will display in the Match tab. The Potential Match tab will only be available if other potential matches are found.



Section C: Day-to-Day Operations

Lesson: Using the Electronic Prospect Inquiry Form (Continued)

◀ Jump to TOC

Procedure, continued

IF	THEN
New	<p>Click Yes to create a new PIDM.</p> <p><u>Result:</u> A new Banner PIDM is created; data from the top block is inserted into the appropriate tables.</p> <p><u>Note:</u> You will be returned to SRIPREL.</p>
Match	<p>Choose either:</p> <ul style="list-style-type: none">• Select ID to select the record and carry it back to the key block of the %IDEN form.• Update ID to update the record with data from top block. <p><u>Note:</u> Clicking Update ID will update the following data, if it has been entered in the Data Entry block:</p> <ul style="list-style-type: none">• SSN/SIN/TIN if it is null in Banner• Date of Birth if it is null in Banner• Gender if it is Unknown in Banner• Address, telephone, and e-mail if the type does not exist for the record. <p>A new sequence for the address will be created if the same type exists but address information is different.</p>



Section C: Day-to-Day Operations

Lesson: Using the Electronic Prospect Inquiry Form (Continued)

◀ Jump to TOC

Procedure, continued

8	Use <u>Create</u> from the Options menu to load the record. <u>Note:</u> You will see a message in the Auto Hint line telling you the 'Load was successful.'
9	Click the Exit icon. <u>Note:</u> Return to SRIPREL and notice that the Load Status field now shows a 'C'. That means that the record was loaded into production.



Section C: Day-to-Day Operations

Lesson: Using the Electronic Prospect Detail Form

◀ Jump to TOC

Purpose

Use the Electronic Process Detail Form (SRAPREL) to view biographical and search or test score tape data for a person that has been loaded into the temporary tables. The form allows you to view all search tape records for this ID that are present in the Search Tape View (SRVPREL). This form is accessed independently or from the Electronic Prospect Inquiry Form (SRIPREL) using the Detail item in the **Options** menu.

Banner form

Electronic Prospect Detail SRAPREL 7.2

ID: Electronic Prospect Code: Tape ID:

Electronic Prospect D... Test Scores and Perc... Materials, Interests, ... Prior Colleges GPA and Course Su... Supplemental Data Ethnicity and Race

Last Name:	<input type="text"/>	Electronic Prospect Code:	<input type="text"/>
Previous Last Name:	<input type="text"/>	Tape ID:	<input type="text"/>
First Name:	<input type="text"/>	Add Date:	<input type="text"/>
Middle Initial:	<input type="text"/>	Load Status:	<input type="text"/>
Suffix:	<input type="text"/>	Match Status:	<input type="text"/>
Gender:	<input type="text"/>	Banner ID:	<input type="text"/>
Birth Date:	<input type="text"/>	Term:	<input type="text"/>
Ethnicity:	<input type="text"/>	Level:	<input type="text"/>
Visa:	<input type="text"/>	Major:	<input type="text"/>
Address Source:	<input type="text"/>	Degree:	<input type="text"/>
Address Type:	<input type="text"/>	Department:	<input type="text"/>
Street Line 1:	<input type="text"/>	Campus:	<input type="text"/>
Street Line 2:	<input type="text"/>	Contact:	<input type="text"/>
Street Line 3:	<input type="text"/>	Source:	<input type="text"/>
City:	<input type="text"/>	High School:	<input type="text"/>
ZIP or Postal Code:	<input type="text"/>	Graduation Date:	<input type="text"/>
State or Province:	<input type="text"/>	Email Address:	<input type="text"/>
County:	<input type="text"/>	Telephone Type:	<input type="text"/>
Nation:	<input type="text"/>	Phone:	<input type="text"/> - <input type="text"/>
Nation of Citizenship:	<input type="text"/>		



Section C: Day-to-Day Operations

Lesson: Using the Electronic Prospect Detail Form (Continued)

◀ Jump to TOC

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Electronic Process Detail Form (SRAPREL).
2	Enter an ID (searched SRIPREL) in the ID field or search for a person that you think has been loaded into the temporary tables. <u>Note:</u> The information in the PREL field will default from the information in the temporary tables.
3	Enter the Tape ID, in the Tape ID field. This information may default.
4	Perform a Next Block function to get to the Electronic Prospect Detail Block.
5	Select the <u>Test Scores and Interest</u> tab to view additional information.
6	Select the <u>Requested Materials</u> tab to view materials requested.
7	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Running the Electronic Match Process

◀ Jump to TOC

Purpose

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

The process runs against all records in SRVPREL that have a match status of null and a load status of null.

This assumes that if you change the Common Matching Rules (GORMCMRL), you are not able to rematch someone on SRVPREL who has already been matched, because the person's match status will no longer be null.

This process sets the match status on SRVPREL to either N (New), M (Matched) or S (Suspense). The S records can be viewed and updated on the Common Matching Entry Form (GOAMTCH), which is accessed from the Electronic Prospect Query Form (SRIPREL).

Banner process

Process Submission Controls - GJAPCTL 7.2

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Submission

Save Parameter Set as Name: Description: Hold Submit



Section C: Day-to-Day Operations

Lesson: Running the Electronic Match Process (Continued)

◀ Jump to TOC

Parameters

Use the information in the table to complete the procedure that follows.

Req?	Parameter	Description
✓	Electronic Prospect Code	Electronic prospect code to determine which records in the Search Tape View (SRVPREL) will be processed. <u>Example:</u> <i>SAT</i> —SAT Test Tape.
	Tape ID	Prospect tape ID code that further defines what records to process.
✓	Report Type	Report type value— <i>E</i> (Error), <i>N</i> (New), <i>M</i> (Match), <i>A</i> (All). <u>Default:</u> <i>A</i>
✓	Auto Load	Enter <i>Y</i> to automatically load new or matched IDs, enter <i>N</i> to do duplicate processing.



Section C: Day-to-Day Operations

Lesson: Running the Electronic Match Process (Continued)

◀ Jump to TOC

Procedure

Follow these steps to run the Electronic Match Process.

Step	Action
1	Run the Electronic Prospect Match Process (SRRSRIN) to determine if a record exists in Banner. <u>Note:</u> This process uses the Common Matching Source entered on STVINFC to select the Common Matching rules defined on GORCMRL. <u>Note:</u> This process uses the rules set up on GORCMRL for the tape type.
2	Enter the desired printer name in the Printer field. <u>Note:</u> You can enter <i>DATABASE</i> to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.
3	Perform a Next Block function to navigate to the Parameters Values block.
4	Enter the parameters from the table on the previous page.
5	Perform a Next Block function.
6	Select the Save Parameter Set as checkbox if you want to save these parameters for future use.
7	Enter a name and description for your parameters in the Name and Description fields.
8	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.
9	Click the Save icon.
10	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Using the Migrate Electronic Prospects Process

◀ Jump to TOC

Purpose

The Migrate Electronic Prospects Process (SRRPREL) is used to create new search or test score records or update existing Banner recruiting or admissions records with any new data source information. SRRPREL processes all search or test score tape records that have a Status Match of N (New) or M (Matched) with an empty Status Load, depending on the entered parameter values. Once a record has been loaded, its load status is set to C (Created).

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

Banner process

Process Submission Controls GJAPCTL 7.2

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
01	Electronic Prospect Code	<input type="text"/>
02	Tape ID	<input type="text"/>
03	Match Status	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

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

Submission

Save Parameter Set as Name: Description: Hold Submit



Section C: Day-to-Day Operations

Lesson: Using the Migrate Electronic Prospects Process (Continued)

◀ Jump to TOC

Parameters

Use the information in the table to complete the procedure that follows.

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

Procedure

Follow these steps to run the Migrate Electronic Prospects Process.

Step	Action
1	Access the Migrate Electronic Prospects Process (SRRPREL).
2	Enter the desired printer name in the Printer field. <u>Note:</u> You can enter <i>DATABASE</i> to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.
3	Perform a Next Block function to navigate to the Parameters Values block.
4	Enter the parameters.
5	Perform a Next Block function.
6	Select the Save Parameter Set as checkbox if you want to save these parameters for future use.
7	Enter a name and description for your parameters in the Name and Description fields.
8	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.
9	Click the Save icon.
10	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Purging Records

◀ Jump to TOC

Purpose

Use the Electronic Prospect Purge Process (SRTPURG) to purge data from the temporary tables based on the following parameters:

- Electronic Prospect Code
- Tape ID
- Term Code
- Level Code
- Date Added (date data was loaded into the temporary tables)
- Match Status
- Load Status
- Date Loaded (date data was loaded to Banner)
- Print Detail on Report
- Run Mode

The **Print Detail on Report** parameter determines what will be included on the report output.

Use the **Electronic Prospect Code** parameter to purge all records associated with a specific search tape (for example, Peterson) or specific tape type (for example, SAT).

Use the **Tape ID** parameter to:

- Purge all records associated with one tape of many received from the same search company (for example, College Board Search tapes). For example, two separate tapes may be requested from student search, one for students in a specific region, and one for students with certain advanced placement exam scores.
- Purge all records associated with a specific test score tape of many received from the same source. For example, if you use different Tape IDs for each tape load such as SAT1, SAT2, and so on, you will be able to purge only those SAT records associated with the Tape ID SAT1 and leave the other SAT records on the temporary tables untouched.

This process is used to delete records from the search or test score tape temporary tables based on the report parameter values. This process allows you to designate which records to purge. All data associated with a search or test score tape record is deleted. This is an optional process.



Section C: Day-to-Day Operations

Lesson: Purging Records (Continued)

◀ Jump to TOC

Banner process

Process Submission Controls: GJAPCTL 7.2

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Submission

Save Parameter Set as Name: Description: Hold Submit

Parameters

Use the information in the table to complete the procedure that follows.

Req?	Parameter	Description
✓	Electronic Prospect Code	Electronic prospect code to determine which records in the Search Tape View (SRVPREL) will be processed <u>Example:</u> SAT—SAT Test Tape
	Tape ID	Prospect tape ID code that further defines what records to process
	Term Code	Term code that will be used if a term code cannot be determined from the high school graduation date on the search or test score tape and the SOTCNVT conversion rules
	Level Code	Level code that will go on the prospect record <u>Example:</u> UG—undergraduate
	Date Added	DD-MM-YYYY
	Match Status	Enter <i>M</i> to select only matched rows, <i>N</i> (New), or <i>A</i> (All).
	Load Status	Enter the load status of the records, <i>C</i> for Created.



Section C: Day-to-Day Operations

Lesson: Purging Records (Continued)

◀ Jump to TOC

Parameters, continued

Req?	Parameter	Description
	Date Loaded	DD-MM-YYYY
	Print Detail on Report	Values: Y (Yes), N (No)
✓	Run Mode	<p>Enter <i>U</i> to update the database; enter <i>A</i> to produce audit report.</p> <p><u>Default:</u> <i>U</i></p> <p><u>Note:</u> Run the process in audit mode to determine what values are missing from Banner (e.g., high school codes, major codes). If these values are not created in Banner and converted using SOTCNVT where appropriate, the value will not be loaded into Banner.</p>

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Electronic Prospect Purge Process (SRTPURG).
2	Enter the desired printer name in the Printer field. <u>Note:</u> You can enter <i>DATABASE</i> to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.
3	Perform a Next Block function to navigate to the Parameters Values block.
4	Enter the parameters from the table on the previous page.
5	Perform a Next Block function.
6	Click the Save Parameter Set as checkbox.
7	Enter a name and description in the Name and Description fields.
8	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.
9	Click the Save icon.
10	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Summary

◀ [Jump to TOC](#)

Let's review

As a result of completing this section, you have

- set up and run the Tape Load Process
- created and/or updated recruiting and/or admissions records through either the batch or individual loading process.

Next step

Now you are ready to utilize recruiting and/or admissions records and continue to process your prospect or admissions records.



Section C: Day-to-Day Operations

Lesson: Self Check

◀ Jump to TOC

Directions

Use the information you have learned in this workbook to complete this self check activity. Match the form to its description by filling in the blank with the correct letter.

Question 1

Place the steps of the Tape Load Process in their correct order.

- _____ Load the tape to a flat file named XXXYYYYY.DAT where XXX=the name of the tape and YYY = processing year.
- _____ Establish the parameters for SRTLOAD on the Process Submission Control Form (GJAPCTL).
- _____ Establish the converted values on the Tape Code Conversion Form (SOTCNVT).

Question 2

Match the form/process names with their functions.

- _____ Electronic Prospect Match
- _____ Electronic Prospect Inquiry
- _____ Migrate Electronic Prospects
- _____ Electronic Prospect Load Process

- a) Those records with a status of suspense can be viewed on this form by running a query on a match status of S.
- b) This process loads data from a search input file or a test score report file to temporary tables.
- c) This is used to determine if a record already exists in Banner for persons in the temporary tables.
- d) This process is run once all suspended records have been updated to either N(New) or M (Matched).



Section C: Day-to-Day Operations

Lesson: Self Check (Continued)

◀ Jump to TOC

Question 3

In preparation for running SRTLOAD, you should:

- a) set up the corresponding INFC code value on STVPREL
- b) set up rules on the Tape Conversion Form (SOTCNVT) for the conversion of the tape load values to the Banner validation table values.

True or False

Question 4

This form allows you to view all search tape records for a certain ID that are present in the Search Tape View (SRVPREL).

- a) Electronic Process Detail (SRAPREL)
- b) Electronic Process Inquiry Form (SRIPREL)
- c) Search Tape View Form (SRVPREL)

Question 5

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

Question 6

This process is used to create new search or test score records or update existing Banner recruiting or admissions records with any new data source information.

Question 7

This process is used to delete records from the search or test score tape temporary tables based on the report parameter values.



Section C: Day-to-Day Operations

Lesson: Answer Key for Self Check

◀ Jump to TOC

Question 1

Put the steps of the Tape Load Process in their correct order:

- 2 Load the tape to a flat file named XXXYYYYY.DAT where XXX=the name of the tape and YYY = processing year.
- 3 Establish the parameters for SRTLOAD on the Process Submission Control Form (GJAPCTL).
- 1 Establish the converted values on the Tape Code Conversion Form (SOTCNVT).

Question 2

Match the form/process names with their functions.

- c) Electronic Prospect Match
 - a) Electronic Prospect Inquiry
 - d) Migrate Electronic Prospects
 - b) Electronic Prospect Load Process
-
- a) Those records with a status of suspense can be viewed on this form by running a query on a match status of S.
 - b) This process loads data from a search input file or a test score report file to temporary tables.
 - c) This is used to determine if a record already exists in Banner for persons in the temporary tables.
 - d) This process is run once all suspended records have been updated to either N(New) or M (Matched).

Question 3

In preparation for running SRTLOAD, you should:

- a) set up the corresponding INFC code value on STVPREL
- b) set up rules on the Tape Conversion Form (SOTCNVT) for the conversion of the tape load values to the Banner validation table values.

True



Section C: Day-to-Day Operations

Lesson: Answer Key for Self Check (Continued)

◀ Jump to TOC

Question 4

This form allows you to view all search tape records for a certain ID that are present in the Search Tape View (SRVPREL).

- a) **Electronic Process Detail (SRAPREL)**
- b) Electronic Process Inquiry Form (SRIPREL)
- c) Search Tape View Form (SRVPREL)

Question 5

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

Electronic Match Process

Question 6

This process is used to create new search or test score records or update existing Banner recruiting or admissions records with any new data source information.

Migrate Electronic Prospects Process

Question 7

This process is used to delete records from the search or test score tape temporary tables based on the report parameter values.

Prospect Purge Process



Section D: Reference

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

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

Section contents

Overview	Error! Bookmark not defined.
Setup Forms and Where Used	Error! Bookmark not defined.
Day-to-Day Forms and Setup Needed.....	Error! Bookmark not defined.
Forms Job Aid	Error! Bookmark not defined.



Section D: Reference

Lesson: Setup Forms and Where Used

◀ Jump to TOC

Guide

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

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Electronic Prospect Validation Form	STVPREL	Electronic Prospect Load	SRTLOAD
		Electronic Prospect Match	SSRSRIN
		Migrate Electronic Prospects Process	SRRPREL
		Electronic Prospect Inquiry Form	SRIPREL
		Electronic Process Detail Form	SRAPREL
		Electronic Prospect Purge Process	SRTPURG
Electronic Data File and Tape Validation Form	STVTAPE	See above	
Tape Field Names Validation Form	STVTPFD	See above	
Source/Background Institution Code Validation Form	STVSBGI	See above	
Contact Type Code Validation Form	STVCTYP	See above	
Interface Validation Form	STVINFC	See above	
Tape Code Conversion Form	SOTCNVT	See above	
Electronic Admission Application Rules Form	SAAERUL	See above	
Tape Field Position Rule Form	SRATPFD	See above	
Tape File Delimiter Type	SORDLIM	See above	
Tape File Test Score Controls	SRATPTS	See above	
Test Score Percentile Type Validation	STVTSPT	Electronic Prospect Load	SRTLOAD
Electronic Prospects Options Default	SRAPRED	Migrate Electronic Prospects Process	SRRPREL
		Electronic Prospect Inquiry Form	SRIPREL



Section D: Reference

Lesson: Day-to-Day Forms and Setup Needed

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Guide

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

Day-to-Day Form	Setup Forms Needed
Electronic Prospect Load (SRTLOAD)	<ul style="list-style-type: none"> • Electronic Admission Application Rules (SAAERUL) • Electronic Prospect Validation (STVPREL) • Interface Validation (STVINFC) • Tape Field Position Rule (SRATPFD) • Interface Validation (STVINFC) • Electronic Data File and Tape Validation (STVTAPE) • Tape Field Names Validation (STVTPFD) • Source/Background Institution Code Validation (STVSBGI) • Contact Type Code Validation (STVCTYP) • Test Score Percentile Type Validation (STVTSPT) • Tape Code Conversion (SOTCNVT) • Tape Field Position Rule (SRATPFD) • Tape File Delimiter Type (SORDLIM) • Tape File Test Score Controls (SRATPTS)
	<ul style="list-style-type: none"> • <i>Optional</i> Electronic Prospects Options Default (SRAPRED)
Electronic Prospect Match (SSRSRIN)	<ul style="list-style-type: none"> • See above
Migrate Electronic Prospects Process (SRRPREL)	<ul style="list-style-type: none"> • See above
Electronic Prospect Inquiry (SRIPREL)	<ul style="list-style-type: none"> • See above
Electronic Process Detail (SRAPREL)	<ul style="list-style-type: none"> • See above
Electronic Prospect Purge Process (SRTPURG)	<ul style="list-style-type: none"> • See above



Section D: Reference

Lesson: Forms Job Aid

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Guide

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

Form Name	Form Description	Owner
Setup Forms		
STVPREL	Electronic Prospect Validation	
STVTAPE	Electronic Data File and Tape Validation	
STVTFPD	Tape Field Names Validation	
STVSBGI	Source/Background Institution Code Validation	
STVCTYP	Contact Type Code Validation	
STVINFC	Interface Validation	
STVTSPT	Test Score Percentile Type Validation	
SOTCNVT	Tape Code Conversion	
SAAERUL	Electronic Admission Application Rules	
SRATFPD	Tape Field Position Rule	
SORDLIM	Tape File Delimiter Type	
SRATPTS	Tape File Test Score Controls	
SRAPRED	Electronic Prospects Options Default	
Day-to-Day Forms and Processes		
SRTL0AD	Electronic Prospect Load	
SSRSRIN	Electronic Prospect Match	
SRRPREL	Migrate Electronic Prospects Process	
SRIPREL	Electronic Prospect Inquiry	
SRAPREL	Electronic Process Detail	
SRTPURG	Electronic Prospect Purge Process	



Release Date

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This workbook was last updated on 6/1/2006.