

Banner Student Tape Load Processing Training Workbook

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Revision History Log

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April 2008	New version that supports 8.0 software.
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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 download search and test score data loads (tape loads). The workbook is divided into these sections:

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

Course objectives

In this course you will learn how to

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

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

Prerequisites

To complete this workbook, you should have

- completed the Education Practices computer-based training (CBT) tutorial “Banner 8 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.

Process Introduction

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 Banner Student are:

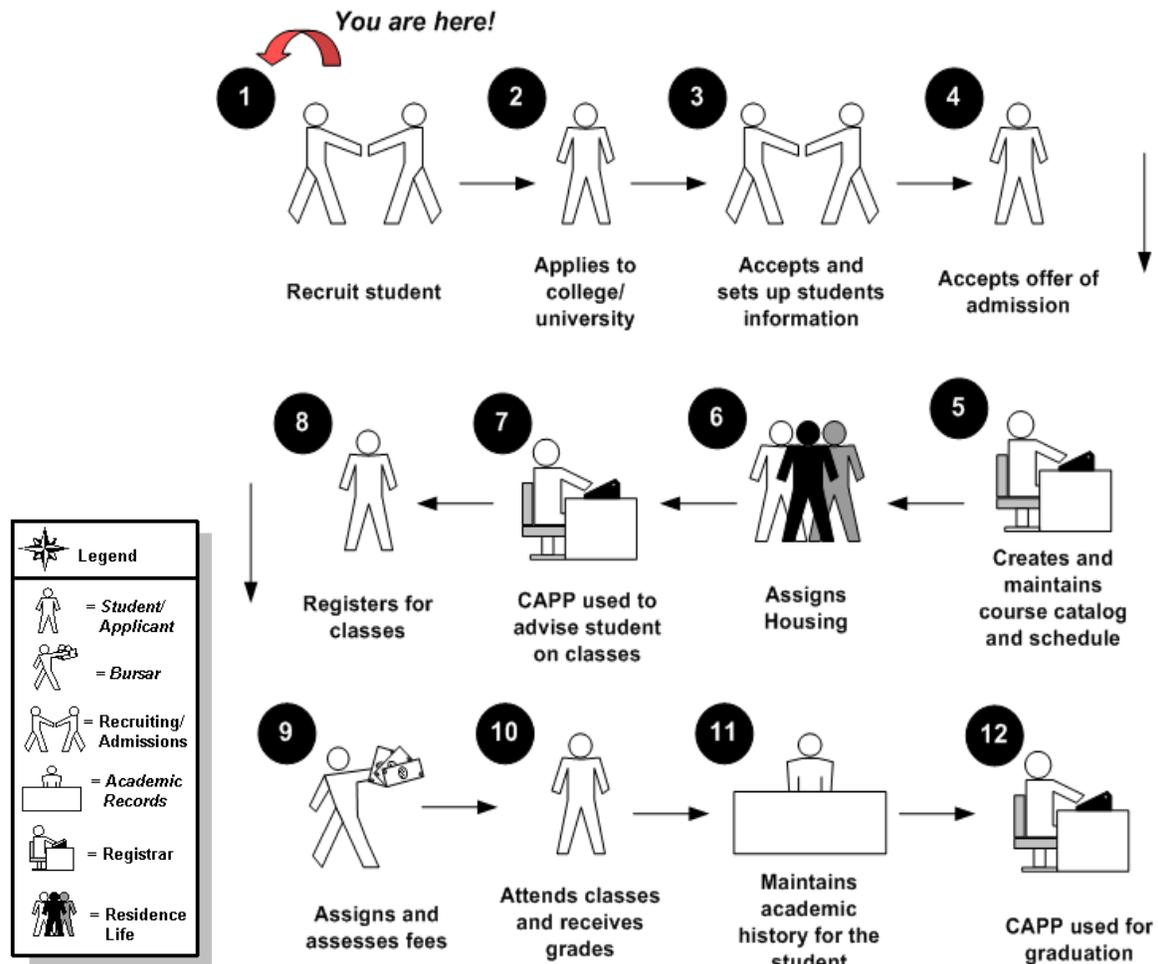
- ACT Tape
- SAT Tape
- SSS Student Search Service
- ACT/EOS Educational Opportunity Service
- PSAT-SSS
- GMAT Tape
- GRE
- Peterson
- PCU Private Colleges and University Search Tape
- AMCAS

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.

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.

Set Up



Section goal

The goal of this section is to outline the setup necessary for tape load processing.

Objectives

In this section you will learn how to identify and update values and rules necessary to maintain tape load processing.

Validation and Rule Forms Used in the Tape Load Processing Module

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

Electronic Prospect Validation Form

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	ACT	<input type="checkbox"/>		21-NOV-2005
EOS_ACT	ACT EOS Search Tape		EOS_ACT	<input type="checkbox"/>		21-FEB-2000
GMAT	GMAT Test Tape		GMAT	<input type="checkbox"/>		14-AUG-2000
GRE	GRE Test Tape		GRE	<input type="checkbox"/>		14-AUG-2000
PCU	Private College Search Tape		PCU	<input type="checkbox"/>		21-FEB-2000
PETERSON	Peterson Search Tape		PETERSON	<input type="checkbox"/>		21-FEB-2000
SAT	SAT Test Tape	SAT	SAT	<input type="checkbox"/>		21-NOV-2005
SAT1	Testing SAT1 Tape Load	SAT	SAT	<input checked="" type="checkbox"/>	SAT1	18-JAN-2007
SSS_SEARCH	Search Tape		SSS_SEARCH	<input type="checkbox"/>		21-FEB-2000
WEB	Web			<input type="checkbox"/>		21-AUG-2006
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Steps

Follow these steps to create a prospect code.

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.

Electronic Data File and Tape Validation Form

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 (SRATPFD).

Examples: PCU, Peterson, etc.

Banner form

The screenshot shows a window titled "Electronic Data File and Tape Validation STVTAPE 8.0 (BAN8_WIN)". Inside the window is a table with three columns: "Tape Code", "Description", and "Activity Date". The table contains the following data:

Tape Code	Description	Activity Date
ACT	ACT Test Score Tape	14-AUG-2000
AMCS	AMCAS Test Score File	26-OCT-2005
AMCS08	AMCAS 2008 Test Score File	29-AUG-2007
EOS_ACT	Educ Opportunity Services	21-FEB-2000
GMAT	GMAT Test Score Tape	14-AUG-2000
GRE	GRE Test Score Tape	14-AUG-2000
PCU	Private College Guide Search	21-FEB-2000
PETERSON	Peterson Search	21-FEB-2000
SAT	SAT Test Score Tape	14-AUG-2000
SAT1	Testing SAT1	18-JAN-2007
SSS_SEARCH	Student Service Search	21-FEB-2000

Steps

Follow these steps to create a tape code.

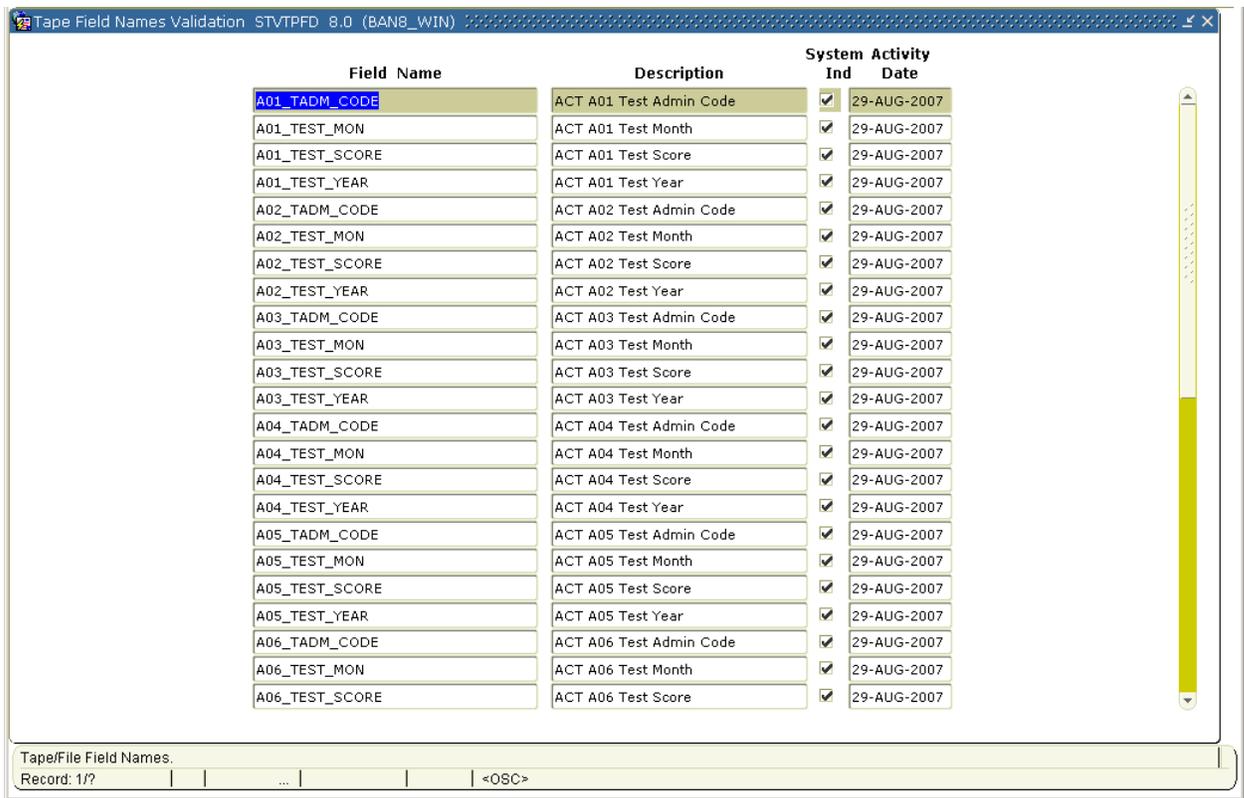
1. Access the Electronic Data File and Tape Validation Form (STVTAPE).
2. Enter a code in the **Tape Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Tape Field Names Validation Form

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 SunGard Higher Education.

Banner form



The screenshot shows a window titled "Tape Field Names Validation STVTPFD 8.0 (BAN8_WIN)". The window contains a table with the following columns: "Field Name", "Description", "System Ind", and "Activity Date". The table lists 24 rows of field names, each with a corresponding description, a checked box in the "System Ind" column, and the date "29-AUG-2007" in the "Activity Date" column. The first row, "A01_TADM_CODE", is highlighted in blue. At the bottom of the window, there is a status bar with the text "Tape/File Field Names." and "Record: 1/?".

Field Name	Description	System Ind	Activity Date
A01_TADM_CODE	ACT A01 Test Admin Code	<input checked="" type="checkbox"/>	29-AUG-2007
A01_TEST_MON	ACT A01 Test Month	<input checked="" type="checkbox"/>	29-AUG-2007
A01_TEST_SCORE	ACT A01 Test Score	<input checked="" type="checkbox"/>	29-AUG-2007
A01_TEST_YEAR	ACT A01 Test Year	<input checked="" type="checkbox"/>	29-AUG-2007
A02_TADM_CODE	ACT A02 Test Admin Code	<input checked="" type="checkbox"/>	29-AUG-2007
A02_TEST_MON	ACT A02 Test Month	<input checked="" type="checkbox"/>	29-AUG-2007
A02_TEST_SCORE	ACT A02 Test Score	<input checked="" type="checkbox"/>	29-AUG-2007
A02_TEST_YEAR	ACT A02 Test Year	<input checked="" type="checkbox"/>	29-AUG-2007
A03_TADM_CODE	ACT A03 Test Admin Code	<input checked="" type="checkbox"/>	29-AUG-2007
A03_TEST_MON	ACT A03 Test Month	<input checked="" type="checkbox"/>	29-AUG-2007
A03_TEST_SCORE	ACT A03 Test Score	<input checked="" type="checkbox"/>	29-AUG-2007
A03_TEST_YEAR	ACT A03 Test Year	<input checked="" type="checkbox"/>	29-AUG-2007
A04_TADM_CODE	ACT A04 Test Admin Code	<input checked="" type="checkbox"/>	29-AUG-2007
A04_TEST_MON	ACT A04 Test Month	<input checked="" type="checkbox"/>	29-AUG-2007
A04_TEST_SCORE	ACT A04 Test Score	<input checked="" type="checkbox"/>	29-AUG-2007
A04_TEST_YEAR	ACT A04 Test Year	<input checked="" type="checkbox"/>	29-AUG-2007
A05_TADM_CODE	ACT A05 Test Admin Code	<input checked="" type="checkbox"/>	29-AUG-2007
A05_TEST_MON	ACT A05 Test Month	<input checked="" type="checkbox"/>	29-AUG-2007
A05_TEST_SCORE	ACT A05 Test Score	<input checked="" type="checkbox"/>	29-AUG-2007
A05_TEST_YEAR	ACT A05 Test Year	<input checked="" type="checkbox"/>	29-AUG-2007
A06_TADM_CODE	ACT A06 Test Admin Code	<input checked="" type="checkbox"/>	29-AUG-2007
A06_TEST_MON	ACT A06 Test Month	<input checked="" type="checkbox"/>	29-AUG-2007
A06_TEST_SCORE	ACT A06 Test Score	<input checked="" type="checkbox"/>	29-AUG-2007

Steps

Follow these steps to create a field name code.

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.

Source/Background Institution Code Validation Form

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.

Banner form

Source or Background Institution	Description	Type	Source Indicator	Admissions Request	Electronic	FICE	Voice Response Message Number
			<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 create a source/background institution code.

1. Access the Source/Background Institution Code Validation Form (STVSBGI)
2. Perform an **Execute Query** function.

Result: The data delivered with this form is displayed.

3. Modify the form if needed.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Steps

Follow these steps to create a contact type code.

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.

Interface Validation Form

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	LORI_MATCH	Lori Match
AMCS	AMCAS Tape Types					26-OCT-2005
FACT	Financial Aid ACT Tape Load	TAPE	A00005	TAP		07-APR-1988
FCSS	Financial Aid CSS Tape	TAPE	A00005	TAP		07-APR-1988
FGAP	GAPSFAS Financial Aid Tape	TAPE	A00005	TAP		07-APR-1988
FPPEL	PELL Financial Aid Tape	TAPE	A00005	TAP		07-APR-1988
GRE	GRE	TAPE	A00005	TAP		13-OCT-1987
SAT	SAT	TAPE	A00005	TAP	LORI_MATCH	Lori Match
SAT1	Testing SAT1	TAPE	050348	HLL	LAST_NAME	Last Name, First Initial, City Match
WEB	Web applications	WEB	A00007	OTH	MV_MATCH	Marian's match

Steps

Follow these steps to create an interface code.

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.

Test Score Percentile Type Validation Form

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"/>	SATURN	26-OCT-2005
S2N	SAT II National College-Bound Percentile	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
SMN	SAT Math National College-Bound Percentile	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
SMS	SAT Math State College-Bound Percentile	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
SVN	SAT Verbal National College-Bound Percentile	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
SVS	SAT Verbal State College-Bound Percentile	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
SWN	SAT Writing National College-Bound Percentile	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
SWS	SAT Writing State College-Bound Percentile	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

Steps

Follow these steps to create a test score percentile code.

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.

Note: 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.

Tape Code Conversion Form

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

The screenshot shows a software window titled "Tape Code Conversion SOTCNVT 8.0 (BAN8_WIN)". At the top, there are three fields: "Interface Type:" with a dropdown arrow, "Validation Table Name:" with a text input box, and "Copy Values:" with a button icon. Below these is a large table with four columns: "Table Name", "Tape Value", "Conversion Code", and "Description". Each column contains 15 empty input boxes. The "Conversion Code" column has a small dropdown arrow above its first box. To the right of the "Description" column is a vertical scrollbar. At the bottom of the window, a status bar contains the text "Tape Interface Code; press LIST for valid codes." and "Record: 1/1" followed by navigation buttons: "...", "List of Valu...", and "<OSC>".

Steps

Follow these steps to convert a code on an interface tape to a valid Banner value.

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.

Note: 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.

Electronic Admission Application Rules Form

Purpose

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

Note: No rules should be added locally. Rules that will be used in system processing will be delivered by SunGard Higher Education; 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

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

Steps

Follow these steps to create a rule.

1. Access the Electronic Admissions Application Rules Form (SAAERUL).
2. Enter a group code in the **Group** field.

Note: 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.

Steps

Follow these steps to set up the Tape Field Position Rule Form (SRATPFD).

1. Access the Tape Field Position Rule Form (SRATPFD).
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.

Note: 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 Higher Education.

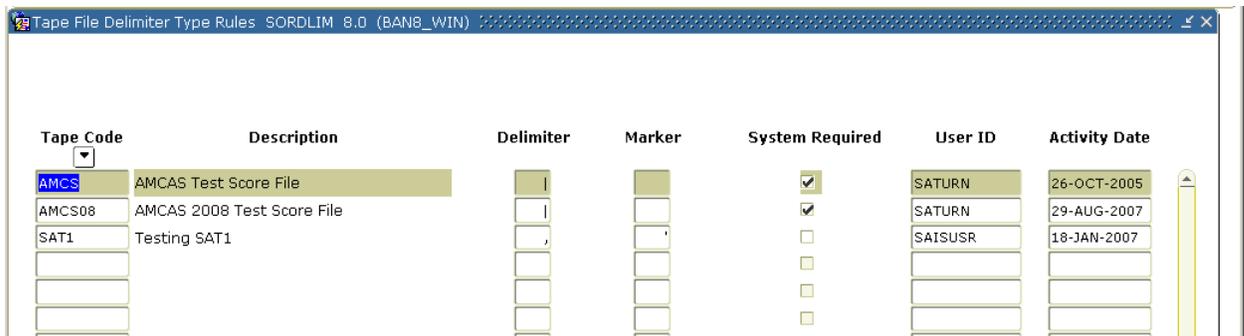
9. Repeat steps 2-7 for each field on the tape.
10. Click the **Save** icon.
11. Click the **Exit** icon.

Tape File Delimiter Type Rules Form

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



The screenshot shows a window titled "Tape File Delimiter Type Rules SORDLIM 8.0 (BAN8_WIN)". The window contains a table with the following columns: Tape Code, Description, Delimiter, Marker, System Required, User ID, and Activity Date. The table has four rows of data, with the first row highlighted in green.

Tape Code	Description	Delimiter	Marker	System Required	User ID	Activity Date
AMCS	AMCAS Test Score File			<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
AMCS08	AMCAS 2008 Test Score File			<input checked="" type="checkbox"/>	SATURN	29-AUG-2007
SAT1	Testing SAT1	,	'	<input type="checkbox"/>	SAISUSR	18-JAN-2007
				<input type="checkbox"/>		

Steps

Follow these steps to assign a delimiter and/or marker to a specific tape code.

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.

Note: Click the **Tape Code** Search icon for the List of Values. The tape code description defaults from the electronic data file and Tape Validation Form (STVTAPE).

4. Enter the delimiter in the **Delimiter** field to indicate a new field on the tape.

Example: A comma is an example of a delimiter.

5. Enter the marker used in addition to the delimiter to enclose the field data in the **Marker** field.

Example: An apostrophe is an example of a marker.

6. Click the **Save** icon.

Note: The User ID and Activity Date will default into their corresponding fields. The **System Required** checkbox indicates if the rule is system required.

7. Click the **Exit** icon.

Tape File Test Score Controls Form

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

The screenshot shows a window titled "Tape File Test Score Controls SRATPTS 8.0 (BAN8_WIN)". The window contains a table with the following columns: Test Code, Description, Test Code Date Origin, System Required, User ID, and Activity Date. The table lists various test codes such as ACT English, ACT Math, GMAT Verbal Score, and MCAT Biological Sci Score. The 'System Required' column contains checkmarks, and the 'User ID' column contains the name 'SATURN'. The 'Activity Date' column shows dates like 24-MAY-2005 and 26-OCT-2005. At the bottom of the window, there is a status bar with the text "Test Code; press LIST for valid values." and "Record: 1/?".

Test Code	Description	Test Code Date Origin	System Required	User ID	Activity Date
A01	ACT English	A01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
A02	ACT Math	A01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
A03	ACT Reading	A01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
A04	ACT Science Reasoning	A01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
A05	ACT Composite	A01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
A06	ACT Sum of Standard Score	A01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
A07	ACT Combined English/Writing	A01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
G01	GMAT Verbal Score	G01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
G02	GMAT Quantitative Score	G01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
G03	GMAT Total Converted Score	G01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
G04	GMAT Writing Score	G01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
G05	GMAT Total Score	G01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
G06	GMAT Verbal Converted	G01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
G07	GMAT Quantitative Converted	G01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
G08	GMAT Writing Converted	G01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005
MBS	MCAT Biological Sci Score	MBS	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
MPS	MCAT Physical Science Score	MBS	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
MVR	MCAT Verbal Score	MBS	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
MWS	MCAT Writing Score	MBS	<input checked="" type="checkbox"/>	SATURN	26-OCT-2005
NAG	ACT Norm Alg/Geometry	A01	<input checked="" type="checkbox"/>	SATURN	24-MAY-2005

Test Code; press LIST for valid values.
Record: 1/? | ... | List of Valu... | <OSC>

Steps

Follow these steps to map a test code.

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.

Note: 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.

Note: 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.

Note: The User ID and Activity Date will default into their corresponding fields.

6. Click the **Exit** icon.

Electronic Options Prospects Default

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

The screenshot shows a web browser window titled "Electronic Prospects Default Options SRAPRED 8.0 (BAN8_WIN)". The form includes the following fields:

- Electronic Prospect Code:** A dropdown menu.
- Clear Defaults:** A button with a trash icon.
- General Default Values:**
 - Level:** Dropdown menu.
 - Recruiting Term:** Dropdown menu.
 - Recruiter:** Dropdown menu.
 - Test Source:** Dropdown menu.
 - Education Goal:** Dropdown menu.
 - Visa Type:** Dropdown menu.
 - Recruit Source:** Dropdown menu.
 - Contact:** Dropdown menu.
 - Student Type:** Dropdown menu.
 - Recruit Type:** Dropdown menu.
 - Admit Type:** Dropdown menu.
 - Recruit Status:** Dropdown menu.
- Curriculum Default Values:**
 - Catalog Term:** Dropdown menu.
 - College:** Dropdown menu.
 - Campus:** Dropdown menu.
 - Program:** Dropdown menu.
 - Degree:** Dropdown menu.
 - Major:** Dropdown menu.
 - Department:** Dropdown menu.

At the bottom of the form, there is a status bar with the text: "Web Electronic Prospect Code; Press LIST for valid values." and "Record: 1/1 | ... | List of Valu... | <OSC>".

Steps

Follow these steps to define a default.

1. Access the Electronic Prospects Default Options form (SRAPRED).
Note: 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 General Default Values and Curriculum Default Values.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Self Check

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. |

Answer Key

- | | | |
|--|----|--|
| 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. |

Day-to-Day Operations



Section goal

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

Objectives

In this section you will learn how to load and process information from outside data sources.

Process Introduction

About the process

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

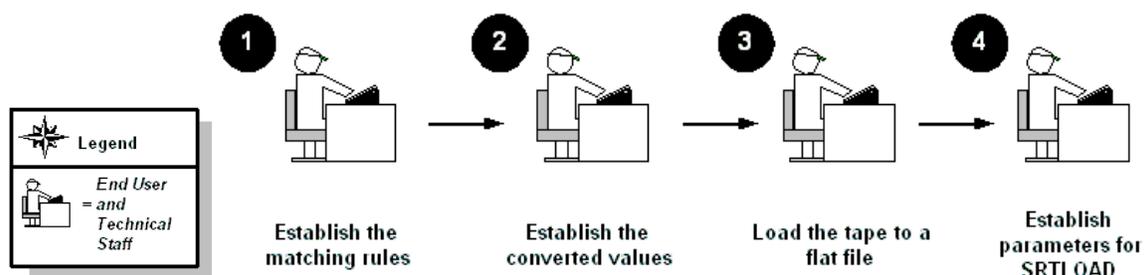
Note: Test score data is loaded onto temporary tables beginning with SRT. Web admissions data is loaded into temporary tables beginning with SAR. Electronic Prospect data is loaded into temporary tables beginning with SOR or SRT.

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



What happens

The table outlines what happens in this process.

Stage	Description
1	Establish the matching rules for each tape type. Note: 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 XXXYYYY.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). Note: Steps 1, 2, 3 and 4 are performed for each tape prior to the tape load job.

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.

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 a Banner record was created or updated for this person using the data in the temporary tables.

Setting Up Tape Load Processing

Loading data

This Electronic Prospect Load Process (SRTLOAD) 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 SRTLOAD, 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	

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.

Running the Electronic Prospect Load Process

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 SRTLLOAD process. Running the Electronic Prospect Load Process (SRTLLOAD) 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, SRTLLOAD 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 form

Number	Parameters	Values
01	Data File Name	/home/pkessiso/satsss.txt
02	Electronic Prospect Code	SSS_WSU
03	Tape ID	PAM
04	AMCAS School Number	
05	SSN or Generated ID	G
06	Term Code	200610
07	Level Code	01
08	Campus Code	1

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

Save Parameter Set as Name: Description: Hold Submit

Destination Printer; DOUBLE-CLICK for available printers, NOPRINT for no printout, DATABASE to review on-line.
Record: 1/1 ... | List of Valu... | <OSC>

Prospect and tape codes by tape type

This table lists the prospect codes from the Electronic Prospect Validation Form (STVPREL) and tape codes from the Electronic Data File and Tape Validation Form (STVTAPE) by tape type.

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

Steps

Follow these steps to run the Electronic Prospect Load Process (SRTLLOAD).

1. Create the data file for loading.

Example: Move the data from the original source (text file, CSV file) onto the appropriate server via FTP.

Note: in most cases, the technical staff will be doing the moving of FTP files to appropriate servers.

2. Access the Electronic Prospect Load Process (SRTLLOAD).

Note: 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.

3. Perform a **Next Block** function.

4. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* 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.

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

6. Enter the parameters, using the table that follows as a guide.

Note: The List of Values can be accessed by clicking the **Values** Search icon.

Parameter	Value
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 the 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	<p>Enter <i>S</i> to use SSN (Social Security Number) on data file; enter <i>G</i> to always generate an ID.</p> <p>Note: If the ID is generated or the incoming data is all zeros (as is the case with some ACT records), the process will display <i>GEN</i> in the ID field on the output report when the report is executed in audit mode; the actual generated IDs will display on the output report when the report is executed in update mode.</p>
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	<p>Level code that will go on the prospect record</p> <p>Example: <i>UG</i> – undergraduate</p>
Campus Code	<p>Campus code that will go on the prospect record</p> <p>Example: <i>M</i> – Main</p>
AMCAS Degree Code	Degree code for the prospect record. This parameter is optional for all tapes except AMCAS.

7. Continue entering the parameter values, using the table as a guide.

Parameter	Value
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.
Contact Code	Contact code that will go on the prospect record. Example: <i>TAP</i> – Test score tape
Source Code	Source code that will go on the prospect record. Example: <i>1008</i> – Alcorn State University
Address Type Code	Address type code for the prospect. Example: <i>PR</i> – permanent
Address Source Code	Address source code for the prospect record.

8. Continue entering the parameter values, using the table as a guide.

Parameter	Value
<p>Telephone Type Code</p>	<p>Default telephone type code for the prospect record. SRTLOAD can process multiple telephone type codes.</p> <p>When SRTLOAD processes multiple phone codes, the telephone type code in the Telephone Type Code parameter is specifically associated with the occurrence of the telephone number on the incoming file.</p> <p>When a value is entered in the Telephone Type Code parameter, it must be preceded by the corresponding occurrence of the telephone number for the associated tape code in SRATPF.D.</p> <p>Warning: SRTLOAD will not run to completion if the number of telephone type codes entered do not match the occurrences of the phone number in SRATPF.D.</p> <p>Examples: The telephone code preceded by "1" for the Telephone Type Code parameter will <i>always only</i> correspond to HOME PHONE (such as <i>1MA</i>). The telephone code preceded by "2" for the Telephone Type Code parameter will <i>always only</i> correspond to MOBILE PHONE (such as <i>2MO</i>).</p>
<p>Email Type Code</p>	<p>Email type code for the prospect</p> <p>Example: <i>CAMP</i> – campus email</p>
<p>Print Test Scores</p>	<p>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</p> <p>Default: <i>Y</i> – Yes</p>
<p>Default Test Month</p>	<p>Default month for the test, if none exists on the input file.</p> <p>Values: <i>01 – 12</i></p>

9. Continue entering the parameter values, using the table as a guide.

Parameter	Value
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 Default: <i>U</i> Note: Run the process in audit mode to determine what values are missing from Banner (e.g., high school codes, major codes). If these values are not created in Banner and converted using SOTCNVT where appropriate, the value will not be loaded into Banner.
Effective Date (AMCAS)	Enter a date to load AMCAS records with an effective date greater than or equal to this date.
PCU Prior College Degree Code	Enter a degree code; the entered degree code will be applied to the prior college record for PCU only.

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

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

Using the Electronic Prospect Inquiry Form

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 the **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. You can also 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, Middle Initial, Prospect Code, Tape ID, Status Match, Status Load, Street1, ZIP, High School, Birth Date, and Add Date**. 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 **Options** 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).

Banner form

Prospect ID	Last Name	First Name	Middle Initial	Prospect Code	Tape ID	Student Type	Match Status	Load Status
							None	None
Street Line 1:		City:		State:		ZIP or Postal Code:		
High School:				Birth Date:				
Add Date:								
Street Line 1:		City:		State:		ZIP or Postal Code:		
High School:				Birth Date:				
Add Date:								

Steps

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

1. Access the Electronic Prospect Inquiry Form (SRIPREL).
2. You can search on the following fields: **Prospect ID, Last Name, First Name, Middle Initial, Prospect Code, Tape ID, Status Match, Status Load, Street1, ZIP, High School, Birth Date, and Add Date.**

Note: Once a matching record or group of potential matches has been retrieved, you can select a specific record and select Detail from the **Options** menu. The Detail option accesses the Electronic Prospect Detail Form (SRAPREL).

3. Select **Match** from the **Options** menu to go to the Common Matching Entry Form (GOAMTCH). You can do this only if the record's Status Load and Status Match fields are null (indicating that this record has not been matched or loaded).

Note: Do this to see if the person already exists in Banner.

4. If necessary, choose a source code for the **Matching Source** field.

Note: This may default in, depending on the setup on GORCMUS.

5. Perform a **Next Block** function.
6. Data defaults into the Data Entry block form the tape load data. Enter any additional information, as needed.

Note: 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.

Result: If an exact match is found, the person and their data will display in the Match tab. The Potential Match tab will be available only if other potential matches are found.

IF	THEN
New	<p>Click Yes to create a new PIDM.</p> <p>Result: A new Banner PIDM is created; data from the top block is inserted into the appropriate tables.</p> <p>Note: 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>Note: 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>

8. Use **Create** from the **Options** menu to load the record.

Note: You will see a message in the Auto Hint line telling you the "Load was successful."

9. Click the **Exit** icon.

Note: Return to SRIPREL and notice that the Load Status field now shows a 'C'. That means that the record was loaded into production.

Using the Electronic Prospect Detail Form

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 8.0 (BAN8)

ID: 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"/>	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"/>	Student Type:	<input type="text"/>
Street Line 3:	<input type="text"/>	Contact:	<input type="text"/>
City:	<input type="text"/>	Source:	<input type="text"/>
ZIP or Postal Code:	<input type="text"/>	High School:	<input type="text"/>
State or Province:	<input type="text"/>	Graduation Date:	<input type="text"/>
County:	<input type="text"/>	Email Address:	<input type="text"/>
Nation:	<input type="text"/>	Telephone Type:	<input type="text"/>
Nation of Citizenship:	<input type="text"/>	Phone:	<input type="text"/> - <input type="text"/>

Identification number; press LIST for name/id search.
Record: 1/1 | ... | <OSC>

Steps

Follow these steps to view a search tape record.

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.

Note: 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 **Test Scores and Interest** tab to view additional information.
6. Select the Requested Materials tab to view materials requested.
7. Click the **Exit** icon.

Running the Electronic Match Process

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 form

Process: SRRSRIN Electronic Prospect Match Parameter Set:

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

Parameter Values

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

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

Submission
 Save Parameter Set as Name: Description: Hold Submit

Destination Printer; DOUBLE-CLICK for available printers, NOPRINT for no printout, DATABASE to review on-line.
Record: 1/1 ... List of Valu... | <OSC>

Steps

Follow these steps to run the Electronic Match Process to determine if a record exists in Banner.

1. Run the Electronic Prospect Match Process (SRRSRIN).

Note: This process uses the Common Matching Source entered on STVINFC to select the Common Matching rules defined on GORCMRL. This process uses the rules set up on GORCMRL for the tape type.

2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* 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, using the table below as a guide.

Parameter	Value
Electronic Prospect Code	Electronic prospect code to determine which records in the Search Tape View (SRVPREL) will be processed. Example: <i>SAT—SAT</i> Test Tape.
Tape ID	Prospect tape ID code that further defines what records to process.
Report Type (if Parm 04 = N)	Report type value— <i>E</i> (Error), <i>N</i> (New), <i>M</i> (Match), <i>A</i> (All). Default: <i>A</i>
Auto Load (Skip Dup Chk)	Enter <i>Y</i> to automatically load new or matched IDs, enter <i>N</i> to do duplicate processing.
Student Type	Enter a student type to process that student type or leave blank to process all student types.

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.

Using the Migrate Electronic Prospects Process

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 form

Process Submission Controls GIAPCTL 8.0 (BAN8)

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
<input type="text" value="01"/>	<input type="text" value="Electronic Prospect Code"/>	<input type="text" value="PAW"/>
<input type="text" value="02"/>	<input type="text" value="Tape ID"/>	<input type="text"/>
<input type="text" value="03"/>	<input type="text" value="Match Status"/>	<input type="text" value="A"/>
<input type="text" value="04"/>	<input type="text" value="Student Type"/>	<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"/>

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

Submission

Save Parameter Set as Name: Description: Hold Submit

Destination Printer; DOUBLE-CLICK for available printers, NOPRINT for no printout, DATABASE to review on-line.
Record: 1/1 ... List of Valu... <OSC>

Steps

Follow these steps to run the Migrate Electronic Prospects Process.

1. Access the Migrate Electronic Prospects Process (SRRPREL).
2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* 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, using the table below as a guide.

Parameter	Value
Electronic Prospect Code	Electronic prospect code to determine which records in the Search Tape View (SRVPREL) will be processed. Example: <i>SAT</i> —SAT Test Tape
Tape ID	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).
Student Type	Enter a student type to process that student type or leave blank to process all student types.

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.

Purging Records

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.

Banner form

Process: SRTPURG Electronic Prospect Purge Parameter Set:

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

Parameter Values

Number	Parameters	Values
01	Electronic Prospect Code	SSS_WSU
02	Tape ID	
03	Term Code	
04	Level Code	
05	Date Added	
06	Match Status	
07	Load Status	
08	Date Loaded	

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

Submission
 Save Parameter Set as Name: Description: Hold Submit

Destination Printer; DOUBLE-CLICK for available printers, NOPRINT for no printout, DATABASE to review on-line.
Record: 1/1 | ... | List of Valu... | <OSC>

Steps

Follow these steps to run the purge process.

1. Access the Electronic Prospect Purge Process (SRTPURG).
2. Enter the desired printer name in the **Printer** field.

Note: You can enter *DATABASE* 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, using the table as a guide.

Parameter	Value
Electronic Prospect Code	Electronic prospect code to determine which records in the Search Tape View (SRVPREL) will be processed Example: <i>SAT</i> —SAT Test Tape
Tape ID	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 Example: <i>UG</i> (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.
Date Loaded	DD-MM-YYYY
Print Detail on Report	Values: <i>Y</i> (Yes), <i>N</i> (No)
Run Mode (A=Audit, U=Update)	Enter <i>U</i> to update the database; enter <i>A</i> to produce audit report. 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. Default: <i>U</i>
Student Type	Enter a student type to process that student type or leave blank to process all student types.

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.

Summary

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.

Self Check

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 XXXYYYY.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).

Question 3

In preparation for running SRTLOAD, 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 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.

Answer Key for Self Check

Question 1

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

- 2 Load the tape to a flat file named XXXYYYY.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:

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

True

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

Appendix



Section goal

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

Forms Job Aid

Form	Full Name	Use this Form to...
STVPREL	Electronic Prospect Validation	used to define the various types of search or test score tapes that are to be loaded.
STVTAPE	Electronic Data File and Tape Validation	used 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 (SRATPFD).
STVTPFD	Tape Field Names Validation	used to define all the possible field names into which search or test score tape data might be loaded.
STVSBGI	Source/Background Institution Code Validation	used to create, update, insert, and delete source/background institution codes. Several forms in the Recruiting, Academic History, and Admissions modules use this form to validate the source/background institution codes. You can create and update these codes only from this form.
STVCTYP	Contact Type Code Validation	used to create, update, insert, and delete recruiting contact type codes, such as Campus Visit, College Night, or Merit List Letter, and so on.
STVINFC	Interface Validation	used to create, update, insert, and delete interface codes, such as ACT, Financial Aid CSS tape, or GRE, and so on. It is also used to assign a matching source code to the interface code in order to define the matching rules to be used with that interface code.
STVTSPT	Test Score Percentile Type Validation	used to create and maintain percentile type codes for use on SOATEST. Currently, SAT and GRE files that are loaded via SRTLOAD/baseline tape load processing use delivered, system-required values on STVTSPT for percentile types.
SOTCNVT	Tape Code Conversion	convert codes on interface tapes to valid Banner values before data is added to the system during the tape load process.

Form	Full Name	Use this Form to...
SAAERUL	Electronic Admission Application Rules	define the rules which are used when processing electronic applications, electronic prospects, and tape loads.
SRATPFD	Tape Field Position Rule	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.
SORDLIM	Tape File Delimiter Type	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.
SRATPTS	Tape File Test Score Controls	map the test code which contains the "date taken" to all the other test codes for which that date taken applies.
SRAPRED	Electronic Prospects Options Default	enter the default recruit values for Web-entered data.
SRTLOAD	Electronic Prospect Load	submit a Banner job or report for processing. You can specify the print settings and parameter values that control processing. You can run the job or report immediately or hold it for later processing from the operating system. Process Submission Control Form (GJAPCTL)
SRRPREL	Migrate Electronic Prospects Process	submit a Banner job or report for processing. You can specify the print settings and parameter values that control processing. You can run the job or report immediately or hold it for later processing from the operating system. Process Submission Control Form (GJAPCTL)
SRIPREL	Electronic Prospect Inquiry	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).
SRAPREL	Electronic Process Detail	view biographical and search or test score tape data for a person that has been loaded to the temporary tables.

Form	Full Name	Use this Form to...
S RTPURG	Electronic Prospect Purge Process	submit a Banner job or report for processing. You can specify the print settings and parameter values that control processing. You can run the job or report immediately or hold it for later processing from the operating system. Process Submission Control Form (GJAPCTL)

Terminology

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.