



Banner Student

Reports

August 24, 2025

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Ellucian
2003 Edmund Halley Drive
Reston, VA 20191
United States of America

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Reports and Processes Introduction

Updated: June 20, 2025

The Banner Student system contains reports and processes that are generated by various modules.

The following are the modules available in the Banner Student system:

- Course Catalog
- Class Schedule
- General Person
- Faculty Load
- Location Management
- Recruiting
- Admissions
- General Student
- Registration
- Academic History

- CAPP

Refer to the [Banner Student CAPP](#) content in *Banner Student Use* for information on CAPP reports and processes.

- Overall

Overall reports and processes are included in the Recruiting and Admissions modules.

The next section includes a list of the Banner Student reports and processes by module with the object name, descriptive name, and job description. The module chapters contain report and process information including: description and purpose, special instructions and notes, and parameter definitions.

Refer to [Job Submission](#) in the *Banner General Use* documentation for instructions on how to run a report or process.

Note: The database instructions apply to on-premises deployments only.

Note: This 9x version corresponds to the Banner Student Reports and Processes 8.35.1 release version.

List of Reports and Processes by Module

Updated: April 17, 2025

Here is a summary of the Banner Student reports and processes.

Object/Module Name	Descriptive Name	Description and Use
Course Catalog		
SCRBULT	Bulletin Report	Used to print the catalog of courses with detail information including text, prerequisites, corequisites, etc.
SCRCATE	Course Catalog Data Extract Process	Used to extract course catalog data and create an XML output file for download or third party use.
SCRRIMS	Course Catalog Extract	Used to extract course data and provide it in an XML format readable to third parties using IMS standards.
Class Schedule		
SSPMFEE	Section Fee Population Process	Examines course/section characteristics defined in SSADFEE, determines applicable sections, and inserts appropriate records in the SSRFEES table.
SSPRDEF	Schedule Open Learning Rule Default Process	Defaults open learning rules for sections, as defined on SOAORUL, for CRNs that have been created after the

Object/Module Name	Descriptive Name	Description and Use
		rules have been established.
SSPSCHD	Schedule Purge	Purges the schedule information.
SSRASTZ	Available Seats to Zero Process	Used to modify the available seats for a CRN by setting the number of available seats to zero.
SSRATSQ	Room Attribute Sequence Update Process	Used to automatically populate the sequence number of the room attribute information in the STVRDEF table.
SSRROLL	Term Roll	Rolls Sections of one term to another term.
SSRSECT	Class Schedule	Lists all sections for given term or part of term or both.
SSRSCMT	Update Building/Room Process	Reads the Scheduler Work Table (SSTSCHW) entries and updates the SSRMEET table with the room assignments generated in Schedule25
SSRSCPR	Schedule Work Table Purge Process	Used to delete Scheduler Work Table (SSTSCHW) data based on the term or campus or both specified in the parameters.
SSRSCRM	Schedule25 Work File Creation Process	Used to create the building, room, partition, department (subject), class descriptor, and control files required to run the scheduling tool.
SSRSCUP	Scheduler Work Table Update Process	Reads the three Schedule25 export files (sortdp.dat, losers.dat, notposs.dat) and

Object/Module Name	Descriptive Name	Description and Use
		updates the existing records in the Scheduler Work Table (SSTSCHW).
SSRTALY	Scheduled Section Tally	Produces detailed list of section information.
SSPSEAT	Section Seat Enroll Update	Updates enrollment counts in the section table (SSBSECT) based on records in the seat assignments tables (SSRSEAT, SSRSEAW).
SSPGSEA	Section Seat Generator	Creates records in the seat assignment tables (SSRSEAT and SSRSEAW) for registration records created before the Seat Assignment feature was enabled for a term.
General Person		
SPRPDIR	Person Directory	Prints all persons by type (recruit, applicant, student, faculty).
Support Services - submodule of General Person		
SERLOAD	Support Services Load Process	Used to create service groups from a user-defined population selection.
Faculty Load		
SIPASGN	Faculty Load Purge	Purges instructional, non-instructional, and workload rules for a term.
SIRASGQ	Faculty Schedule Report	Used to print an instructor's schedule, with detailed information.
SIRCTAL	Faculty Load Contract Analysis Report	Used to calculate the Faculty Load contract analysis.

Object/Module Name	Descriptive Name	Description and Use
SIRTRAL	Faculty Load Term Analysis Report	Used to calculate and print the Faculty Load term analysis.
Location Management		
SLPHOUS	Housing Purge	Purges housing applications, housing, meal plan, and phone assignments for the user specified terms and activity dates.
SLRBACS	ACS Housing Interface	Produces file for ACS HIS for addresses of housing applicants.
SLRDADD	Dormitory Address Creation	Used to create dormitory addresses from the housing assignments.
SLRFASM	Batch Room/M meal/Phone Assessment	Used to assess room, meal, and phone charges in a batch mode.
SLRHLST	Active Housing Assignments Report	Lists all the active housing assignments.
SLRROLL	Assignment Roll Process	Used to roll the term's housing, meal, and phone assignments forward to a future term.
SLRSCHD	Batch Scheduler Report	Used to create housing assignments in batch based on the applicant's preferences.
SLRSCHE	Batch Housing Schedules Report	Processes housing assignments based on information on SLARMAP.
Recruiting		
SRREMAL	Electronic Prospect Email Process	Used for sending out a mass mailing as an email letter to electronic prospects.

Object/Module Name	Descriptive Name	Description and Use
SRRENHR	Rec/Enroll Analysis - How Learned Report	Produces a statistical report of recruits, applicants, and enrollees by a How I Learned code for a term range.
SRRENRL	Recr/Enrl Analysis - Source/Recr Report	Produces a statistical report of recruits, applicants, and enrollees by source and recruiter for a term range.
SRRINQR	Recruits Never Applied to Inst. Report	Prints or deletes all recruits that expressed an interest in the institution but never applied.
SRRPREL	Migrate Electronic Prospects Process	Used to create or update Banner® recruiting records for the records in the Search Tape View (SRVPREL).
SRRRICC	Recruiter Integration Crosswalk Process	Generates academic programs names from existing curriculum data using a defined business rule.
SRRRPRO	Recruiter Prospect Provisioning Process	Used to provision Recruiter with Banner prospects, for further processing in Recruiter.
SRRRVAL	Recruiter Validation Provisioning Process	Used to provision Recruiter with validation codes from Banner to ensure the same validation codes are used in the Recruiter system as in Banner when possible.
SRRSRIN	Prospect Tapeload Matching Process	Used to determine if a match exists between a record on the Search Tape View (SRVPREL) and Banner production data when

Object/Module Name	Descriptive Name	Description and Use
		loading search tape records en masse.
SRTLLOAD	Electronic Prospect Load	Loads data from an input file to temporary tables. Also creates an audit report detailing the status of each record on the input file.
S RTPURG	Electronic Prospect Purge	Used to delete records from the search tape temporary tables and designate which records to purge.
Admissions		
SAPADMS	Admission Purge Report	Purges all the Admission records for a selected term.
SARACTM	Admissions Count by College/ Major	Prints admission application count by college/major.
SARADMS	Admissions Application Report	Prints admissions application report by ID or name and term, application number.
SARAMDP	AMCAS Date Purge	Used to purge the flat file of data that was electronically submitted to AMCAS.
SARAMXF	AMCAS Extract File Process	Used to create a flat file of data to be electronically submitted to AMCAS.
SARBDSN	Admissions Decision Calculation Report	Produces batch automated admissions decision.
SARDCBT	Rating Audit Report	Used to view applications that have been updated on the SAADCBT for a specific date or dates.
SARDCSN	Admissions Decision Criteria Report	Prints admissions decision criteria report and term roll with delete option.

Object/Module Name	Descriptive Name	Description and Use
SAREMAL	Batch Email for Elec. Apps. Process	Used for sending out a mass mailing as an email letter to electronic applicants.
SARETBL	Electronic Application Report	Used to view information about a student's electronic admissions application.
SARETMT	Elec App Verify/Load Process	Used for matching electronic applicants to Banner production records by interface code, and SSN and Last Name, or all criteria.
SARETPG	Electronic App Purge Process	Used to purge old data from the electronic application holding tables by date range, application type, source, and term.
SAR189U	TS189 Upload to Banner	Used to receive an electronic (EDI) admissions application in SPEEDE format and to automate the entry of the admissions application data into the Banner Admissions module.
SARRATE	Admission Calculation Rating Report	Used to calculate the admissions rating for an ID or population.
General Student		
SGPADVA	Advisors Assignment Process	Assigns or replaces a specific advisor to a student, or a group of students in the absence of an advisor.
SGPCOOP	Cooperative Education Purge	Purges all the cooperative education data for all students.
SGPBLCK	Student Block Load Process	Associates a group of

Object/Module Name	Descriptive Name	Description and Use
		students defined through population selection to a block code for an effective term.
SGPHOLD	Hold Purge	Purges all expired holds which exist on the database.
SGPSTDN	General Student Purge	Purges the general student records for any non-registered students.
SGRCHRT	Cohort Load Process	Assigns cohort codes to a group through population selection.
SGRKNOW	Student Right to Know Report	Produces graduation/ completion rates by cohort and sport for race and gender.
SGRSATT	Student Attribute Load Process	Assigns student attribute codes to the people selected from the population selection.
SGRSTDN	Student Report	Prints student list by term in alpha or ID order.
SGRVETN	Veteran Report	Prints veteran list by term.
Registration		
SFPAGRD	Auto Grade Assignment Process	Used to assign an incomplete or institutionally defined letter grade to long-standing, ungraded, open learning registration records.
SFPBLCK	Course Request Load Process	Tracks student populations by block schedule codes for effective and report terms.
SFPCPOS	Course Program of Study Process	Used to identify courses in which a student is registered that count toward the

Object/Module Name	Descriptive Name	Description and Use
		student's program.
SFPENRL	Enrollment Verification Request Purge	Used to purge all previously requested enrollment verification requests.
SFPFAUD	Purge Fee Assessment Audit Process	Used to purge audit history records from the database.
SFPGCEED	Gainful Employment Purge Process	Used to purge records from the SFRGEFM table for an aid year or a batch ID or both.
SFPPROJ	Student Projection Process	Used to take CAPP compliance results, generate list of projected courses, apply filters, verify prerequisites and corequisites, and mark the most probable courses for registration.
SFPREGS	Registration Purge	Purges all registration records for a selected term, in addition to the time status history.
SFPSBPA	Student Block Pre-Assignment Process	Used with Banner 9.x registration to pre-assign a block to a specific student, to multiple students, or to a selected population.
SFPWAIT	Waitlist Enrollment Purge	Purges waitlist enrollment.
SFPWLRO	Waitlist Priority Reorder Process	Used to reorder positions in the waitlist queue based on the rules defined on SOAWLTC.
SFRBWLP	Batch Waitlist Notification Process	Used to produce waitlist notifications by term for new available seats based on entries in the SFRCOLW

Object/Module Name	Descriptive Name	Description and Use
		collector table.
SFRENRL	Enrollment Verification Request	Produces the pre-processed enrollment verification requests.
SFRFASC	Registration Fee Assessment Process	Used to run batch fee assessment.
SFRFEES	Fee Assessment Report	Used to assist in trouble shooting and debugging fee assessment processing.
SFRFFMN	Feedback Monitor Students Process	Used to find students registered for a course in a specific term that are required to be monitored by faculty members.
SFRFFPG	Faculty Feedback Purge Process	Used to purge records for a term and session description for the start and end dates of the session control record.
SFRGEED	Gainful Employment Submittal Process	Deprecated process. Use the Gainful Employment Student Creation (SFPGESG) student batch process.
SFRHCNT	Unduplicated Headcount Report	Prints headcount totals by level and major for a term, for students with a registration status and effective headcount activated.
SFRIBLR	Incomplete Registration Report	Used with Banner 9.x registration to retrieve details of students who have not been successfully registered for all the CRNs in

Object/Module Name	Descriptive Name	Description and Use
		a registration block.
SFRLINK	Unsatisfied Links Report	Produces a list of students who have unsatisfied or missing section links for a term.
SFRNSLC	Clearinghouse Extract Report	Extracts student enrollment information for reporting to the National Student Loan Clearinghouse (NSLC).
SFRRGAM	Registration Admin Messages Report	Tracks registration errors for administrative purposes, checks for in-progress prerequisites errors, views any potential schedule conflicts due to changes in class schedule, finds students who took in-progress prerequisites that may have not met the requirements.
SFRRNOP	Registered, Not Paid Process	Prints/purges all students registered but not paid for a term and their time status history.
SFRSCHD	Student Schedule	Prints student schedule for term.
SFRPINI	Compliance Listener Start Up Process	Initializes the SFRPIPE process to run in the background, listening for Oracle pipe calls to execute compliance for registration prerequisite processing.
SFRPIPE	Compliance Pipe Process	Used as a listening agent for DBMS_PIPE, to initiate compliance to perform prerequisite registration

Object/Module Name	Descriptive Name	Description and Use
		processing.
SFRPRES	Schedule Planning Report	Used to display the number of students expected to be registered in each course for an upcoming term.
SFRSLST	Class Roster	Prints class list for term or part of term.
SFRSSCR	NSLDS SSCR Process	Reads and processes NSLDS Student Status Confirmation Report (SSCR) Roster and Error Notification files.
SFRTMST	Time Status Calculation Update Process	Calculates student enrollment time statuses in batch mode and updates/ inserts time status history records.
Academic History		
SHPTAEQ	Transfer Articulation Purge	Used to purge transfer articulation information.
SHPTRTC	Academic Transcript Request Purge	Used to purge the academic transcript request information.
SHRADVQ	eTranscript Advanced Queue Process	Used as a listening agent for Oracle advanced queue processing for eTranscripts.
SHRASTD	Calculate Academic Standing Report	Used to calculate academic standing for a selected term and group of students.
SHRCATT	Commencement Attendance Report	Used to print ceremony type and attendees, and cap, gown, hood order, pickup, and return information.
SHRCGPA	Calculate GPA (with / without Study Path) Report	Used to calculate GPA (with / without Study Path) for a

Object/Module Name	Descriptive Name	Description and Use
		selected term and group of students.
SHRCINC	Incomplete Grade Process	Used to automatically update incomplete grades to final grades.
SHRCOMM	Commencement Report	Prints camera-ready commencement program report.
SHRCONV	Calculate GPA Conversion Process	Calculates and stores campus GPAs calculated by term and level of the students.
SHRDEGS	Degree Status Update Report	Updates the existing degree status code to a new user-defined degree status.
SHRDEGV	Degree Verification Process	Used to collect degree data for a student at an institution for the NSC.
SHREDII	Electronic Data Interchange Institutions	Used to upload EDI Capable Institution file for matching of FICE codes.
SHREDIP	Upload of EDI Transcript	Used to load transcript data into interim database tables in Banner, after the FLAT130 file produced by EDI.Smart has been uploaded to the host where Banner resides.
SHREDIR	Electronic Data Interchange Reconciliation	Used to reconcile EDI.Smart disposition files with transcript requests in the collector table.
SHREDIY	Electronic Data Interchange Extract	Used to produce Banner transcripts to be sent through EDI.Smart. Reads requests from the collector file and generates the flat file

Object/Module Name	Descriptive Name	Description and Use
		entries for the transcripts along with control and log file entries.
SHRETRN	eTranscript Export Process	Used to produce the eTranscript order output in PDF format. It is also run when a request is sent to the queue by the order status package to process the transcript request.
SHRETRP	Electronic Transcript Upload Purge Process	Used to purge electronic transcript data, after electronic transcripts have been processed in the Banner Student System.
SHRGPAC	GPA (with / without Study Path) Recalculation Report	Used to calculate GPA (with / without Study Path) for selected term for student or population selection.
SHRGRDE	Grade Mailer	Prints grade mailers by type (original, revised, and duplicate).
SHRIACT	IPEDS Total Activity Report	Prints institution's total student activity, required by Dept. of Education.
SHRIAGE	IPEDS Summary by Age Report	Used to produce the summary by age portion of the Fall Enrollment Reports.
SHRICIP	IPEDS Completion Report	Prints parts A, B, C, and D comprising IPEDS Completion Report.
SHRIETH	IPEDS Ethnic Status Report	Prints report by racial/ethnic category, attendance period, level, and sex of student.
SHRIGRS	Graduation Rate Survey Report	Tracks graduation, transfer, and withdrawal rates by

Object/Module Name	Descriptive Name	Description and Use
		cohort and with athletic aid by type of institution for IPEDS reporting.
SHRIOMS	Outcome Measures Report	Collects data for award completion and enrollment status for four undergraduate cohorts at six years and eight years after the students entered the institution.
SHRIPDS	IPEDS File Generation Process	Produces generation extract file, which is used to produce the Fall Enrollment Reports.
SHRIRES	First Time Residency Report	Prints a report on first time student's states of residency.
SHRPESE	PESC/XML Transcript Export Process	Used to create electronic transcripts in XML format by producing a .xml file that can be read by the receiving institution.
SHRPESI	PESC/XML Transcript Import Process	Used to import XML transcript files into an institution from other institutions.
SHRPOST	eTranscript Cloud Post Process	Used to send eTranscript order status to the Ellucian Cloud for paper and PDF transcripts.
SHRPREV	Progress Evaluation Process	Used to determine progress evaluation and combined academic standing codes and print a report of the results.
SHRQINI	eTranscript Listener Start Up	Used to initialize the

Object/Module Name	Descriptive Name	Description and Use
	Process	SHRADVQ listener process to be run in the background, where it listens for Oracle advanced queue calls to execute eTranscripts processing.
SHRROLL	Grade Roll Process	Rolls grades entered on the Class Roster Form and creates Academic History.
SHRROUT	Roll Learner to Outcome Process	Used to roll learner curriculum records to the outcome curriculum and then insert new degree sequence records.
SHRRPTS	Repeat/Equivalency Course Check	Used to flag repeated courses.
SHRTAEQ	Transfer Equivalency Worksheet	Used to review the transfer equivalency for a student.
SHRTCIM	Transfer Catalog Data Import Process	Used to import an XML extract file of course catalog data into a Banner database and compare incoming records with transfer course records in the system.
SHRTECA	Transfer Equivalency Catalog	Provides a listing of transfer courses entered for each institution.
SHRTPOP	Transcript Population Creation Process	Used to select a population from the student body for whom transcripts are to be printed.
SHTRRTC	Academic Transcript	Used to produce an academic transcript.
SHRTYPE	Student Type Update	Used to update the student type after completing the Grade Roll Process.

Object/Module Name	Descriptive Name	Description and Use
CAPP - Refer to the Banner Student CAPP content in Banner Student Use for information on the SM% reports and processes.		
SMPCPRG	Compliance Purge Process	Used to purge compliance records.
SMPCSAP	SAP Purge Process	Used to purge compliance data for satisfactory academic progress.
SMRBCMP	Batch Compliance Process	Creates compliance and hard copy requests from population, or performs outstanding compliance requests and produces outstanding hard copy output. Calls both SMRCMPL and SMRCRLT.
SMRCMPL	Program Compliance Report	Checks courses taken by student against curriculum and program requirements.
SMRCRLT	Compliance Print Process	Prints hard copy compliance output.
SMRRLST	Compliance Rule Report	Produces a list of compliance rules that have been set up at your institution for rule within a rule for areas (SMAAREA) and groups (SMAGROP).
Overall		
SOPAPPT	Appointment Purge Process	Purges all appointment records for specified start and end dates.
SOPLCCV	Learner Curriculum Conversion Process	Used to read the input population and run the curriculum conversion process.
SOPLCPG	Learner Curriculum Purge	Used to purge SORLCUR

Object/Module Name	Descriptive Name	Description and Use
	Process	rows or SORLFOS rows or both for Admissions and Recruiting records.
SOPMAUD	Purge Mass Entry Audit Process	Used to purge mass entry audit information displayed in SOAMAUD and keep the SORMAUD and SOBMAUD table sizes from getting too large.
SOPSATS	SAT Recentering Process	Recenters SAT scores for college board compliance.
SORAINF	Administrator Assignments Process	Allows institutions to use the rules defined on SOAADAS to assign administrators to recruit and applicant records.
SORCPLN	Communication Plan Processing Report	Shows person's movement from old to new communication plan.
SOREMAL	Student Email Process	Used for sending out a mass mailing as an email letter using population selection on IDs.
SORHSRP	Admissions High School Report	Prints totals and percentage for applicants, students, enrollment and GPA.
SORLCHG	Non-Destructive Curric Update Report	Used to show non-destructive updates made to curriculum or field of study records or both.
SORMEBP	Process Mass Entry Report	Used to execute mass entry updates that have been held for job submission processing using the Results window of a mass entry form.

Object/Module Name	Descriptive Name	Description and Use
SORSBSM	Source/Background Summary Report	Used to collect source/background institution summary information similar to what is found on SOASBSM.
SURDELT	Communication Removal Process	Used to perform a mass removal of mail records.
SURLOAD	Communication Load Process	Used to perform a mass entry of mail records.

Course Catalog

Updated: April 17, 2025

Bulletin Report (SCRBULT)

Updated: August 27, 2020

This report is used to print the catalog of courses, with detailed information including descriptive text, prerequisites, corequisites, CAPP area and program requirements, DegreeWorks prerequisites, long course titles and descriptions, and duration information. Courses that are defined as equivalent courses or mutually exclusive courses display that designation on the report.

Use the **Prerequisite Check Method** radio group on the Catalog Prerequisite and Test Score Restrictions Form (SCAPREQ) to select which type of prerequisite requirements will be in effect for the courses listed in the report. The choices are `Basic or None`, `CAPP`, or `DegreeWorks`. The default value is `Basic or None`.

- When the **Prerequisite Check Method** field is set to `Basic or None`, course test score and prerequisite restrictions will be listed for the courses in the report.
- When the **Prerequisite Check Method** field is set to `DegreeWorks` or `CAPP`, DegreeWorks prerequisite requirements or CAPP area prerequisite requirements will be listed for the courses in the report.
- When DegreeWorks is installed, the `CAPP` option is not available.
- When CAPP area prerequisite checking is in use, the `DegreeWorks` option is not available.

Basic prerequisites are displayed when the `SCBCRSE_CAPP_PREREQ_TEST_IND` column is set to `B` for a course and prerequisites exist on SCAPREQ.

The report displays DegreeWorks course prerequisites when DegreeWorks prerequisite checking is in use. The process checks whether the `SCBCRSE_CAPP_PREREQ_TEST_IND` column is set to `D` for a course. It then calls the DegreeWorks Description Service to obtain the prerequisite descriptions scribed in the remarks in the Requisite blocks associated with the course.

Parameter Name	Required?	Description	Values
Academic Year	Yes	Enter the academic year for which you want the report printed.	Academic Year Validation Form (STVACYR)
Print Long Course Title	Yes	Enter Y to print the long course title from SCRSLYN or N to not print the long course title and print the existing course title from the record on SCBCRSE instead. If no long course title is available for the course, the existing information from SCBCRSE will be printed. N is the default.	Y - Print long course title from SCRSLYN N - Print existing course title from SCBCRSE
Print Long Course Description	Yes	Enter Y to print the long course description from SCBDESC or N to not print the long course description and instead print the existing course description from the record on SCRTEXT. If no long course description is available for the course, the existing information from SCRTEXT will be printed. N is the default.	Y - Print long course description from SCBDESC N - Print existing course description from SCRTEXT

Course Catalog IMS Extract Report (SCRRIMS)

Updated: August 27, 2020

This report is used to extract course data and provide it in an XML format readable to third parties using IMS standards. The extract creates the IMS Properties object and the IMS Course Group Data Object.

Parameter Name	Required?	Description	Values
Academic Year	Yes	Enter the academic year for which course catalog information should be extracted.	Academic Year Validation Form (STVACYR)

Course Catalog Data Extract Process (SCRCATE)

Updated: August 27, 2020

This Java process is used to extract course catalog data and create an XML output file of that data.

About this task

An institution can post the output file on an unsecured page of its website where people seeking the data can download it to their workstations. Similarly, the output file can be sent to a third-party organization that hosts a Web-based repository of course catalog data. This process calls the `SP_CATALOG_EXPORT` process API.

The XML output file for the extract process includes the fields listed in the table below. The HTML output file for the extract contains a subset of those fields such as subject, course number, and course short title. Additional fields can be included in the HTML file by modifying the stylesheet template. The stylesheet can be configured at your institution to display the fields you choose. To modify the stylesheet, do the following:

Procedure

1. Extract the stylesheet using the command: `jar -xvf scrcate.jar`

bwckctlg.xml

2. Modify the stylesheet to display the selected fields in the HTML file.
3. Upload the modified stylesheet using the command: `jar -uvf srcate.jar bwckctlg.xml`

Results

Until a standard schema for the XML file has been adopted by the Postsecondary Electronic Standards Council (PESC), the following fields will comprise the extract file.

XML Field	Table Column	Additional Information
<i>Header Record Information</i>		
<Organization>	<i>Complex element made up of the items below</i>	
<FICE>	SHBCGPA_INST_FICE	Defined on SHACTRL
<OPEID/>		
<OrganizationName>	GUBINST_NAME	Defined on GUAINST
<Contacts>	<i>Complex element made up of the Address and Phone complex elements</i>	
<Address>	<i>Complex element made up of the items below</i>	
<AddressLine>	GUBINST_STREET_LINE1	Defined on GUAINST
<AddressLine>	GUBINST_STREET_LINE2	Defined on GUAINST
<AddressLine>	GUBINST_STREET_LINE3	Defined on GUAINST
<City>	GUBINST_CITY	Defined on GUAINST
<StateProvince>	GUBINST_STAT_CODE	Defined on GUAINST
<PostalCode>	GUBINST_ZIP	Defined on GUAINST
<CountryCode>	GUBINST_NATN_CODE	Defined on GUAINST
<Phone>	<i>Complex element made up of the items below</i>	
<AreaCityCode>	GUBINST_PHONE_AREA	Defined on GUAINST
<PhoneNumber>	GUBINST_PHONE	Defined on GUAINST
<PhoneNumberExtension>	GUBINST_PHONE_EXT	Defined on GUAINST
<i>Course Detail Record Information</i>		
<CourseSubjectAbbreviation>	SCBCRSE_SUBJ_CODE	Defined on SCACRSE

XML Field	Table Column	Additional Information
>		
<CourseNumber>	SCBCRSE_CRSE_NUMB	Defined on SCACRSE
<CourseAlias>	SCRCALS_CRSE_ALIAS	Defined on SCACRSE
<CourseShortTitle>	SCBCRSE_TITLE	Defined on SCACRSE
<CourseLongTitle>	SCBCRSE_TITLE	Defined on SCACRSE After the PESC schema for course catalog data is finalized, the source for this field will most likely change to the SCRSYLN_LONG_COURSE_TITLE defined on SCASYLB.
<CourseDescription>	SCBDESC_TEXT_NARRATIVE	Defined on SCADETL The precision of this element will likely change when the PESC schema for course catalog data has been finalized.
<CourseEffectiveDate>	STVTERM_START_DATE	The effective date for course is derived from the start date defined for the term code that is assigned as the effective term for the course.
<CourseCreditBasis>	Hardcoded to Regular	This value needed to be set to an enumerated value established for the PESC college transcript schema which uses the same field. Given that Regular was the value hardcoded into the XML transcript export process, it was also selected

XML Field	Table Column	Additional Information
		for this process. This value may be re-evaluated when the PESC course catalog schema is adopted as a standard.
<CourseCreditUnits>	STVTERM_TRMT_CODE or SHBCGPA_TRMT_CODE	The process checks the Term Type value on STVTERM, if it is not defined, it then checks the Term Type value on SHACTRL to retrieve this value.
<CourseCreditMinimumValue>	SCBCRSE_CREDIT_HR_LOW	Defined on SCACRSE
<CourseCreditMaximumValue>	SCBCRSE_CREDIT_HR_HIGH	Defined on SCACRSE
<CourseLevel>	<i>Complex element made up of the items below</i>	
<CourseLevelCode>	SCRLEVL_LEVL_CODE	Defined on SCACRSE
<CourseLevelDescription>	STVLEVL_DESC	Institutional course level codes must be cross-referenced on SOAXREF to one of the enumerated values defined by PESC.
<Attribute>	<i>Complex element made up of the items below</i>	
<RAPCode>	SCRATTR_ATTR_CODE	Defined on SCADETL
<RAPName>	STVATTR_DESC	To be included in the catalog extract, course attributes must be cross-referenced on SOAXREF.

Parameter Name	Required?	Description	Values
Catalog Term	Yes	Enter the catalog term for which courses must be valid to be included in the extract file.	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		To be valid, a course must have a status code with the Active (Indicator) checked on STVCSTA, and the effective term on the SCBCRSE record must be less than or equal to the term code specified for the parameter. Also, the course's end term on SCABASE must be greater than the term code specified.	
Subject	No	Enter the subject codes for the subjects you want to include in the extract file.	Subject Code Validation Form (STVSUBJ)
Course Number (Low)	No	Enter the course number (when combined with the value in the Subject parameter) or the low end of a course range.	
Course Number (High)	No	Enter the high end of a course range. This value is used in combination with the value entered in the Course Number (Low) parameter.	

Parameter Name	Required?	Description	Values
		Because course numbers are character values, specifying a range of 100 - 499 will include values such as 100A, and 1012.	
Course Title	No	Enter a value to limit the records included in the extract file to only those courses with similar titles. The process will append a wildcard (%) to the beginning and end of the value.	
Level	No	Enter the course levels to be included in the extract file.	Level Code Validation Form (STVLEVL)
Schedule Code Type	No	Enter the schedule types to be included in the extract file.	Schedule Type Code Validation Form (STVSCHD)
College Code	No	Enter the college codes to be included in the extract file.	College Code Validation Form (STVCOLL)
Division	No	Enter the division codes to be included in the extract file.	Division Code Validation Form (STVDIVS)
Department	No	Enter the department codes to be included in the extract file.	Department Code Validation Form (STVDEPT)
Credit Hours (Min)	No	Enter the minimum number of credit hours a course must be worth or the low	

Parameter Name	Required?	Description	Values
		end of a credit hour range.	
Credit Hours (Max)	No	Enter the maximum number of credit hours a course must be worth or the high end of a credit hour range.	
Course Attributes	No	<p>Enter the course attributes for the courses to be included in the extract file.</p> <p>If multiple values are specified, the process will treat the relationship between the attributes entered as an OR condition.</p>	Attribute Validation Form (STVATTR)
Include Attributes	Yes	Enter Y to include course attributes in the extract file, or enter N to not include the attributes. The default is Y.	<p>Y - Include attributes</p> <p>N - Do not include attributes</p>
Limit Course Attributes	Yes	Enter Y to include course attributes in the extract file that are cross-walked on SOAXREF, or enter N to include all course attributes in the file. The default is Y.	<p>Y - Include cross-walked attributes</p> <p>N - Include all attributes</p>

Parameter Name	Required?	Description	Values
		Banner values for course attributes must have electronic values defined on SOAXREF.	
Include Course Description	Yes	Enter Y to include course descriptions in the extract file, or enter N to not include the descriptions. The default is Y.	Y - Include descriptions N - Do not include descriptions

Curriculum Mapping

Updated: August 27, 2020

Data migration from Staging tables to Electronic Admissions Application tables (SARSTML) process

Updated: June 16, 2022

The SARSTML process allows you to push data from the Ethos Staging Tables to the Electronic Admission Tables for admissions processing. You can also load changed biographic and demographic information for existing admission records to the target Banner tables to maintain the latest updates for candidates.

To proceed with the SARSTML process, ensure the following:

- To run the SARSTML process, you must first create the curriculum mapping rules in the Curriculum Mapping (SOACMAP) page for the academic year to map the incoming DfE applications curricula to Banner curricula.
- You must assign each rule to a term within that academic year.
- Any terms that you use in the SOACMAP page should be set up in the SOATERM page before you associate the term with a curriculum mapping rule.
- As per the program and majors that you assign in the SOACMAP page, the curricula rules and the associated major rules should exist in the SOACURR page.
- The Provider Code and the Campus fields must have a valid value in the SOAXREF page, for the STVSBGI and STVCAMP labels, respectively.

The Ethos Staging Tables comprises data coming from Ethos APIs and resides in the following distinct tables:

- Ethos Admissions Staging (SAREAAS) table
- Ethos References Staging (SAREARS) table
- Ethos Work Experience Staging (SAREAES) table
- Ethos Qualifications Staging (SAREAQS) table

The SARSTML process pushes the application data from the staging tables to the Electronic Admissions tables, for candidates without any admissions records that exist. The SARSTML process uses the following validations.

- Validates if there are any entry curriculum for application is established in SOACMAP.
- Validates if the **Name** field exists in application.
- Validates if the **City** field exists in application; if not, passes the dot (.) value.
- Validates if the application is already loaded to the target admissions tables in Banner by the SARETMT or SAAEAPS processes.

The SARSTML process uses the following parameters.

Parameter Name	Required	Description	Values
Run Mode (A=Audit, U=Update)	Yes	Enter A for Audit mode or U for Update mode	
Application ID	No	Enter the Application ID of applicant	
Academic Year	Yes	Enter the year to which applications should be pushed to EA tables	STVACYR

Note: Execute the process in Update Mode (U) for applications that you want to push to EA tables.

You can leave the Applicant ID as blank. In such cases, all applications pertaining to specified academic year (not already pushed) are loaded to the EA tables.

How the SARSTML process functions

When you run SARSTML, the process functions in the following ways.

- The process loads the maximum sequence application number for all applications to the EA tables. After the process loads an application to the EA tables, the SAREEAS_PROCESS_IND is set to Y.
- For applications already available in the EA tables without admissions records, there can be a new sequence for the application available in staging. The SARSTML process replaces the existing data from EA with the latest application information from staging.

- For applications with the existing admission records, any changed biographic or demographic data (changes to name, telephone number, email address, and other candidate information) for DfE candidates is directly loaded to the target tables in Banner from staging.

Note: The `dfe-applications-submission-api` handles the changes to the curricula. The SARSTML process does not update the admissions curricula for applications.

- After a download of the defer status and updates for applications, the SARSTML process loads the defer attributes for the applications to the SAAQUAN page.
- After institutions reinstate DfE applications, by applying the confirmed deferred offer decision to the current recruitment year, Ellucian recommends that you download the application updates from DfE to staging. On running the SARSTML process after the application updates download for the applied course year, the SARSTML process creates new applications in the EA tables. The new application from the SARSTML process is available for the term code that is mapped to the application's offer course start date and offer curricula. You can now verify the new applications that the SARSTML process creates in the SAAETBL page.

Note: To create the offer start date to term code mappings, use the SOAXREF page for the STVTERM identifier and create mappings. Refer to the Term Codes section under setup Crosswalk Rules for more

Ensure that you set up all the DfE courses correctly for all term codes, that you require to create admissions applications.

If institutions do not download the updates after an confirm deferred offer, the SARSTML process will not create the new application.

- The SARSTML process loads the phone numbers from Staging to the SARPHON table in the required EA format to avoid truncation of digits in the Common Matching Entry (GOAMTCH) page.
- The SARSTML process derives the Banner Campus Code from the concatenated campus codes that are set up in the SOAXREF page. The process creates applications in EA for the appropriate Banner curricula as defined in the SOACMAP page.

Telephone/email rules

The following are the rules that the SARSTML process follows to update the target tables with the changed telephone/email information.

- **DFEINACTIVETELE:** The DFEINACTIVETELE rule for DFEG rule group determines if the previous telephone numbers for applicants in the SPRTELE table is to be updated as Inactive, when a telephone number update comes for the candidates from DfE. Institutions can set it up as Y or N.

Note: If set to Y, the previous telephone number records in the SPRTELE table for candidates are updated to inactive and not primary, while the latest telephone number is inserted as active and primary.

Previous SPRTELE record gets updated with `SPRTELE_STATUS_IND = 'I'` and `SPRTELE_PRIMARY_IND = 'null'`. The new telephone record in SPRTELE is inserted with the latest telephone number where `SPRTELE_STATUS_IND = null` and the `SPRTELE_PRIMARY_IND = 'Y'`.

If set to N, the old telephone number records in SPRTELE is not updated to inactive, it is just updated as not primary, while the latest telephone number is inserted as active and primary.

Previous SPRTELE record gets updated with `SPRTELE_PRIMARY_IND = 'null'`, while `SPRTELE_STATUS_IND = 'null'` and the new record in SPRTELE is inserted with latest phone where `SPRTELE_STATUS_IND = null` and update `SPRTELE_PRIMARY_IND = 'Y'`.

- **DFEINACTIVEMAIL:** The DFEINACTIVEMAIL rule for DFEG rule group determines if the previous email records for candidates in the GOREMAL table is to be updated as Inactive, when an email address update comes for candidates from DfE. Institutions can set it up as Y or N.

Note: If set to Y, then the previous email records in GOREMAL for candidates are updated to inactive and not preferred, while the latest email is inserted as active and preferred.

Previous record is updated with `GOREMAL_STATUS_IND = 'I'` and `GOREMAL_PREFERRED_IND = 'N'` and the new email record in GOREMAL is inserted with `GOREMAL_STATUS_IND = 'A'` and `GOREMAL_PREFERRED_IND = 'Y'`.

If set to N, then the old email in GOREMAL is not updated to inactive, it is just updated as not preferred, while the latest email is inserted as active and preferred.

Previous record is updated with GOREMAL_PREFERRED_IND = 'N', while GOREMAL_STATUS_IND remains active (A). The new email record in GOREMAL is inserted with GOREMAL_STATUS_IND = 'A' and GOREMAL_PREFERRED_IND = 'Y'.

SARSTML process output

For the admissions processing, the SARSTML output for applications is loaded to the EA tables. The application information is inherent in the Electronic Admissions Processing, and a Web ID and AIDM gets generated per applicant. For candidates with existing admission records, any changed biographic and demographic data, candidate application information is loaded to the target Banner tables directly.

Executing the SARSTML process, generates the `sarstml.log` and `sarstml.lis` files as output files. The `sarstml.log` file records the outcome of the SARSTML job run.

For admissions processing, if the applications are pushed to EA tables successfully on executing the SARSTML process, the `sarstml.log` records the AIDM generated for applicants. The `SAREAAS_PROCESS_IND` column is updated to 'Y' denoting application is loaded to EA successfully.

If applications are not pushed to EA tables due to validation errors, the errors encountered gets displayed in the `sarstml.log` file. The `SAREAAS_PROCESS_IND` column is updated to 'N' denoting that the application is not pushed.

Institutions can manually correct the push errors encountered for applications in the `sarstml.log` and execute the SARSTML process again.

Note: If you encounter ORA errors (Oracle errors) for an application (for example, where incoming data type/field length is not matching the EA data type/field length), the SARSTML process aborts the subsequent applications processing. The `sarstml.log` file contains the ORA errors.

The SARSTML process calls the existing baseline packages to update the candidate information. Institutions can view the changed information on the SPAIDEN page. The following are the package details:

- `gb_identification`: Name changes to the SPRIDEN table
- `gb_bio`: – DOB change to the SPBPERS table
- `gb_address`: Address changes to the SPRADDR table

- `gb_email`: Email changes to the GOREMAL table
- `gb_telephone`: Telephone changes to the SPRTELE table

Note: Updates to the SARQUAN table gets loaded directly and are displayed in the SAAQUAN page. The SARSTML process also loads the Nationality, Ethnicity, and Disability Data to the GORPISD table to facilitate HESA reporting.

- The SARSTML process creates new applications for the mapped term code and curricula. These new applications are for the applications that are deferred previously, and are now confirmed in the next recruitment cycle year.
- The SARSTML process will not create applications and validation errors that appears in the `sarstml.log` file, if the term code mapping does not exist in the SOAXREF page for STVTERM identifier and curricula mappings that do not exist in SOACMAP.

The SAREAAS_PROCESS_IND process indicator field denotes the following:

Name	Description
SAREAAS_PROCESS_IND = 'N'	Indicates that applications are not pushed to EA tables
SAREAAS_PROCESS_IND = 'Y'	Indicates that applications are pushed to the EA tables
SAREAAS_PROCESS_IND = 'O'	Indicates applications status as Offer
SAREAAS_PROCESS_IND = 'R'	Indicates applications status as Recruited
SAREAAS_PROCESS_IND = 'J'	Indicates applications status as Rejected
SAREAAS_PROCESS_IND = 'P'	Indicates applications status as Pending Conditions
SAREAAS_PROCESS_IND = 'W'	Process indicator to indicate applications status as Withdrawn.
SAREAAS_PROCESS_IND = 'F'	Process indicator to indicate applications status as Deferred.

Curriculum Map Rules Roll (SOPCROL) process

Updated: November 04, 2020

The SOPCROL process allows you to roll curriculum mapping rules from one academic year to another.

Note: To run the SOPCROL process, you must have first created the curriculum mapping rules in the Curriculum Mapping (SOACMAP) page for the academic year that you want to copy from. Each rule must be assigned to a term within that academic year.

Any terms used in the SOACMAP page should be set up in the SOATERM page before you associate the term with a curriculum mapping rule. Any curriculum rule should have a program code before you associate the curriculum with a curriculum mapping rule.

When curriculum mapping rules are rolled from one academic year to another, it is expected that terms are created in the 'To Year' that follow the same pattern as terms that are used for rules in the 'From Year'. For example, if rules exist in the year 2020 for the 202010 term and to be rolled to the year 2021, the process attempts to roll the rules to the 202110 term.

If the term calculated for the 'To Year' does not exist in the STVTERM page, the corresponding rule(s) will not be rolled to the 'To Year' and the system displays an error message in the report output.

If the term calculated for the 'To Year' does exist in the STVTERM page, but has not been set up in the SOATERM page, the corresponding rule(s) will only be rolled to the 'To Year', if the value of the 'Roll if no valid term (Y/N)' parameter is Y.

The report output displays messages to indicate that the new term is not in the SOATERM page and whether the rule is copied. If the associated curriculum is OFF for both Recruiting and Admissions, the corresponding rule(s) will only be rolled to the 'To Year' if the value of the 'Roll invalid curriculum (Y/N)' parameter is 'Y'. The report output displays messages to indicate that the curriculum is OFF for those modules and whether the rule has been copied.

If the rule has a part of term and if that same part of term code is not created for the term calculated for the 'To Year', then corresponding rule(s) will not be rolled to the 'To Year' and the system displays an error message in the report output. If the rule in the 'From Year' is not active, then it will not be rolled to the 'To Year' and the system displays an error message in the report output.

If the rule in the 'From Year' is already created in the 'To Year', the rule will not be rolled to the 'To Year' and the system displays an information message in the report output. The process is repeatable. Hence, if the process runs in Update mode with some rules being rolled successfully, you can re-run the process to roll more rules after any necessary corrections.

The output displays information for every rule, whether it has been successfully rolled, rolled with warning, already exists in the 'To Year', or has an error that prevents it from being rolled.

The process has the following parameters.

Parameter Name	Required	Description	Values
From Year	Yes	Enter the year from which curriculum mapping rules are to be rolled.	Academic Year Validation (STVACYR) page
To Year	Yes	Enter the year to which curriculum mapping rules are to be rolled.	Academic Year Validation (STVACYR) page
Run Mode (A=Audit, U=Update)	Yes	Enter A for Audit mode or U for Update mode	
Roll invalid curriculum (Y/N)	Yes	Should a rule be rolled if the curriculum is no longer valid in Recruiting and Admissions?	
Roll if no valid term (Y/N)	Yes	Should a rule be rolled if the term in the To Year is not valid in the SOATERM page?	

Class Schedule

Updated: November 04, 2020

Section Seat Enroll Update Process (SSPSEAT)

Updated: March 17, 2022

The SSPSEAT batch process updates enrollment counts in the section table (SSBSECT) based on records in the seat assignments table (SSRSEAT).

You can run it in sleep/wake mode for a term, or on-demand for a term or term and CRN. The process also removes expired pending seat assignments. Expired pending seat assignments are defined as seat assignment records (SSRSEAT) having a pending status for which there is not a corresponding registration record (SFRSTCR) and where the difference between the assignment date/time and the registration access (SFRRACL) date/time is greater than pending time limit defined on SSASEAT.

When the process is run in sleep wake mode there must be at least one row in the SSRSEAT or SSRSEAW table for the section to be processed. If the last row is deleted, this section will not be selected and reflected in the SSBSECT update. The process can be run in batch mode to be processed.

When running in sleep/wake SSPSEAT uses the union of CRN's that exist in either SSRSEAT or SSRSEAW as the driver to select CRN's for processing. A row must be present in at least one of the two seat assignment tables for an SSBSECT record to be analyzed for enrollment count updates based on registration data.

When running in straight batch mode, the driving table for processing CRN's is SSBSECT. Data does not have to be present in SSRSEAT or SSRSEAW for the parent SSBSECT to be analyzed and have the enrollment counts updated based on registration data

Parameter Name	Required?	Description	Values
Run in sleep wake mode	Y	Run in sleep wake mode option	Y and N Default = N

Parameter Name	Required?	Description	Values
Sleep interval	N	Time in seconds before each polling of seat assignments.	Default = 300
Sleepwake Printer	N	Printer for sleep wake process.	Printer Validation (GTVPRNT) Default = null
Term	Y	Term code of enrollment to poll, enter % for all active terms.	Term Code Validation (STVTERM) Default = null
CRN	N	Update CRN if run in non-sleep wake mode.	Default = null
Process Enrollment	Y	Y/N to process enrollment counts.	Y and N Default = Y
Remove Pending	Y	Y/N to remove expired pending.	Y and N Default = Y

Section Seat Generator Process (SSPGSEA)

Updated: March 17, 2022

The SSPGSEA batch process generates seat assignment records for sections.

You can run the process to generate seat assignment records for sections created before the seat assignment functionality was enabled for the term.

Parameter Name	Required?	Description	Values
Term	Y	Term code of enrollment to	Term Code Validation

Parameter Name	Required?	Description	Values
		poll, enter % for all active terms.	(STVTERM) Default = null
CRN	N	Update CRN if run in non-sleep wake mode.	Default = null
Audit Mode	Y	Enter A (Audit) or U (Update) for run mode.	A and U Default = A

Term Roll Report (SSRROLL)

Updated: December 14, 2023

Use the Term Roll Report (SSRROLL) to roll traditional or open learning sections of one term to another term.

As a pre-requisite to running SSRROLL, the section default rules must be set up in SOAORUL. Some parameters allow you to roll data from the catalog and from the schedule.

Note: When you roll the registration from and registration to dates from the open learning rules on SOAORUL, an error message displays and the process halts if you have not created open learning rules for the new term.

With an ability to roll only traditional, or roll only open leaning sections individually using the **Roll Sections** parameter. If the **Roll CRNs** parameter is run with Y chances that the process will not be able to maintain the same CRN numbers in the **To Term** as the respective CRN number would be already used with the previous SSRROLL run. Significant error message displays against the respective section.

Parameter Name	Required?	Description	Values
Report Term	Yes	Enter the term code for which you want to perform the term	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		roll process.	
From Term	Yes	Enter the starting term code from which you want to roll the section data.	Term Code Validation Form (STVTERM)
To Term	Yes	Enter the ending term code till which you want to roll the section data.	Term Code Validation Form (STVTERM)
Run Mode (A=Audit, U=Update)	Yes	A or Audit mode will print a report of all sections which will be rolled to the selected term. U or Update mode updates and creates the new section records for the selected term. The default run mode is A (Audit mode).	A - Audit mode U - Update mode
Roll Meeting Time	Yes	Enter Y if you want to roll the meeting times for the sections. This parameter also rolls the buildings and rooms associated with the meeting times, if those buildings and rooms exist. The default is Y.	Y - Roll meeting times N - Do not roll meeting times B - Roll meeting times without buildings and rooms
Roll Instructors	Yes	Enter Y if you want to roll the instructors for the sections. Instructors can only	Y - Roll instructors N - Do not roll

Parameter Name	Required?	Description	Values
		be rolled if meeting time information is rolled forward. The default is Y.	instructors
Roll CRNs <ul style="list-style-type: none"> • Y = Roll • N = Oneup 	Yes	<p>Enter Y if you want to roll the CRNs for the sections, or enter N if you want the system to generate a one-up number. The default is Y.</p> <p>If you enter Y, you can roll block schedule codes, links, cross-listed data, and corequisites. If you enter N, you cannot roll block schedule codes, links, cross-listed data, or corequisites.</p> <p>You must roll CRNs to roll corequisites and cross-listed data. If you enter N for Roll CRNs, but you enter Y for Roll Corequisites or the Roll Cross List Data parameters (or both), the Y is ignored, and N is printed as the value for those parameters in the</p>	Y - Roll CRNs N - Generate a one-up number

Parameter Name	Required?	Description	Values
		Report Control information.	
Roll Links	Yes	Enter Y if you want to roll the link information for the sections. The default is Y.	Y - Roll link information N - Do not roll link information
Roll Corequisites	Yes	Enter Y if you want to roll the corequisite information for the sections. The default is Y. You must roll CRNs to roll corequisites and cross-listed data. If you enter N to Roll CRNs, but you enter Y for Roll Corequisites or the Roll Cross List Data parameters (or both), the Y is ignored, and N is printed as the value for those parameters in the Report Control information.	Y - Roll corequisite information N - Do not roll corequisite information
Roll Fees	Yes	Enter Y to roll the fees from the schedule, enter C to roll the fees from the catalog, or enter N not to roll the fees.	Y - Roll fees from the schedule C - Roll fees from the catalog

Parameter Name	Required?	Description	Values
		The default is Y.	N - Do not roll the fees
Roll Degree Attributes	Yes	Enter Y to roll the degree attributes from the schedule, enter C to roll the degree attributes from the catalog, or enter N not to roll the degree attributes. The default is Y.	Y - Roll degree attributes from the schedule C - Roll degree attributes from the catalog N - Do not roll attributes
Roll Text	Yes	Enter Y to roll the text from the schedule, enter C to roll the text from the catalog, or enter N not to roll the text. The default is Y.	Y - Roll text from the schedule C - Roll text from the catalog N - Do not roll text
Roll Class Restrictions	Yes	Enter Y to roll the class restrictions from the schedule, enter C to roll the class restrictions from the catalog, or enter N not to roll the class restrictions. The default is Y.	Y - Roll class restrictions from the schedule C - Roll class restrictions from the catalog N - Do not roll class restrictions
Roll College Restrictions	Yes	Enter Y to roll the college restrictions from the schedule, enter C to roll the college restrictions	Y - Roll college restrictions from the schedule

Parameter Name	Required?	Description	Values
		from the catalog, or enter N not to roll the college restrictions. The default is Y.	C - Roll college restrictions from the catalog N - Do not roll college restrictions
Roll Fld of Study Restrictions	Yes	Enter Y to roll the field of study restrictions from the schedule, enter C not to roll the field of study restrictions from catalog, or enter N not to roll the field of study restrictions. The default is Y.	Y - Roll field of study restrictions from the schedule C - Roll field of study restrictions from the catalog N - Do not roll field of study restrictions
Roll Level Restrictions	Yes	Enter Y to roll the level restrictions from the schedule, enter C to roll the level restrictions from the catalog, or enter N not to roll the level restrictions. The default is Y.	Y - Roll level restrictions from the schedule C - Roll level restrictions from the catalog N - Do not roll level restrictions
Roll Reserved Seats	Yes	Enter Y if you want to roll the reserved seats for the sections. The default is Y.	Y - Roll reserved seats N - Do not roll reserved seats
Roll Cross List Data	Yes	Enter Y if you want to roll the cross list	Y - Roll cross list data

Parameter Name	Required?	Description	Values
		<p>data for the sections. The default is Y.</p> <p>You must roll CRNs to roll corequisites and cross-listed data. If you enter N for Roll CRNs, but you enter Y for Roll Corequisites or the Roll Cross List Data parameters or both, the Y is ignored, and N is printed as the value for those parameters in the Report Control information.</p>	N - Do not roll cross list data
Roll Campus Restrictions	Yes	<p>Enter Y to roll the campus restrictions from the schedule, enter C to roll the campus restrictions from the catalog, or enter N not to roll the campus restrictions. The default is Y.</p>	<p>Y - Roll campus restrictions from the schedule</p> <p>C - Roll campus restrictions from the catalog</p> <p>N - Do not roll campus restrictions</p>
Roll Contract Information	Yes	Enter Y if you want to roll the contract information for the sections. The default is Y.	<p>Y - Roll contract information</p> <p>N - Do not roll contract information</p>
Roll Schedule Override Info	Yes	Enter Y if you want to roll the schedule	Y - Roll schedule overrides

Parameter Name	Required?	Description	Values
		override for the sections. The default is Y.	N - Do not roll schedule overrides
Roll Test Restricts & Pre-reqs	Yes	Enter Y to roll the test score restrictions and prerequisites from the schedule, enter C to roll the test score restrictions and prerequisites from the catalog, or enter N not to roll the test score restrictions and prerequisites. The default is Y.	Y - Roll test score restrictions and prerequisites from the schedule C - Roll test score restrictions and prerequisites from the catalog N - Do not roll test score restrictions and prerequisites
Roll Schedule Evaluation	Yes	Enter Y if you want to roll the schedule evaluation for the sections. The default is Y.	Y - Roll schedule evaluation N - Do not roll schedule evaluation
Roll Block Schedule Codes	Yes	Enter Y if you want to roll the block schedule codes for the sections. The default is Y.	Y - Roll block schedule codes N - Do not roll block schedule codes
Roll CAPP Area or DW Pre-reqs	Yes	Enter Y to roll CAPP or DegreeWorks prerequisite rules from the schedule, enter C to roll CAPP or DegreeWorks prerequisite rules from the catalog, or	Y - Roll prerequisite rules from the schedule C - Roll prerequisite rules from the catalog

Parameter Name	Required?	Description	Values
		enter N not to roll prerequisite rules. The default is Y.	N - Do not roll prerequisite rules
Roll Degree Restrictions	Yes	Enter Y to roll the degree restrictions from the schedule, enter C to roll the degree restrictions from the catalog, or enter N not to roll the degree restrictions. The default is Y.	Y - Roll degree restrictions from the schedule C - Roll degree restrictions from the catalog N - Do not roll degree restrictions
Roll Program Restrictions	Yes	Enter Y to roll the program restrictions from the schedule, enter C to roll the program restrictions from the catalog, or enter N not to roll the program restrictions. The default is Y.	Y - Roll program restrictions from the schedule C - Roll program restrictions from the catalog N - Do not roll program restrictions
Roll Gradable Components	Yes	Enter Y to roll gradable components for a section in one term to the same section in a new term. The default is Y.	Y - Roll gradable components N - Do not roll gradable components
Roll Partition Codes	Yes	Enter Y to roll the partition codes from the schedule, enter C to roll the partition codes from the	Y - Roll partition codes from the schedule C - Roll partition

Parameter Name	Required?	Description	Values
		catalog, or enter N not to roll the partition codes. The default is Y.	codes from the catalog N - Do not roll partition codes
Roll Room Attributes	Yes	Enter Y to roll the cross-room attributes from the schedule, enter C to roll the cross room attributes from the catalog, or enter N not to roll the cross-room attributes. The default is Y.	Y - Roll cross-room attributes from the schedule C - Roll cross-room attributes from the catalog N - Do not roll cross-room attributes
Roll CRN Scheduler Status Code	Yes	Enter Y to roll the CRN scheduler status code or enter N not to roll the code. The default is Y.	Y - Roll the CRN scheduler status code N - Do not roll the CRN scheduler status code
Roll Meeting Time Part Pref	Yes	Enter Y to roll the meeting time partition preferences or enter N not to roll the preferences. The default is Y.	Y - Roll the meeting time partition preferences N - Do not roll the meeting time partition preferences
Roll Meeting Time Room Attrib	Yes	Enter Y to roll the meeting time room attribute preferences or enter N not to roll the preferences. The	Y - Roll meeting time room attribute preferences

Parameter Name	Required?	Description	Values
		default is Y.	N - Do not roll meeting time room attribute preferences
Roll Sub-Components	Yes	Enter Y to roll gradable sub-components for a section in one term to the same section in a new term. The default is N. You can only set this parameter to Y when the Roll Gradable Components parameter is set to Y.	Y - Roll sub-components N - Do not roll sub-components
Roll Section Syllabus	Yes	Enter Y to roll the section syllabus information from the schedule, enter C to roll the section syllabus information from the catalog, or enter N not to roll the section syllabus information. The default is Y. If you enter Y, the records from SSASYLB are created for the new term or CRN.	Y - Roll the section syllabus from the schedule C - Roll the section syllabus from the catalog N - Do not roll the section syllabus
Create Section Rules	Yes	Enter R to roll	R - Roll existing rules

Parameter Name	Required?	Description	Values
		<p>existing rules. Enter D to default to the existing open learning rules defined for the section to the term specified in the To Term parameter. Enter N not to roll or default the rules. The default is R.</p> <p>If you enter R, the existing records in the SSRRSTS, SSRRFND, and SSREXTN tables are copied to the new term. If you enter D, section level rules are created from the existing SOAORUL entries for the new term.</p> <p>As a pre-requisite to running SSRROLL, the section default rules must be set up in SOAORUL.</p>	<p>D - Default open learning rules</p> <p>N - Do not roll or default rules</p>
Roll Student Web Controls	Yes	Enter Y to roll the student web controls from SSBSECC for the section or enter N not to roll the controls. The default is Y .	<p>Y - Roll student Web controls</p> <p>N - Do not roll Web controls</p>

Parameter Name	Required?	Description	Values
Roll Faculty Web Controls	Yes	Enter Y to roll the faculty web controls from SSBFSEC for the section or enter N not to roll the controls. The default is Y.	Y - Roll faculty web controls N - Do not roll web controls
Roll Labor Distribution	Yes	Enter Y to roll the labor distribution FOAPAL elements for the SSACLBD section or enter N not to roll the FOAPAL elements. The default is Y. Note: FOAPAL stands for chart of accounts code entries - Fund, Organization, Account, Program, Activity, and Location.	Y - Roll FOAPAL elements for sections N - Do not roll FOAPAL elements
Roll Department Restrictions	Yes	Enter Y to roll department restrictions from the schedule, enter C to roll department restrictions from the catalog, or enter N not to roll department restrictions. The default is Y.	Y - Roll department restrictions from the schedule C - Roll department restrictions from the catalog N - Do not roll department restrictions
Roll Student Attr	Yes	Enter Y to roll	Y - Roll student

Parameter Name	Required?	Description	Values
Restrictions		student attribute restrictions from the schedule, enter C to roll student attribute restrictions from the catalog, or N not to roll student attribute restrictions. The default is Y.	attribute restrictions from the schedule C - Roll student attribute restrictions from the catalog N - Do not roll student attribute restrictions
Roll Cohort Restrictions	Yes	Enter Y to roll cohort restrictions from the schedule, enter C to roll cohort restrictions from the catalog, or enter N not to roll cohort restrictions. The default is Y.	Y - Roll cohort restrictions from Schedule C - Roll cohort restrictions from Catalog N - Do not roll cohort restrictions
Roll Anonymous Grading Controls	Yes	Enter Y if you want to roll/apply anonymous grading controls for a specific term range; or, enter N if you do not want to roll/apply anonymous grading controls for a specific term, or C to roll from the catalog.	Y - Roll anonymous grading controls. N - Do not roll anonymous grading controls. C - Roll from the catalog.
Campus	No	Enter the campus code for which you want to roll the section data.	Campus Code Validation (STVCAMP) page

Parameter Name	Required?	Description	Values
Part of Term	No	Enter the part-of-term code for which you want to roll the section data.	Part of Term Code Validation (STVPTRM) page
Roll Sections	Yes	Enter: <ul style="list-style-type: none"> • A to roll all sections • T to roll traditional sections. • o to roll open learning sections. The default is A.	<ul style="list-style-type: none"> • A – Roll all sections. • T - Roll traditional sections. • O - Roll open learning sections.

Related concepts

- [Term Roll Report \(SSRROLL\) - Use](#)

Related reference

- [Grading in SCADETL](#)
- [Grading in SSADETL](#)

DegreeWorks Prerequisite Checking and CAPP Area Prerequisite Checking

Updated: August 27, 2020

Use the **Prerequisite Check Method** radio group on the Schedule Prerequisite and Test Score Restrictions Form (SSAPREQ) to select which type of prerequisite requirements will be in effect for the sections listed in the report.

The choices are:

- Basic or None
- CAPP
- DegreeWorks

The default value is Basic or None.

- When the **Prerequisite Check Method** field is set to Basic or None, course test score and prerequisite restrictions will be listed for the sections in the report.
- When the **Prerequisite Check Method** field is set to DegreeWorks or CAPP, DegreeWorks prerequisite requirements or CAPP area prerequisite requirements will be listed for the sections in the report.
- When DegreeWorks is installed, the CAPP option is not available.
- When CAPP area prerequisite checking is in use, the DegreeWorks option is not available.

When DegreeWorks prerequisite checking is in use, the report will either roll the prerequisite checking method and or convert prerequisite checking from a CAPP method to a DegreeWorks method, according to the begin term in PREREQCHK rule on GTVSDAX. This allows you to create the schedule of class sections for terms where DegreeWorks will be used. SSRROLL will not allow the new sections to have a CAPP prerequisite checking method, unless a CAPP area is associated with the section per the Roll CAPP Area or DW Pre-reqs parameter.

Set the PREREQCHK rule to the beginning term code for which you use to use DegreeWorks. When the SSRROLL process is run and the Roll CAPP Area or DW Pre-reqs parameter is used, the process converts the prerequisite checking method for the sections from CAPP to DegreeWorks, based on the parameter setting. You can roll and convert the prerequisite checking method from Catalog or Schedule, or you can choose to not roll the data. Not rolling the data resets the **Prerequisite Check Method** radio group to Basic or None (SCBCRSE_PREREQ_CHK_METHOD_CDE and SSBSECT_PREREQ_CHK_METHOD_CDE set to B).

You can review the settings on GTVSDAX for the PREREQCHK rule after running SSRROLL. When a valid term code is stored in the **External Code** field that is less than or equal to the term code the data was rolled to, the settings should be as follows:

- For CRNs where the SSBSECT_PREREQ_CHK_METHOD_CDE is set to C, the setting is

changed to D.

- For CRNs where the `SSBSECT_PREREQ_CHK_METHOD_CDE` is set to B, the setting remains as it is.

The Roll Test Restricts and Pre-reqs parameter rolls data based on the following conditions.

- When the parameter is set to Y, sections with `SSBSECT_PREREQ_CHK_METHOD_CDE` column set to B are rolled, in addition to any associated test score restrictions and prerequisites.
- When the parameter is set to C, courses with the `SCBCRSE_PREREQ_CHK_METHOD_CDE` column set to B are rolled, in addition to any associated test score restrictions and prerequisites.

The Roll CAPP Area or DW Pre-reqs parameter rolls data based on the following conditions.

- When the parameter is set to Y, sections with `SSBSECT_PREREQ_CHK_METHOD_CDE` column set to C or D are rolled, in addition to any associated CAPP area prerequisites.
- When the parameter is set to C, courses with the `SCBCRSE_PREREQ_CHK_METHOD_CDE` column set to C or D are rolled, in addition to any associated CAPP area prerequisites.
- When the parameter is set to N, the `SSBSECT_PREREQ_CHK_METHOD_CDE` column is set to B.

The following term information is also considered:

- For from and to terms that are before the start term for the `PREREQCHK` rule on GTVSDAX, CAPP prerequisites are rolled.
- For from and to terms that are after the start term for the `PREREQCHK` rule on GTVSDAX, traditional prerequisites or DegreeWorks prerequisites are rolled.
- For terms that straddle the from and to term range, the setting of the `SSBSECT_PREREQ_CHK_METHOD_CDE` column is changed from C to D, and CAPP area prerequisites are dropped from the section.

Calculated Drop Dates and SSRROLL

Updated: June 20, 2024

If you are using Calculated Drop Dates, the setting of the **Roll Meeting Times** parameter affects the meeting time dates that will roll to the copied CRN.

If the Roll Meeting Times parameter is set to Y

If the SSRMEET record includes meeting days, the **Calculated Section Start Date** is determined by evaluating all SSRMEET records and excludes dates defined on SSAEXCL. The **Calculated Section Start Date** is visible on SSAACCL and is a non-database field.

If the SSRMEET record does not include meeting days, the **Calculated Section Start Date** is determined by the section **Part of Term Start Date** and excludes dates defined on SSAEXCL. The **Calculated Section Start Date** is visible on SSAACCL and is a non-database field.

If the Roll Meeting Times parameter is set to N

If the parameter is set to *N*, the meeting times are not rolled to the copied CRN. The **Calculated Start Date** is determined by the **Part of Term Start Date** from the section and excludes dates defined on SSAEXCL. The **Calculated Section Start Date** is visible on SSAACCL and is a non-database field.

Note: If an **Academic Calendar Rule** has been applied to the section on SSAACCL in the **Copy From Term**, SSRROLL will apply the same Academic Calendar Type only when the **Academic Calendar Type** rule has been defined in the **Copy To Term**. If no **Academic Calendar Type** rule is applied to the section on SSAACCL and SOATERM Part of Term Calculated Drop Default dates exist for the same term, the SOATERM POT Calculated Drop Default dates populate the fields accordingly.

If the Roll Meeting Times parameter is set to B

If the parameter is set to *B*, the meeting times are rolled without the buildings (SSRMEET_BLDG_CODE) and rooms (SSRMEET_ROOM_CODE) for the term defined on the **To Term** parameter.

Class Schedule Report (SSRSECT)

Updated: August 27, 2020

This report is used to print the schedule of classes for a term.

The report displays and rolls the following information for use with open learning sections:

- schedule type code description for the section
- instructional method code description assigned to the section
- long course title from the syllabus (if designated)
- meeting type for the meeting time information
- long section title from the syllabus (if designated)

If no meeting time records have been defined for an open learning section, *N/A* is printed on the report, instead of *TBD*.

Parameter Name	Required?	Description	Values
Schedule Term	Yes	Enter the term for which you want the class schedule to be printed.	Term Code Validation Form (STVTERM)
Part of Term (% for all)	Yes	Enter the part of term code for which the schedule of classes is to be printed. Multiple parts of term can be entered, or a % can be used to indicate that all parts of term within the selected term are to be printed.	Part of Term Code Validation Form (STVPTRM)
Order 1-Subj-Course, 2-Coll, Div, Dept	Yes	Enter 1 to print the schedule of classes	1 - Subject, Course order

Parameter Name	Required?	Description	Values
		in subject, course number order, or enter 2 to print in college, division, department order. All sort options create page breaks by campus and part of term.	2 - College, Division, Department order
Campus (% for all)	Yes	Enter the campus code representing the campus for which the schedule is to be printed.	Campus Code Validation Form (STVCAMP)
Course Status (% for all)	Yes	Enter the course status code(s) for the class schedule for which information is to be printed.	Section Status Code Validation Form (STVSSTS)
User Scheduler Results	No	Enter the Y to retrieve meeting time data using the scheduler work data on SSTSCHW or N to retrieve the scheduled data from SSRMEET. The default is N. The scheduler work data is used in place of the schedule data.	Y - Data from SSTSCHW - scheduler N - Data from SSRMEET - schedule
Schedule Type (% for all)	Yes	Enter % for all schedule types, or enter the schedule	Schedule Type Code Validation Form (STVSCHD)

Parameter Name	Required?	Description	Values
		type for the section.	
Instructional Method (% = all)	No	<p>Enter the instructional method for the courses, or enter % for all sections. You may enter multiple values.</p> <p>This parameter is used to report all sections with the same instructional method (such as, Web-based).</p>	Instructional Method Validation Form (GTVINSM)
Print Long Course Title	Yes	<p>Enter Y to print the existing course title from the course record (SCBCRSE) or the long course title from the course syllabus (SCRSYLN).</p> <p>Enter N to not print the long course title. The default is N.</p>	<p>Y - Print existing course title or long syllabus course title (if any)</p> <p>N - Do not print the long course title</p>
Print Long Section Title	Yes	<p>Enter Y to print the existing section title from the section record (SSBSECT) or the long section title from the syllabus record (SSRSYLN). If these are null, the title from the course record (SCBCRSE) will be used.</p>	<p>Y - Print existing section title or long syllabus section title (if any)</p> <p>N - Do not print the long section title</p>

Parameter Name	Required?	Description	Values
		Enter N to not print the long section title. The default is N.	

Scheduled Section Tally Report (SSRTALY)

Updated: August 27, 2020

This report is used to list all sections for a term, with enrollment counts and seats remaining. It can be used for traditional sections or open learning sections.

The output for the sections can be sorted in several ways:

- by subject and course order
- by college, division, and department order
- by department, college, and division order

The report displays the following types of information for the scheduled sections:

- term
- parts of term
- campus
- schedule type
- instructional method
- long course title from the syllabus (if designated)
- meeting type for the meeting time information
- long section title from the syllabus (if designated)

Note: If no meeting time records have been defined for an open learning section, *N/A* is printed on the report, instead of *TBD*.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term for which you want the scheduled sections to be printed.	Term Code Validation Form (STVTERM)
Part of Term (% for all)	No	<p>Enter the part of term code for which the scheduled sections are to be printed. Multiple parts of term can be entered, or a % can be used to indicate that all parts of term within the selected term are to be printed.</p> <p>Leave this parameter blank (Null) to select open learning sections when you do not want to print all parts of term (%). If the report is run from the host, rather than from job submission, enter the word NULL at the parameter prompt to print open learning sections.</p>	<p>Part of Term Code Validation Form (STVPTRM)</p> <p>% - all parts of term</p> <p>Blank - open learning sections</p> <p>NULL - from the host, for open learning sections</p>
Order of Report (VALUES 1, 2, 3)	Yes	Enter 1 to print the scheduled sections in subject, course order, or 2 to print in	1 - Subject, Course order

Parameter Name	Required?	Description	Values
		college, division, department order, or enter 3 to list the scheduled sections in department, college, division order. All sort options break first on the page by campus and part of term.	2 - College, Division, Department order 3 - Department, College, Division order
Campus (% for all)	Yes	Enter the campus code representing the campus for which the scheduled sections are to be printed.	Campus Code Validation Form (STVCAMP)
Instructional Method	Yes	Enter the instructional method for the sections, or enter % for all instructional methods. You may enter multiple values. This parameter is used to report all sections with the same instructional method (such as Web-based).	Instructional Method Validation Form (GTVINSM)
Print Long Course Title	Yes	Enter Y to print the existing course title from the course record (SCBCRSE) or the long course title from the course	Y - Print existing course title or long syllabus course title (if any) N - Do not print the

Parameter Name	Required?	Description	Values
		syllabus (SCRSYLN). Enter N to not print the long course title. The default is N.	long course title
Print Long Section Title	Yes	Enter Y to print the existing section title from the section record (SSBSECT) or the long section title from the syllabus record (SSRSYLN). If these are null, the title from the course record (SCBCRSE) will be used. Enter N to not print the long section title. The default is N.	Y - Print existing section title or long syllabus section title (if any) N - Do not print the long section title

Schedule Purge Report (SSPSCHD)

Updated: June 20, 2025

This report is used to purge class schedule information, in addition to all associated section information, based on term. Schedule information will not be deleted if outstanding registration information exists for the term. It is recommended that the Registration Purge (SFPREGS) be run before running SSPSCHD.

A new summary section history record is created in the table SCRSECT. Columns in this table include: Subject Code, Course Number, Campus, Schedule Type, Term, Number of Sections Offered, Total Enrollment, Total Census Enrollment, and Activity Date, and Part of Term. This history record allows institutions to review the historical course section information in summary format.

Warning! When a third party product is used for scheduling, you may need to rerun the

report before you continue scheduling.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term for which the schedule information is to be purged which has no registration.	Term Code Validation Form (STVTERM)
Run Mode	Yes	Enter: <ul style="list-style-type: none"> • A to print a report of all schedule information that will be purged for the selected term. • U to update the database and purge the schedule information for the selected term. 	<ul style="list-style-type: none"> • A - Audit mode • U - Update mode
Run for Process Term	Yes	<ul style="list-style-type: none"> • If the parameter is N then all the terms that are less than or equal to the process term will be purged, if there is no existing registration. • If the parameter 	<ul style="list-style-type: none"> • Y - Yes • N - No

Parameter Name	Required?	Description	Values
		is Y then the process term will be removed, if there is no existing registration.	
Part of Term	Yes	Enter the part of term code for which the scheduled information is to be purged. You may enter multiple parts of a term, or use a % to signify that all parts within the chosen term are to be purged. This step is required if Purge Sections is set to T. Leave this field empty when Purge Sections is set to A or O.	
Purge Sections	Yes	Enter: <ul style="list-style-type: none"> • A to purge all sections. • T to purge traditional sections. • O to purge open learning sections 	<ul style="list-style-type: none"> • A • T • O

Room Attribute Sequence Update Process (SSRATSQ)

Updated: August 27, 2020

This process is used to automatically populate the sequence number of the room attribute information in the STVRDEF table. This process can be run at your discretion to populate values, resequence existing values, or delete all values.

Parameter Name	Required?	Description	Values
Run Mode	Yes	Enter A to add sequence numbers for attributes, D to delete all existing sequence numbers, or R to resequence the existing sequence numbers. The default is R .	A - Add D - Delete R - Resequence
Sort Code	Yes	Enter A for alpha sort or N for numeric sort. The default is N .	A - Alpha N - Numeric

Schedule25 Work File Creation Process (SSRSCRM)

Updated: August 27, 2020

This process is used to create the building, room, partition, department (subject), class descriptor, and control files required to run the scheduling tool. This process needs to be run a minimum of one time for each scheduling cycle.

Note: Due to the layout constraints of the `datain.dat` file, the duplicate meeting time scenario (handling CRNs with two identical SSRMEET records that do not have a building or room assignment) needs to be considered when this report is run. If the meeting times are adjusted by one minute, a unique meeting time record is created and will be scheduled by Schedule25. Use the exception report produced by SSRSCRM to highlight potential duplication issues and provide notification that adjustments to the meeting records are required.

Note: The term in the section controls (SSACTRL) is treated as an effective term. If a campus code is not entered in the parameters when SSRSCRM or SSRSCUP are run, then the control record for the applicable effective term with no campus code is used as a valid control record. When SSRSCUP is run, it is especially important to use the same control record as was used for SSRSCRM processing if section control values are different from effective term to effective term.

Parameter Name	Required?	Description	Values
Scheduling Term Code	Yes	Enter the extract term code for the file.	Term Code Validation Form (STVTERM)
Scheduling Campus Code	No	Enter the extract campus code for the file.	Campus Code Validation Form (STVCAMP)
Start Date	No	Enter the start date in format MMM-DD-YYYY for the date range to extract meeting times.	
End Date	No	Enter the end date in format MMM-DD-YYYY for the date range to extract meeting times.	
Room Attribute Def Filename	Yes	Enter the room attribute definition filename. The default filename is <code>phys.dat</code> .	
Partition Definition Filename	Yes	Enter the partition definition filename. The default filename is <code>part.dat</code> .	
Subject Definition Filename	Yes	Enter the subject definition filename. The default filename is <code>depts.dat</code> .	

Parameter Name	Required?	Description	Values
Room Definition Filename	Yes	Enter the room definition filename. The default filename is <code>rooms.dat</code> .	
Control Parameters Filename	Yes	Enter the control parameters filename. The default filename is <code>ctrl.dat</code> .	
Class Descriptor Filename	Yes	Enter the class descriptor filename. The default filename is <code>datain.dat</code> .	
Create Work Table	Yes	Enter <code>Y</code> to create the Work table viewable on SSASCHW or <code>N</code> to not create the table. The default is <code>Y</code> .	Y - Create Work table N - Do not create Work table
Control Term Code	Yes	Enter the effective term code for the control record from SSACTRL.	Term Code Validation Form (STVTERM)
Control Campus Code	No	Enter the control campus code from SSACTRL.	Campus Code Validation Form (STVCAMP)
Subject for Inactive Rooms	Yes	Enter the subject code to be used for the creation of inactive room periods.	Subject Code Validation Form (STVSUBJ)

Scheduler Work Table Update Process (SSRSCUP)

Updated: August 27, 2020

This process reads the three Schedule25 export files (`sortdp.dat`, `losers.dat`,

notposs.dat), updating the existing records in the Scheduler Work Table (SSTSCHW). These entries can then be previewed using SSASCHW.

Note: The term in the section controls (SSACTRL) is treated as an effective term. If a campus code is not entered in the parameters when SSRSCRM or SSRSCUP are run, then the control record for the applicable effective term with no campus code is used as a valid control record. When SSRSCUP is run, it is especially important to use the same control record as was used for SSRSCRM processing if section control values are different from effective term to effective term.

Parameter Name	Required?	Description	Values
Control Record Term Code	Yes	Enter the term code for the Work table records to be updated based on the control record entered on SSACTRL.	Term Code Validation Form (STVTERM)
Control Record Campus Code	No	Enter the campus code for the work table records to be updated based on the control record entered on SSACTRL.	Campus Code Validation Form (STVCAMP)
Filename for Schedule Updates	Yes	Enter the directory/ filename for the schedule updates file. The default filename is sortdp.dat.	
Filename for Not Scheduled	Yes	Enter the directory/ filename for the not scheduled courses file. The default filename is losers.dat.	
Filename for	Yes	Enter the directory/	

Parameter Name	Required?	Description	Values
Schedule Errors		filename for the schedule errors file. The default filename is <code>notposs.dat</code> .	
Audit or Update	Yes	Enter <code>A</code> to run the report in Audit mode or <code>U</code> to update the database. The default value is <code>A</code> .	A - Audit mode U - Update mode
Print Detail	Yes	Enter <code>Y</code> to print report detail or <code>N</code> to not print report detail. The default value is <code>N</code> .	Y - Print detail N - Do not print detail

Update Building/Room Process (SSRSCMT)

Updated: August 27, 2020

This process reads the Scheduler Work Table (SSTSCHW) entries (viewable on SSASCHW) and updates the SSRMEET table with the room assignments generated in Schedule25.

Only those records with an Update Indicator of `Y` will be applied. The Work Table Update Indicator value will be changed to a `U` as a result of the upload process of the scheduled sections to indicate that the upload was successful for that record.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code(s) for the room assignments.	Term Code Validation Form (STVTERM)
Audit/Update Mode	Yes	Enter <code>A</code> to run the process in Audit mode or <code>U</code> to update the database. The	A - Audit mode U - Update mode

Parameter Name	Required?	Description	Values
		default is A.	

Scheduler Work Table Purge Process (SSRSCPR)

Updated: August 27, 2020

This process is used to delete Scheduler Work Table (SSTSCHW) data based on the term or campus specified in the parameters or both.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code for the data to be deleted.	Term Code Validation Form (STVTERM)
Campus Code	No	Enter the campus code for the data to be deleted.	Campus Code Validation Form (STVCAMP)
Update (U), Audit (A), Mode	Yes	Enter A to run the process in Audit mode or U to update the database. The default is U.	A - Audit mode U - Update mode

Section Fee Population Process (SSPMFEE)

Updated: August 27, 2020

This process examines the course/section characteristics defined in SSADFEE, determines the applicable sections based on those characteristics, and inserts the appropriate records in the SSRFEES table.

It is important to note that record insertions will only occur if no section level fees have already been defined. In the case where fee entries already exist in the SSRFEES table, no insertion of new or update of existing records will be made.

The report output displays the CRNs that were updated, the section characteristics from

the fee used to create the SSRFEES records, and the total number of records inserted into the SSRFEES table. The section characteristics include department, college, campus schedule type, and instructional method. The fee information includes level, detail code, amount, and fee type. When the appropriate section is determined, the fee definition contained in SSADFEE is used to create a new fee record in the SSRFEES table. The report control information shows the term and run mode, in addition to the count of sections that were updated.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term for which the section records are to be checked for incomplete registrations.	Term Code Validation Form (STVTERM)
Run Mode	Yes	Enter A for an audit report or U to update the database. The default is A.	A - Audit mode U - Update mode

Schedule Open Learning Rule Default Process (SSPRDEF)

Updated: June 17, 2021

This process defaults open learning rules for sections, as defined on SOAORUL, for CRNs that have been created before the rules have been established or have been deleted.

Only those open learning sections where no corresponding rules have been defaulted to or entered in SSARULE (the SSRRSTS, SSRRFND, or SSREXTN tables or all of them) are updated by this process. This batch job uses the same rule defaulting criteria as the processing that occurs when a new section is created.

The report output displays the CRNs that were updated, the section characteristics from the rule used to create the SSARULE records, and the total number of records inserted into the SSRRSTS, SSRRFND, and SSREXTN tables. The report control information shows the term and run mode, in addition to the count of sections that were updated.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term for which the section records are to be checked for missing open learning section level rules.	Term Code Validation Form (STVTERM)
Run Mode	Yes	Enter A for an audit report or U to update the database. The default is A.	A - Audit mode U - Update mode

Available Seats to Zero Process (SSRASTZ)

Updated: August 27, 2020

This process is used to modify the available seats for a CRN by setting the number of available seats to zero. This process can be run in Audit or Update Mode for a term or part-of-term and can specify CRNs by campus, subject, and course number.

The process will change the maximum enrollment for a section (SSBSECT) to the same value as the number of students that are registered in the section. If reserved seats exist (SSRRESV), that capacity is also reduced for each rule.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term for the CRNs for which available seats are to be set to zero.	Term Code Validation Form (STVTERM)
Part of Term	No	Enter the part of term for which specific CRNs are to be processed, or enter % for all parts of term.	Part of Term Code Validation Form (STVPTRM)
Campus	No	Enter the campus for which CRNs are to	Campus Code Validation Form

Parameter Name	Required?	Description	Values
		be processed, or enter % for all campuses.	(STVCAMP)
CRN	No	Enter one or more CRNs to be processed, or enter % for all CRNs.	
Subject	No	Enter the subject for which CRNs are to be processed, or enter % for all subjects.	Subject Code Validation Form (STVSUBJ)
Course	No	Enter the course number for which CRNs are to be processed. If a value has been entered in the Subject parameter, the Course parameter is required.	
Run Mode	Yes	Enter A to produce an audit report or U to update the database. The default is A.	A - Audit mode U - Update mode

General Person

Updated: August 27, 2020

Person Directory Report (SPRPDIR)

Updated: August 27, 2020

This report is used to produce a list of persons, addresses, and primary phone numbers in the system by type of person.

You can run this report for recruits, applicants, students, or faculty members or all of them. If you choose faculty members you can specify instructors, advisors, both, or all faculty members. You can also create a population selection.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term code representing the term for which the list is to be printed.	Term Code Validation Form (STVTERM)
Person Type List	Yes	Enter R to run the list of recruits, A to run the list of applicants, S to run the list of students, and enter F to run the list of faculty members. Multiple values are permitted.	R - Recruits A - Applicants S - Students F - Faculty
Confidential Person Print Ind	Yes	Enter N to restrict printing of confidential persons; enter Y to print confidential person's information.	Y - Print confidential information N - Do not print confidential information
Address Selection	No	Which address,	

Parameter Name	Required?	Description	Values
Date		effective on this date, do you want to print on the report. Leave blank for today; enter in date format DD-MON-YYYY.	
Address Type	Yes	<p>Enter the address type to be printed on the report; multiple requests are permitted and must be entered in priority sequence.</p> <p>For example, 1MA 2PR will first print the mailing address, and if none is found, will print the permanent address.</p> <p>Enter each parameter then hit return for the next prompt. Returning with a null value will move you on to the next parameter.</p>	Address Type Code Validation Form (STVATYP)
Print ID	No	Enter Y to print the IDs for the persons on the list. Enter N if you don't want the IDs printed.	Y - Print IDs N - Do not print IDs
Faculty Type	No	Enter A to print the faculty members who are advisors; enter I to print the	A - Faculty Advisors I - Faculty Instructors

Parameter Name	Required?	Description	Values
		faculty members who are instructors; enter B to print faculty members who are advisors and instructors; leave Null to print all faculty members regardless of type.	B - Both Null - All faculty types
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Form (GLIEXTR) may be	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		used to review the people who will be processed in the load from the selection identifier and application code entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	

Support Services Load Process (SERLOAD)

Updated: August 27, 2020

This process is used to automatically create needs, goals, and services for a group of people based on a user-defined service group.

This process accepts an input file from the Population Selection process to create the support services information. See the *Banner General Use* content on the Ellucian Documentation site to review the method used to create a population selection.

Parameter Name	Required?	Description	Values
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
Report Term	Yes	Enter the code	Term Code

Parameter Name	Required?	Description	Values
		representing the term for which the report is to be run.	Validation Form (STVTERM)
Effective Term	Yes	Enter the term code representing the effective term for which the support service detail is to be loaded. This term will also control which service group rules are to be used when creating the goals, needs, and services detail.	Term Code Validation Form (STVTERM)
Service Group Code	Yes	Enter the service group for which the population is being loaded. All persons in the file will be loaded with this service group code. Multiple service group codes may be entered.	Service Group Validation Form (STVSSGP)

Faculty Load

Updated: August 27, 2020

Instructor Schedule Report (SIRASGQ)

Updated: August 27, 2020

This report is used to print an instructor's schedule, with detailed information including session dates and times, course names and CRNs, rooms where the classes are being held, and enrollments, etc. Faculty salary information may be printed on faculty schedules, but only if the Banner Human Resources System is installed.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term for which you want the instructor's schedule to be printed.	Term Code Validation Form (STVTERM)
ID Number	No	Enter the ID number for the instructor for which you want the schedule run (multiple requests permitted). Entering % will select all instructors.	
Part of Term (% for all)	No	Enter the part of term code for which the instructor's schedule is to be printed. Multiple parts of term can be entered, or a % can be used to indicate that all parts of term within the selected term are to be	Part of Term Code Validation Form (STVPTRM)

Parameter Name	Required?	Description	Values
		printed.	
Print Salary	No	Enter Y to print the faculty member's salary on their schedule. Enter N when you do not want to print the faculty member's salary on their schedule. The Banner Human Resources System must be installed to use this parameter.	Y - Print salary N - Do not print salary
Salary Effective Date	No	Enter the effective date in DD-MON-YYYY format. This parameter is required if the Print Salary parameter is set to Y.	

Faculty Load Contract Analysis Report (SIRCTAL)

Updated: August 27, 2020

This report is used to calculate and print the Faculty Load contract analysis.

Name	Required?	Description	Values
Schedule Term	Yes	Enter the term for which you want the contract analysis to be printed.	Term Code Validation Form (STVTERM)
ID Number	No	Enter the ID number for the instructor for	

Name	Required?	Description	Values
		which you want the contract analysis run (multiple requests permitted). Entering a <code>Null</code> value will select all instructors.	
Contract Type	No	Enter the faculty contract type for which the instructor's contract analysis is to be printed. Multiple contract types can be entered, or enter a <code>Null</code> value to indicate that all contract types are to be printed.	Faculty Contract Type Code Validation Form (STVFCNT)
Category Code	No	Enter the faculty category code for which you want the contract analysis to be run. Multiple category codes can be entered, or a <code>Null</code> value will select all category codes.	Faculty Category Code Validation Form (STVFCTG)
Staff Type	No	Enter the faculty staff type for which you want the contract analysis to be created. Multiple staff types can be entered, or enter a <code>Null</code> value for all faculty staff types.	Faculty Staff Type Code Validation Form (STVFSTP)
Instructor/	Yes	Enter <code>I</code> to select	I - Instructor college

Name	Required?	Description	Values
Assignment Indicator		college and department for the instructor(s); enter A to select only instructors with assignments.	and department A - Instructor assignments
College Code	No	Enter the college code for which you want the contract analysis to be run (or Null for all college codes). Multiple college codes can be selected.	College Code Validation Form (STVCOLL)
Department Code	No	Enter the department code for which you want the analysis to be run. Multiple department codes may be entered, or enter a Null value to select all department codes.	Department Code Validation Form (STVDEPT)
Sort Field	No	Enter a Null value to sort by contract and name; enter 1 to sort by college, department, and contract; enter 2 to sort by college, department, contract and name; or enter 3 to sort by college, department, contract and ID number.	1 - College, Department, Contract order 2 - College, Department, Contract, Name order 3 - College, Department, Contract, ID number order

Name	Required?	Description	Values
			Null - Contract, Name
Perform Analysis Indicator	No	Either Y or a Null value will run the analysis, or enter N if you don't want the contract analysis performed.	Y - Run analysis (also Null) N - Do not run analysis
Satisfied/Unsatisfied Indicator	No	Enter Y to list contracts which have been satisfied, enter N to list contracts which have not been satisfied, or enter a Null value to list all contracts, whether satisfied or not.	Y - List satisfied contracts N - List unsatisfied contracts Null - List all contracts
Page Break	No	Enter Y to page break on each faculty member, or N or Null for normal break.	Y - Page break on faculty N - Normal break (also Null)
Home Indicator	No	Enter Y to list home college and department for each faculty member, or N or Null to list all colleges and departments.	Y - List home college and department N - List all colleges and departments (also Null)

Faculty Load Term Analysis Report (SIRTRAL)

Updated: August 27, 2020

This report is used to calculate and print the Faculty Load term analysis.

Parameter Name	Required?	Description	Values
Schedule Term	Yes	Enter the term for which you want the term analysis to be printed.	Term Code Validation Form (STVTERM)
ID Number	No	Enter the ID number for the instructor for which you want the term analysis run (multiple requests permitted). Entering a <code>Null</code> value will select all instructors.	
Contract Type	No	Enter the faculty contract type for which the instructor's term analysis is to be printed. Multiple contract types can be entered, or enter a <code>Null</code> value to indicate that all contract types are to be printed.	Faculty Contract Type Code Validation Form (STVFCNT)
Category Code	No	Enter the faculty category code for which you want the term analysis to be run. Multiple category codes can be entered, or a <code>Null</code> value will	Faculty Category Code Validation Form (STVFCTG)

Parameter Name	Required?	Description	Values
		select all category codes.	
Staff Type	No	Enter the faculty staff type for which you want the term analysis to be created. Multiple staff types can be entered, or enter a Null value for all faculty staff types.	Faculty Staff Type Code Validation Form (STVFSTP)
Instructor/ Assignment Indicator	Yes	Enter I to select college and department for the instructor(s); enter A to select only instructors with assignments.	I - Instructor college and department A - Instructor assignments
College Code	No	Enter the college code for which you want the term analysis to be run (or Null for all college codes). Multiple college codes can be selected.	College Code Validation Form (STVCOLL)
Department Code	No	Enter the department code for which you want the analysis to be run. Multiple department codes may be entered, or enter a Null value to select all department codes.	Department Code Validation Form (STVDEPT)
Sort Field	No	Enter a Null value to sort by college	1 - College, Department,

Parameter Name	Required?	Description	Values
		and department; enter 1 to sort by college, department, category, and staff type; enter 2 to sort by college, department, and name; or enter 3 to sort by ID number.	Category, Staff type, Contract order 2 - College, Department, Name order 3 - ID number order Null - College, Department
Perform Analysis Indicator	No	Enter Y or Null to run the analysis, or enter N if you don't want the term analysis performed.	Y - Run analysis (also Null) N - Do not run analysis
Satisfied/Unsatisfied Indicator	No	Enter Y to list workload term rules which have been satisfied, enter N to list workload term rules which have not been satisfied, or enter a Null value to list all workload term rules, whether satisfied or not.	Y - List satisfied workload rules N - List unsatisfied workload rules Null - List workload rules
Page Break	No	Enter Y to create a page break on each faculty member, or enter N or Null for a normal page break.	Y - Page break on faculty N - Normal break (also Null)
Home Indicator	No	Enter Y to list home college and department for each	Y - List home college and department

Parameter Name	Required?	Description	Values
		faculty member, or enter N or Null to list all colleges and departments.	N - List all colleges and departments (also Null)

Instructional Assignment Purge Process (SIPASGN)

Updated: August 27, 2020

This process is used to purge the instructional assignments, the non-instructional assignments, and the rules associated with the term being processed.

Parameter Name	Required?	Description	Values
Report Term	Yes	Enter the term to be printed in the report heading.	Term Code Validation Form (STVTERM)
Purge Term	Yes	Enter the term for which the purge process is to be performed.	Term Code Validation Form (STVTERM)
Purge Instructional Assignments	No	Enter a Y to purge all instructional assignments for the term being processed.	Y - Purge instructional assignments Null - Do not purge assignments
Purge Non-Instructional Assignments	No	Enter a Y to purge all non-instructional assignments for the term being processed.	Y - Purge non-instructional assignments Null - Do not purge assignments
Purge Workload Rules	No	Enter a Y to purge all workload rules for	Y - Purge workload rules

Parameter Name	Required?	Description	Values
		the term being processed.	Null - Do not purge assignments
Run Mode	Yes	Enter A for running the process in Audit mode. Enter a U to run the process in Update mode.	A - Audit mode U - Update mode

The information is stored in the following tables when the process is run.

Title	Table Name
Instructional Assignment Purge	<ul style="list-style-type: none"> • saturn.spriden • saturn.sirasgn
Non-Instructional Assignments	<ul style="list-style-type: none"> • saturn.spriden • saturn.sirnist
Workload Rules Purge (FLRT)	saturn.sirflrt
Workload Rules Purge (FLCT)	saturn.sirflct

Location Management

Updated: August 27, 2020

Dormitory Address Creation Report (SLRDADD)

Updated: August 27, 2020

This report is used to create dormitory address information from the housing assignments. The address associated with the dormitory assignment is maintained in the Building Definition Form (SLABLDG). This job will create a dormitory address for each active room assignment that falls within the requested room assignment date.

A check prevents a new dormitory address from being created if a record of the type selected in the parameters exists with no effective dates. For example, if a Dormitory Address (DO) exists with no effective dates and the Dormitory Address Creation Report is run for the term 199301, and a new DO address is to be created based on the person's assignments, an error message is generated, and no update will occur.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term code representing the term for which the assignments are to be created.	Term Code Validation Form (STVTERM)
Room Assignment Date	Yes	Enter the date on which the assignments take effect. This parameter is used to specify that only those room assignments which are active on the date selected are used to create address records.	

Parameter Name	Required?	Description	Values
		For example, if an assignment runs from 9/1 through 9/15, and the user enters 9/16 in this parameter, then the assignments will not be selected.	
Address Type	Yes	Enter the address type by which the created address should be referenced.	Address Type Code Validation Form (STVATYP)
Address Source	No	Enter the address source by which the created address should be referenced.	Address Source Validation Form (STVASRC)

Active Housing Assignments Report (SLRHLST)

Updated: August 27, 2020

This report is used to list all of the active housing assignments.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term code representing the term for which the assignments are to be repeated.	Term Code Validation Form (STVTERM)
Room Assignment Date	No	Enter the date for which the room assignment should	

Parameter Name	Required?	Description	Values
		be selected. Leave blank for today's date, or enter the date selected in date format DD-MON-YYYY.	
Report Sequence	Yes	Enter 1 to print the report in name order, enter 2 to print in ID number order, or enter 3 to print in building/room order.	1 - Name order 2 - ID number order 3 - Building/room order
Address Selection Date	No	Enter the effective date for the address you want to have printed on the report. Leave blank for today, or enter in date format DD-MON-YYYY.	
Address Hierarchy	Yes	Enter the address type to be printed on the report; multiple requests are permitted and must be entered in priority sequence. For example, 1MA 2PR will first print the mailing address, and if none is found, will print the permanent address. Enter each	Address Type Code Validation Form (STVATYP)

Parameter Name	Required?	Description	Values
		parameter then hit return for the next prompt. Returning with a null value will move you on to the next parameter.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		people who will be processed in the load from the selection identifier and application code entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	

Batch Room/Meal/Phone Assess Report (SLRFASM)

Updated: August 27, 2020

This report is used to provide batch assessment for room, meal, and phone charges.

The process automatically populates the Original Indicator to Y, for the first time assessment occurs, for a specific detail code, for the student, for the term, and for all assessments before the cutoff dates established on SLATERM.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term code representing the term for which the assessments are to be calculated.	Term Code Validation Form (STVTERM)
Process Indicator	Yes	Enter 0 to batch assess all outstanding room, meal, and phone	0 - Assess room, meal, phone

Parameter Name	Required?	Description	Values
		charges; enter % to assess everyone.	% - Assess everyone
Update Bills	Yes	Enter N if you do not want to update the student's bills, or Y to update the bills.	Y - Update bills N - Do not update bills
Sort Sequence	Yes	Enter I to sort by ID number, or N to sort by name.	I - ID number order N - Name order

Assignment Roll Process (SLRROLL)

Updated: August 27, 2020

This process is used to roll one term's housing, meal, and phone assignments forward to another term.

Parameter Name	Required?	Description	Values
From Term	Yes	Enter the term code representing the term from which the housing, meal, and phone assignments are to be rolled.	Term Code Validation Form (STVTERM)
To Term	Yes	Enter the term code representing the term to which the housing, meal, and phone assignments are to be rolled.	Term Code Validation Form (STVTERM)
Report Mode	Yes	Enter A for Audit mode or U for Update mode. Audit mode does not	A - Audit mode U - Update mode

Parameter Name	Required?	Description	Values
		update the database and is useful for identifying errors which can then be corrected for a roll in Update mode.	
Roll Room Assignments	Yes	Enter Y to roll room assignments, N to not roll room assignments.	Y - Roll assignments N - Do not roll assignments
Room Assignment Status Code	No	Enter the status code for the room assignment. This code will be the status assigned to the rolled room assignments. Only one active room assignment is rolled at a time.	Room Assignment Status Code Validation Form (STVASCD)
Room Assignment Status Date	No	Enter the date on which the room assignment becomes effective. When a status code is entered in the Room Assignment Status Code parameter, you must enter an associated status date in this parameter.	
Roll Meal Assignments	Yes	Enter Y to roll meal assignments, N to not roll meal	Y - Roll assignments

Parameter Name	Required?	Description	Values
		assignments.	N - Do not roll assignments
Meal Assignment Status Code	No	Enter the status code for the meal assignment. Only one active meal assignment is rolled at a time.	Meal Assignment Status Code Validation Form (STVMSCD)
Meal Assignment Status Date	No	Enter the date on which the meal assignment becomes effective. When a status code is entered in the Meal Assignment Status Code parameter, you must enter an associated status date in this parameter.	
Roll Phone Assignments	Yes	Enter Y to roll phone assignments, N to not roll phone assignments.	Y - Roll assignments N - Do not roll assignments
Phone Assignment Status Code	No	Enter the status code for the phone assignment. Only one active phone assignment is rolled at a time.	Phone Assignment Status Code Validation Form (STVPSCD)
Phone Assignment Status Date	No	Enter the date on which the phone assignment	

Parameter Name	Required?	Description	Values
		<p>becomes effective.</p> <p>When a status code is entered in the Phone Assignment Status Code parameter, you must enter an associated status date in this parameter.</p>	

Batch Housing Schedules Report (SLRSCHE)

Updated: August 27, 2020

This report is used to extract the building, room, and application data from the database, and create a temporary assignment file for a processing term, based on the applicant's preferences, priorities, and attributes.

Note: You must run SLRSCHE before running SLRSCHD, to create the temporary assignment file of data to be used when SLRSCHD is run.

Parameter Name	Required?	Description	Values
Term	Yes	<p>Enter the term code for the term to be used when creating the temporary assignment data. The data is then used when SLRSCHD is run.</p>	Term Code Validation Form (STVTERM)

There is no hardcopy output associated with this report.

Batch Scheduler Report (SLRSCHD)

Updated: August 27, 2020

This report is used to create dormitory housing assignments in batch mode, based on the applicant's preferences.

Note: You must run the COBOL program `slrsche.pco` first, to create a temporary assignment file of data to be used in running SLRSCHD.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term code representing the term for which the assignments are to be created.	Term Code Validation Form (STVTERM)
Report Order	Yes	Enter <code>I</code> to run the report in ID number order, <code>N</code> to run in name order, or <code>P</code> to run in application priority order.	I - ID number order N - Name order P - Application priority order
Report Mode	Yes	Enter <code>A</code> to run in Audit mode or <code>U</code> to run in Update mode. Audit mode does not update the database and is useful for identifying errors which can then be corrected before Update mode.	A - Audit mode U - Update mode
Room Rate Code	Yes	Enter the desired rate code for the rooms to be scheduled. This parameter is required whether the report is run in Audit mode or	Room Rate Code Validation Form (STVRRCD)

Parameter Name	Required?	Description	Values
		Update mode.	
Room Assignment Status Code	Yes	Enter the status code for the room assignment. This parameter is required whether the report is run in Audit mode or Update mode.	Room Assignment Status Code Validation Form (STVASCD)
Room Assignment Status Date	Yes	Enter the date on which the room assignment becomes effective. This parameter is required whether the report are run in Audit mode or Update mode.	

Housing Purge Process (SLPHOUS)

Updated: August 27, 2020

This process will purge the housing applications, housing, meal plan, and phone assignments for the user specified terms and activity dates.

These assignment assessments must have been processed and accepted in the Accounts Receivable module. The user may choose either of two options: option 1 is purge by term, and option 2 is purge by term and activity date.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term code representing the term for which the housing information is to be purged.	Term Code Validation Form (STVTERM)
Purge Option	Yes	Enter 1 to purge	1 - Purge by term

Parameter Name	Required?	Description	Values
		records by term or 2 to purge records by term and activity date.	2 - Purge by term and activity date
Activity Date	No	Housing assignments with activity dates that match the date entered will be purged. Enter in date format DD-MON-YYYY.	
Run Mode	Yes	Enter A to produce a listing of all selected purge data without affecting the database. Enter U to update the database after purging the selected data.	A - Audit mode U - Update mode

ACS Housing Interface Report (SLRBACS)

Updated: August 27, 2020

This report reads Banner files and extracts the specified data into a file for use by the Applied College Systems (ACS) Housing Information System (HIS).

The printed output is shown in a control report with totals of the records sent. A transaction file is also produced, which is formatted and ready to be run through the ACS HIS. This reduces the amount of data entry required in the Housing Information System.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code to be used to select housing application	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		records for the ACS HIS file.	
Address Selection Date	No	Enter the date in DD-MON-YYYY format for the address(es), effective on this date, to be extracted for the ACS HIS file. The system date is the default if this parameter is left blank.	
Address Type	Yes	Enter the address type to be used in the selection of the addresses. Up to two address types may be requested.	

Recruiting

Updated: August 27, 2020

Rec/Enroll Analysis - How Learned Report (SRRENHR)

Updated: August 27, 2020

This report is used to produce a statistical report of recruits, applicants, and enrollees by a How I Learned code for a term range.

The data collected are based first on the prospect How I Learned About code and then on term. An optional section may be printed for How I Learned About codes which have no corresponding recruiting data associated with them.

Note: The App (Applied) column displays a count of those recruits that *exactly* match an applicant (SARADAP) for: PIDM, term, level, degree, and major.

Parameter Name	Required?	Description	Values
From Term	Yes	Enter the term code representing the term from which the recruiting enrollment analysis is to be run.	Term Code Validation Form (STVTERM)
To Term	Yes	Enter the term code representing the term to which the recruiting enrollment analysis is to be run.	Term Code Validation Form (STVTERM)
How I Learned About	No	Enter the code(s) for the source of the prospect contact, or enter % for all.	Web Prospect How I Learned About Validation Form (STVLEND)
Recruiter Codes (Default = All)	No	Enter the code(s) for the recruiter(s) to be reported, or enter % for all.	Recruiter Code Validation Form (STVRECR)

Parameter Name	Required?	Description	Values
Print All How I Learned Codes	No	Enter Y to print the How I Learned About codes which have no associated recruiting records. Enter N to not print this section of the report.	Y - Print codes N - Do not print codes

Recr/ Enrl Analysis - Source/Recr Report (SRRENRL)

Updated: August 27, 2020

This report is used to produce a statistical report of recruits, applicants, and enrollees by source and recruiter for a term range. You may print an optional section for source codes which have no corresponding recruiting data associated with them.

Parameter Name	Required?	Description	Values
From Term	Yes	Enter the term code representing the term from which the recruiting enrollment analysis is to be run.	Term Code Validation Form (STVTERM)
To Term	Yes	Enter the term code representing the term to which the recruiting enrollment analysis is to be run.	Term Code Validation Form (STVTERM)
Source Codes (Default = All)	No	Enter the code(s) for the enrollment source(s) to be reported or leave blank for all sources to be included in the analysis.	Source/Background Institution Code Validation Form (STVSBGI)
Recruiter Codes (Default = All)	No	Enter the code(s) for the specific recruiter	Recruiter Code Validation Form

Parameter Name	Required?	Description	Values
		information to be included or leave blank to include all recruiter information.	(STVRECR)
Print All Source Codes (Y/N)	No	Enter <i>y</i> to print the source codes which have no associated recruiting records. Enter <i>n</i> to not print this section of the report.	Y - Print codes N - Do not print codes

Recruits Never Applied to Inst. Report (SRRINQR)

Updated: August 27, 2020

This report produces a list of recruits who have no admission records with a term that is greater than or equal to the recruit term specified in the Term parameter for the following conditions.

- the level of the admissions application is the same as the level of the recruiting record, the primary curriculum degree, and major of the application, or
- the secondary curriculum degree and the major of the application are the same as the degree and the major of the recruiting term.

If multiple recruiting records exist for a person within the same term, each recruiting record is individually compared to each admissions application that may exist for terms greater than or equal to the recruiting term. If any match is found based on the criteria described, the recruit will be selected.

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

If the Print Indicator parameter is selected, the report output will include a listing of the

recruits selected. If the Delete Indicator parameter is selected, the report output will contain only the report control information indicating the total number of recruiting records deleted.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code representing the recruiting term for which you want to run the report.	Term Code Validation Form (STVTERM)
Delete High School Info (Y/N)	Yes	Enter Y to delete high school information; enter N to save high school information.	Y - Delete high school information N - Save high school information
Delete Prior College Info (Y/N)	Yes	Enter Y to delete prior college information; enter N to save prior college information.	Y - Delete prior college information N - Save prior college information
Delete Prior Test Info (Y/N)	Yes	Enter Y to delete prior test information; enter N to save prior test information.	Y - Delete prior test information N - Save prior test information
(P)rint/(D)elele Indicator	Yes	Enter P to print the list of recruits without admission records. Enter D to delete the existing records.	P - Print recruits without admission records D - Delete existing records
Contact Code	No	Enter the contact code(s) to be processed.	Contact Type Code Validation Form (STVCTYP)
Source Code	No	Enter the source/	Source/Background

Parameter Name	Required?	Description	Values
		background institution code(s) to be processed.	Institution Code Validation Form (STVSBGI)
Level Code	No	Enter the level code to be processed.	Level Code Validation Form (STVLEVL)
Campus Code	No	Enter the campus code to be processed.	Campus Code Validation Form (STVCAMP)
College Code	No	Enter the college code to be processed.	College Code Validation Form (STVCOLL)
Degree Code	No	Enter the degree code to be processed.	Degree Code Validation Form (STVDEGC)
Program Code	No	Enter the program code to be processed.	Program Definition Rules Form (SMAPRLE)
Major Code	No	Enter the major code to be processed.	Major, Minor, Concentration Code Validation Form (STVMAJR)

Communication Plan Processing Report (SORCPLN)

Updated: August 27, 2020

This report is used to show a person's movement from an old communication plan to a new communication plan. Old plans may be inactivated or deleted, and old materials associated with plans may be deleted or saved.

Note: See the *Communication Plan Processing* information in the *Recruiting* section of the *Banner Student Use* content for further detail on the use of this process.

Parameter Name	Required?	Description	Values
Sort Option	Yes	Enter N to sort on name or I to sort on ID.	N - Name I - ID
Inactivate Old Communication Plans	Yes	Enter I to inactivate any old communication plans or D to delete old communication plans.	I - Inactivate D - Delete
Delete Materials	Yes	Enter Y to delete materials associated with old communication plans. Enter N to save materials associated with old communication plans.	Y - Delete old materials N - Save old materials

Electronic Prospect Load Process (SRTLLOAD)

Updated: August 27, 2020

This process loads data from a search input file (for example, College Guide/SSS, PCU, or Peterson) or a test score report file (for example, SAT, ACT, GRE, or AMCAS), to the following temporary tables.

- SRTIDEN
- S RTPERS
- SRTTELE
- SRTADDR
- SRTTEST
- S RTPREL

- SRTHSCH
- SRTPCOL
- SRTEMAL
- SRTGPAT
- SRTCRSS
- SRTSUPL
- SRTDEGR
- SRTMAJR
- SRTTSPC

The data in these tables is available using the Search Tape View (SRVPREL) or SRAPREL. Detail is also available when accessing these loaded records on SRIPREL using the Detail [SRAPREL] item in the Options Menu. The SRTLOAD process also creates an audit report detailing the status of each record on the input file.

This process can be used to load positional files (SAT, GRE, etc.) and delimited files (AMCAS). It reads delimited input files based on whether rules for file delimiters or delimiters and markers exist in the SORDLIM table for a given tape code. The process will either look for the fields by position or by sequence number as defined on SRATPFD in the SRRTPFD_START_POS field. The process refers to the STVTESC_TESC_CODE_DATE_ORIGIN field for test codes.

Report Setup and SOTCNVT Rules

Updated: August 27, 2020

You should do the following in preparation for running SRTLOAD.

- If the input file is delimited, set up the delimiter (and optionally the marker) on SORDLIM for the tape code being used.
- Set up the corresponding interface (INFC) code and tape code values on STVPREL.
- Assign the appropriate matching source code to the interface code on STVINFC.
- Set up rules on SOTCNVT for the conversion of the file values to the Banner

validation table values.

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

If the code on the file is blank, an asterisk (*) value is matched against SOTCNVT. If the file value is not blank, the incoming value is matched against SOTCNVT. If there is no available conversion for the file value or the file value is not valid on the Banner validation table, the literal `DEFAULT` is matched against SOTCNVT. If the literal `DEFAULT` is not available, then an error message is printed on the report.

On SOTCNVT, the following tables are validated:

- NATN
- CITZ
- STAT
- INTS
- INTP (PSAT only)
- ETHN
- ETHR (AMCAS only)
- DEGC
- DEGA (AMCAS only)
- MAJR
- MAJP (PSAT only)
- RELG
- CNTY
- TADM
- TERM
- DEPT
- VTYP

- EDLV
- EGOL
- ADMT (AMCAS only)
- TEAC (AMCAS only)
- TEFR (AMCAS only)
- SBGI (college code conversions)
- SBGH (high school code conversions)
- HGPA (SAT only)
- CAMP
- ESEL
- GNDR
- TESC
- TSPT

The exceptions for determining conversions and default values are for the major code, interest code, term code, level code, campus code, contact type code, source code, address type code, email type code, and telephone code. SRTLOAD will appropriately analyze the high school or prior college graduation date on the incoming file against rules on SOTCNVT to determine the term code, or it will use the term code entered in the SRTLOAD Term Code parameter.

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 that is 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 data loads. The asterisk (*) 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 values, the output report will display an error indicating the field and the error. INTS will not use the asterisk (*) or the

DEFAULT functionality due to the possibility of many records existing on the incoming data file.

High school codes can be converted using the SBGH validation on SOTCNVT. If there is no high school conversion on SOTCNVT, the STVSBGI code will be used if there is a match. Non-high school codes cannot be entered using the SBGH validation on SOTCNVT. Colleges codes can be converted on SOTCNVT with SBGI validation, and if a code exists in STVSBGI, that code will be loaded.

The default values on SRAPRED are used when there are no SOTCNVT values *and* if the corresponding parameter on SRTLOAD is blank. When there are no SOTCNVT values and if the corresponding parameter on SRTLOAD is blank, SRTLOAD will first use the data that exists on the incoming file for such fields as Term, Major, etc. If no value exists on the file, and the value does not convert on SOTCNVT, then SRTLOAD will use the data in the parameter. If no value exists in the parameter, SRTLOAD will use the value on SRAPRED. The Test Source will default in from STVINFC. The Tape Source and Contact Type fields will be populated from STVINFC, if there are no corresponding SRTLOAD parameter values. If no values exist on STVINFC, the values will default from SRAPRED where appropriate.

Loading Data to Banner

Updated: August 27, 2020

When data is loaded to Banner, the load hierarchy is as follows.

1. Values from SOTCNVT, if they exist.
2. Values from the SRTLOAD parameters, if they have been entered.
3. Values from STVINFC (contact type or source code or both), if they exist, and if valid parameter values do not exist on SRTLOAD.
4. Values from SRAPRED, if they exist.

Note: For AMCAS, the student type will always need to be updated on SRAPRED for the level for which you are running SRTLOAD, so the required Student Type value is loaded for the applicant.

When matching nation codes, if no code exists on the file and a nation description is provided, the nation description will be compared against the nation description in STVNATN. If there is an exact match, the nation code will be updated in the SRTNATN

temporary table and can be loaded to Banner.

For example, when no SOTCNVT rules exist for STVNATN and the nation description is provided on the file:

- Nation `Singapore` will be translated and update `SRTADDR_NATN_CODE = 133` when `STVNATN` code `133 = Singapore`.
- Nation `Mexico` will be translated and update `SRTADDR_NATN_CODE = 99` when `STVNATN` code `99 = Mexico`.
- Nation `Albania` will be translated and update `SRTADDR_NATN_CODE = 2` when `STVNATN` code `2 = Albania`.
- However, `Bahamas` would not be translated, as `STVNATN` code `10 = The Bahamas`.

Note: The nation code will be loaded to Street Line 3, and there will be associated API errors because of the nation and the state. The record would need to be resolved manually on GOAMTCH before loading.

SRTLLOAD will provide the following messaging based on the above examples:

Data Item	Nation Code	Message
NATN	99	Nation found from description
NATN	2	Nation found from description
NATN	133	Nation found from description
NATN	BAHAMAS	Not In SOTCNVT, STVNATN

PCU Prior College Degree Tracking

Updated: August 27, 2020

SRTLLOAD will update the prior college for the UNKNOWNPCOL rule on SAAERUL, when a current college name exists on the incoming file.

If the UNKNOWNPCOL rule does not exist, no prior college will be loaded to the temporary table. No attempt will be made to convert the incoming PCU Current College

Name field. (This field is a free format field from the PCU.) The field value may be selected from a pick list provided by the PCU or may be manually entered by the recruit or prospect.

Due to the variety of data entry options (selecting a college name or manually entering the data), no attempt will be made to compare the incoming PCU Current College Name value against the description in STVSGBI to avoid corrupt, incorrect, or incomplete data. Data can be corrupt, incorrect, or incomplete due to the following reasons:

- the absence of an incoming college code to be used for conversion to Banner
- the PCU value length of 100 characters (in contrast to the 30 character description length on STVSGBI)
- potential misspellings, abbreviations, and formatting and data inconsistencies related to manual entry

Use the PCU Prior College Degree Code parameter for prior college degree tracking. You can enter the degree code that will be applied to the prior college record for PCU processing. The parameter is validated against the Degree Code Validation Form (STVDEGC).

The PCU file provides a prior college GPA, but it does not provide a degree code. If the prior college GPA exists, it cannot be loaded without an associated degree or degree sequence number or both. The degree GPA also requires the existence of the UNKNOWNPCOL rule on SAAERUL.

The PCU Prior College Degree Code parameter will provide a degree code that is loaded to the SRTDEGR/SORDEGR tables when a prior college GPA and an incoming current college name exist. When the degree from the parameter and the GPA are loaded, the degree will not be flagged as primary, because the PCU does not provide that information in the file. The degree will not be loaded without an existing GPA.

Note: No college or degree information will be loaded without an UNKNOWNPCOL rule in SAAERUL. If it is preferred no PCU college, degree, or GPA data be loaded to Banner, this rule may be removed from SAAERUL.

PCU Processing and Output

Updated: August 27, 2020

SRTLOAD will perform the following during PCU processing.

- Load the student type value to the `SRTPREL_STYP` field in Banner.
- Load the incoming high school GPA to the `SRTHSCH_GPA` field in Banner. A high school code must exist for conversion or default, or the incoming high school GPA will not be loaded.
- Load the incoming prior college GPA to the `SRTPCOL_GPA_TRANSFERRED` field in Banner. The prior college GPA will not be loaded unless the `UNKNOWNPCOL` rule has been set up on `SAAERUL`, and the PCU degree has been entered in the PCU Prior College Degree Code parameter in SRTLOAD.

Before the optional Summary Report in the SRTLOAD output, a list of ID numbers is printed from the incoming PCU file for records with the student type of O. (Note that you may have chosen a different student type for these records on SOTCNVT.) This list of IDs can be used to review the records on SRIPREL. The records with a student type of O, in addition to any other records, can then be loaded manually or processed using SRRSRIN or SRRPREL or both.

Recruiter to Banner interface for SRTLOAD

Updated: August 27, 2020

This process prevents the electronic prospect load validation code that was created specifically for the Recruiter Banner integration from being used for the Electronic Prospect Code parameter value.

If your electronic prospect load code for the integration is entered in this parameter, the process will be terminated, and an error message will be produced.

Parameter Name	Required?	Description	Values
Data File Name	Yes	Enter the path and file name containing the search file records or test score	

Parameter Name	Required?	Description	Values
		records to be loaded (for example, /tmp/search.data).	
Electronic Prospect Code	Yes	Enter the electronic prospect code to be used in the load.	Electronic Prospect Validation Form (STVPREL)
Tape ID	No	Enter the additional ID of the tape, which is useful if multiple files are being loaded for the same electronic prospect code.	
AMCAS School Number	No	<p>Enter the AMCAS school code to be processed in the load.</p> <p>This parameter is optional for all incoming AMCAS files. If there are multiple school numbers on the incoming file, the parameter will sort the data by the school number entered and only process those records. If this parameter is left Null, then all records on the file will be processed.</p>	
SSN or Generated ID	Yes	Enter s to use the	S - Use SSN from

Parameter Name	Required?	Description	Values
		<p>SSN from the data file or G to always generate a new ID.</p> <p>If the ID is generated or the incoming data is all zeros (as is the case with some ACT records), the process will display GEN 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>	<p>data file</p> <p>G - Generate a new ID</p>
Term Code	No	Enter the 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, or if no term has been entered on SRAPRED.	Term Code Validation Form (STVTERM)
Level Code	Yes	Enter the level code that will go on the prospect's recruit record.	Level Code Validation Form (STVLEVL)

Parameter Name	Required?	Description	Values
Campus Code	No	Enter the campus code that will go on the prospect's recruit record.	Campus Code Validation Form (STVCAMP)
AMCAS Degree Code	No	<p>Enter the degree code for the prospect record.</p> <p>This parameter is optional for all tapes except AMCAS. AMCAS requires the degree code for the application.</p> <p>AMCAS applications will not have a degree code if: this parameter is not entered, the incoming AMCAS APPL_TYPE does not have a corresponding conversion on SOTCNVT for validation table name DEGA, or a degree has been entered for the level code on SRAPRED for which SRTLOAD is run.</p>	Degree Code Validation Form (STVDEGC)
AMCAS Major Code	No	Enter the major code for the prospect/ application record.	Major, Minor, Concentration Code Validation Form (STVMAJR)

Parameter Name	Required?	Description	Values
		<p>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 AMCS.</p> <p>If no AMCAS major code is entered for this parameter, you must have a major code listed on SRAPRED for the level code for which you are running SRTLOAD. SRTLOAD will indicate a missing major for AMCAS on the log file, and the process will terminate if no AMCAS major is found on SRTLOAD or SRAPRED.</p>	
Department Code	No	<p>Enter the department code for the prospect record.</p> <p>AMCAS files do not provide for a department code. You can establish</p>	Department Code Validation Form (STVDEPT)

Parameter Name	Required?	Description	Values
		<p>the department code for AMCAS applicants using this parameter or entering a department code value on SRAPRED for the level for which you are running SRTLOAD.</p> <p>If department code is required for curriculum processing at your institution, the department code is needed for the application to be processed correctly whether it is updated through the SRTLOAD parameter or using SRAPRED.</p>	
Contact Code	No	Enter the contact code that will go on the prospect's recruit record.	Contact Type Code Validation Form (STVCTYP)
Source Code	No	Enter the source/background institution code that will go on the prospect's recruit record.	Source/Background Institution Code Validation Form (STVSBGI)
Address Type Code	Yes	Enter the address type code for the	Address Type Code Validation Form

Parameter Name	Required?	Description	Values
		prospect's address to be used. If no value is entered, MA is the default.	(STVATYP)
Address Source Code	Yes	Enter the address source code for the prospect's recruit record.	Address Source Validation Form (STVASRC)
Telephone Type Code	No	<p>Enter the default telephone type code for the prospect's recruit record. For all data loads, this code <i>must</i> be preceded by an occurrence number.</p> <p>When the Telephone Type parameter is <code>Null</code>, the telephone type that is loaded with the telephone number should be the telephone type that is associated with the address type on STVATYP.</p> <p>When the Telephone Type parameter is <code>Null</code>, and no corresponding STVATYP value exists for the telephone type, the telephone type that is loaded should</p>	Telephone Type Validation Form (STVTELE)

Parameter Name	Required?	Description	Values
		<p>match the address type code, as long as it is also a valid STVTELE code.</p> <p>If none of the above is true, then the default telephone type is MA.</p>	
Email Type Code	No	Enter the email type code for the prospect's email.	E-mail Address Type Validation Form (GTVEMAL)
Print Test Scores	Yes	Enter Y to print test scores on the report while processing test score records or N to suppress printing test scores.	<p>Y - Print test scores</p> <p>N - Do not print test scores</p>
Default Test Month	No	Enter the default month for the test. Valid values are 01 - 12.	
Print County Code Errs (AMCAS)	Yes	<p>Enter Y to print validation errors for the county for AMCAS processing or N to not print validation errors. The default is Y.</p> <p>This option is provided, because many county codes exist that do not validate and could</p>	<p>Y - Print validation errors</p> <p>N - Do not print validation errors</p>

Parameter Name	Required?	Description	Values
		<p>needlessly create a long report with many redundant errors.</p> <p>This parameter is optional for all tapes except AMCAS.</p>	
Print Validation Summary	Yes	<p>Enter Y to print the validation summary or N to not print the validation summary. The default is Y.</p> <p>SRTLLOAD checks for non-validated codes for each pidm/ID and prints a summary by validation table/code at the end of the report for more efficient viewing and correction of errors. This summary prevents the need to search through each ID and view duplicate errors.</p> <p>SRTLLOAD should first be run in Audit Mode so that reported validation errors can be reviewed. When the errors are resolved,</p>	<p>Y - Print validation summary</p> <p>N - Do not print validation summary</p>

Parameter Name	Required?	Description	Values
		SRTLOAD should be re-run in Audit Mode to be sure all validation errors have been resolved, before running the report in Update Mode.	
Run Mode	Yes	<p>Enter U to update the database or A to run an audit report.</p> <p>Run the process in Audit Mode to determine which values are missing from Banner (for example, 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>	<p>U - Update the database</p> <p>A - Produce audit report</p>
Effective Date (AMCAS)	No	Enter the effective date for which AMCAS records should be loaded. Records having a date that is greater than or equal to this date will be loaded.	
PCU Prior College	No	Enter the degree	Degree Code

Parameter Name	Required?	Description	Values
Degree Code		code to be applied to the prior college record for PCU processing.	Validation Form (STVDEGC)

Electronic Prospect Purge Process (S RTPURG)

Updated: March 20, 2025

This process is used to delete records from the search tape and test score temporary tables. This process allows you to designate which records to purge. All data associated with search tape, test score tape, or PCU records is deleted based on the following parameter values.

Parameter Name	Required?	Description	Values
Electronic Prospect Code	Yes	Enter the electronic prospect code to be used in the purge.	Electronic Prospect Validation Form (STVPREL)
Tape ID	No	Enter the additional ID used to identify the tape during the load process.	
Term Code	No	Enter the term code of the prospect records to be purged.	Term Code Validation Form (STVTERM)
Level Code	No	Enter the level code of the prospect records to be purged.	Level Code Validation Form (STVLEVL)
Date Added	No	Enter the date the record was loaded to the temporary tables through SRTLLOAD.	
Match Status	No	Enter the match status to indicate that only records	The valid values are: <ul style="list-style-type: none"> • M - Match

Parameter Name	Required?	Description	Values
		with this match status should be purged.	<ul style="list-style-type: none"> • N - No Match/ New • D - Duplicate • S - Suspense
Load Status	No	Enter the load status to indicate that only records with this load status should be purged.	The valid value is C - Created.
Date Loaded	No	Enter the date when records to be purged were originally loaded into Banner Student.	
Print Detail on Report	No	Enter Y to print the detail or N to not print the detail.	Y - Print detail N - Do not print detail
Run Mode (A = Audit, U = Update)	Yes	Enter U to update the database or A to run an audit report. Run the process in Audit mode to determine which records will be removed from the temporary tables.	A - Audit mode U - Update mode
Student Type	No	Enter the student type codes to be purged or leave blank for all student types.	Student Type Code Validation Form (STVSTYP)

PCU Processing

Updated: August 27, 2020

You can run this process by student types, using the Student Type parameter.

This parameter is optional, and multiple values may be entered. If left blank, all incoming student types will be processed for the prospect code and tape ID. The parameter is validated against the Student Type Code Validation Form (STVSTYP).

For each student type code that is entered in the parameter, only records on the incoming file with matching student types will be processed. When specific student types are excluded (not entered in this parameter), they can be manually reviewed and pushed (or not) on SRIPREL or purged using SRTPURG or both. This allows you to selectively process or not process PCU student types.

If Null student types need to be processed, all applicable student types should be processed first, so that only the Null types remain. Leave the Student Type parameter blank, and the Null student types will be picked up, as they will be the last types that remain during processing.

Note: The Student Type parameter is used mainly for PCU processing, but it is valid for all electronic prospect codes. Only the PCU file currently provides an incoming variable for the student type.

Student type values for other files (SAT, ACT, etc.) will be Null, or they will use the default student type for the specific electronic prospect code that was updated on SRAPRED.

Recruiter to Banner interface for SRTPURG

Updated: March 20, 2025

This process will delete records that were created by the Recruiter to Banner interface. Records are deleted from the temporary tables, including the SRTFOLK, SRTRCMP, and SRTCSTM tables used with the interface.

Electronic Prospect Match Process (SRRSRIN)

Updated: August 27, 2020

This process is used to determine if a match exists between a record on the Search Tape View (SRVPREL) and Banner production data when search, test score, PCU, or AMCAS records are loaded in mass.

Users should review how Common Matching works with electronic prospect processing when using SRRSRIN and SRRPREL.

The process uses the interface code, its corresponding matching source code, and the rules established on the Common Matching Rules Form (GORCMRL) to determine if a record on SRVPREL has a match in Banner. 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 matching rules on GORCMRL, you are not able to re-match 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), **S** (Suspense), **D** (Duplicate), or **E** (Error). The **S** and **D** records can be viewed and updated on the Common Matching Entry Form (GOAMTCH) which is accessed from the Electronic Prospect Inquiry Form (SRIPREL).

Duplicate Processing

Updated: August 27, 2020

SRRSRIN will mark data load records as duplicates (**D**) when it finds matching information for the same data load ID.

Duplicates can result from having multiple records delivered on a single data load for a student. Students can submit more than one request to send a report to your institution within the same reporting period. Students may also take a test more than one time and not provide consistent identifying information. Duplicates can also result if SRTLOAD is run more than one time with the same data load ID, and the matching process is not executed between loads.

For example:

1. Records are loaded by SRTLOAD with PREL code SAT and data load ID of `sat1`.

2. For some reason the matching process is not run, and the records not purged. They remain unprocessed in the temporary tables.
3. SRTLOAD is run again for the same PREL code SAT and data load ID of `sat1`.
4. When the matching process is run, each of the IDs can be flagged as duplicate.

The Auto Load (Skip Dup Chk) parameter is used to bypass the flagging of duplicates by SRRSRIN and to automatically load records to Banner. Auto load processing replaces the manual processing of matching and loading those duplicates on SRIPREL. When the Auto Load (Skip Dup Chk) parameter is set to `Y`, the matching process is invoked, and `NEW` or `MATCHED` prospects are flagged. Those prospects are immediately loaded to Banner. Duplicate checking does not occur.

Using the Auto Load Parameter

Updated: August 27, 2020

When the Auto Load (Skip Dup Chk) parameter is set to `N`, records will be flagged with a match status only.

The records are not loaded to Banner, until SRRPREL is run after the match status codes have been applied by SRRSRIN. When the Auto Load (Skip Dup Chk) parameter is set to `Y`, a match status is determined, and the records will automatically be loaded to Banner.

SRRSRIN will not load recruits to Banner when the Auto Load (Skip Dup Chk) parameter is set to `Y`, if data does not conform to API restrictions. When records with a matched (`M`) or new (`N`) status are flagged, the records will not be loaded to Banner when the Auto Load (Skip Dup Chk) parameter is set to `Y` if information required to create the record (such as an address) is incomplete.

SRRSRIN will flag records with incomplete addresses or other incomplete information as having a status of suspense (`S`), and these suspended records will need to be fixed manually on SRIPREL and GOAMTCH. If the incomplete data is not corrected, SRRSRIN will not load incomplete/incorrect records to Banner and will continue to change the match status back to `S` until the issue is resolved.

Note: SRRSRIN is the only process that generates records with a match status of `N`. All records that are processed manually on SRIPREL using GOAMTCH will have a match status of `M`, even when you choose to create a new record. This is due to the fact that when you return to SRIPREL, the person's record will have been created in Banner by

GOAMTCH.

Here is an example of SRRSRIN output when incomplete addresses are found after the process is run with the Auto Load (Skip Dup Chk) parameter set to Y.

ID	Name	Status	Term	Level	Major	High School	Result
P00002378	Adams, Adam	S	199510	UG	ARTS	UNKNHS	Prospect not loaded
A00024505	Adams, Alison	M	199510	UG	ARTS	UNKNHS	Loaded 29-NOV-2004
P00002429	Adebowale, Morayo	S	199510	UG	ARTS	UNKNHS	Prospect not loaded
A00027348	Albert, Dawn	M	199510	UG	ARTS	UNKNHS	Loaded 29-NOV-2004

When SRRSRIN is run with the Auto Load (Skip Dup Chk) parameter set to N, (and the load process will later be accommodated by SRRPREL), there is no address check, so records will be flagged as matched (M) or new (N), whether they have complete address information or not.

Because records on a data load with incomplete data, such as incomplete addresses, will not be loaded to Banner, SRRPREL works so that records that were flagged N or M, and also have incomplete data, will have the match status changed to S. Again, these suspended records will need to be fixed manually on SRIPREL and GOAMTCH. It is very important to fix the incorrect or missing information or both at this point, before continuing the matching process. If the incomplete data is not corrected, SRRSRIN will not load the incomplete records.

Here is an example of SRRPREL output when incomplete addresses are found after SRRSRIN is run with the Auto Load (Skip Dup Chk) parameter set to N.

ID	Name	Status	Term	Level	Major	High School	Result
A00023291	Abrams, Anthony	S	199510	UG	ARTS	UNKNHS	Prospect not loaded
A00024505	Adams, Alison	M	199510	UG	ARTS	UNKNHS	Loaded 30-NOV-2004
A00027662	Martinez, Robert	S	199510	UG	ARTS	UNKNHS	Prospect not loaded

When using SRIPREL, if an attempt is made to load a matched (M) or new (N) record (the Create Recruit item is selected from the Options Menu), and data is incomplete, an error is displayed in the message: *Error: Data Error. Prospect has been put into suspense*. At this point, the match status for the record is changed back to S. You can then navigate to GOAMTCH to update the incomplete data (such as missing address information) and match the record appropriately.

Using the Auto Load (Skip Dup Chk) parameter with PCU processing

Updated: August 27, 2020

If the Auto Load (Skip Dup Chk) parameter is set to N (perform duplicate processing), and the Student Type parameter is updated, a match status will be assigned for the student types that have been entered.

When the Student Type parameter is blank, a match status will be assigned to all student types.

If the Auto Load (Skip Dup Chk) parameter is set to Y (load new and matched IDs), and the Student Type parameter is updated, a match status will be assigned for the student types that have been entered, and the records will be loaded to Banner. When the Student Type parameter is blank, a match status will be assigned to all student types, and the records will be loaded to Banner.

PCU Processing for SRRSRIN

Updated: August 27, 2020

You can run this process by student types, using the Student Type parameter.

This parameter is optional, and multiple values may be entered. If left blank, all incoming student types will be processed for the prospect code and data load ID. The parameter is validated against the Student Type Code Validation Form (STVSTYP).

For each student type code that is entered in the parameter, only records on the incoming file with matching student types will be processed. When specific student types are excluded (not entered in this parameter), they can be manually reviewed and pushed (or not) on SRIPREL or purged or both using SRTPURG. This allows you to selectively process or not process PCU student types.

If Null student types need to be processed, all applicable student types should be processed first, so that only the Null types remain. Leave the Student Type parameter blank, and the Null student types will be picked up, as they will be the last types that remain during processing.

Note: The Student Type parameter is used mainly for PCU processing, but it is valid for all electronic prospect codes. Only the PCU file currently provides an incoming variable for the student type.

Student type values for other files (SAT, ACT, etc.) will be Null, or they will use the default student type for the specific electronic prospect code that was updated on SRAPRED.

Parameter Name	Required?	Description	Values
Electronic Prospect Code	Yes	Enter the electronic prospect code to determine which records in the Search Tape View (SRVPREL) will be processed. This parameter works with STVPREL and STVINFC to	Electronic Prospect Validation Form (STVPREL)

Parameter Name	Required?	Description	Values
		associate the data load file with the common matching source for the appropriate matching rules.	
Tape ID	No	Enter the code for the prospect tape (data load) ID to further define which records to process.	
Report Type (if Parm 04 = N)	Yes	Enter the report type value for the detail you want to show on the report: <ul style="list-style-type: none"> • E(errors) • N (new) • M (match) • A (all) 	E - Errors N - New M - Match A - All
Auto Load (Skip Dup Chk)	Yes	Enter Y to automatically load new or matched IDs or N to perform duplicate processing. The default is N.	Y - Load new/ matched IDs N - Perform duplicate processing
Student Type	No	Enter the student type codes to be processed or leave blank for all student types.	Student Type Code Validation Form (STVSTYP)

Migrate Electronic Prospects Process (SRRPREL)

Updated: August 27, 2020

This process is used to create or update Banner recruiting and admissions records for the records in the search tape temporary records, including AMCAS and PCU records, depending on how the parameters are set.

SRRPREL processes all search, test score tape, and AMCAS records that have a match status of **N** (New), **M** (Matched), or **A** (All) or rows with a match status set to **M** or **N** (depending on the parameter value selected). After a record has been loaded, its load status is set to **C**.

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.

Use the `CREATENEWAPPL` rule on SAAERUL for the group equal to PREL to create an application record at the same time a recruit record is created by SRRPREL. When this rule is set to **Y**, the `sakmods.p_create_application` package is called to create an application record. When this rule is set to **N**, a corresponding application record is not created.

SRRPREL displays alphanumeric scores for AMCAS alpha test score data. Alpha scores are reported against the same test codes as numeric scores, in addition to the same test date. The alpha score test date corresponds to the numeric score that has been placed on hold, canceled, or deleted. Test score information that is out of range or is for an incoming score that may have changed for the same test code taken on the same test date is included in the report for informational purposes.

For PCU Processing

Updated: August 27, 2020

You can run this process by student types, using the Student Type parameter.

This parameter is optional, and multiple values may be entered. If left blank, all incoming student types will be processed for the prospect code and tape ID. The parameter is validated against the Student Type Code Validation Form (STVSTYP).

For each student type code that is entered in the parameter, only records on the incoming file with matching student types will be processed. When specific student types are excluded (not entered in this parameter), they can be manually reviewed and pushed (or not) on SRIPREL or purged or both using SRTPURG. This allows you to selectively process or not process PCU student types.

If Null student types need to be processed, all applicable student types should be processed first, so that only the Null types remain. Leave the Student Type parameter blank, and the Null student types will be picked up, as they will be the last types that remain during processing.

Note: The Student Type parameter is used mainly for PCU processing, but it is valid for all electronic prospect codes. Only the PCU file currently provides an incoming variable for the student type.

Student type values for other files (SAT, ACT, etc.) will be Null, or they will use the default student type for the specific electronic prospect code that was updated on SRAPRED.

Parameter Name	Required?	Description	Values
Electronic Prospect Code	Yes	Enter the electronic prospect code of the records to be migrated to Banner.	Electronic Prospect Validation Form (STVPREL)
Tape ID	No	Enter the code for the prospect tape ID or leave blank to load all records with the specified electronic prospect code.	
Match Status	Yes	Enter M to select only matched rows, N for new rows, or A for all rows.	M - Matched rows N - New rows
Student Type	No	Enter the student type codes to be	Student Type Code Validation Form

Parameter Name	Required?	Description	Values
		processed or leave blank for all student types.	(STVSTYP)

Electronic Prospect Email Process (SRREMAL)

Updated: August 27, 2020

This process is used for sending out a mass mailing as an email letter to any individual with an electronic prospect record.

This process selects the processing population from the Electronic Prospects View (SRVPREL). For each electronic prospect processed, an email will be created based on the email letter defined on SOAELTR. This process requires that the letter defined on SOAELTR have a module type of P. The module type is defined for the letter on SOAELTL.

This process lists all persons selected from SRRPREL. If the electronic prospect does not have an email address, a missing email error message is printed. No email can be sent to these individuals, and a paper letter will need to be sent. This process does not report the emails returned due to email addresses that are not valid. That information will be returned to the inbox of the "from" email address which is the ID that processes the job through Banner job submission.

The From Email Address will default to "jobsub" if the process is run from job submission and the From Email Address parameter is left blank or the operating system is VMS, or will default to the user ID of the person running the process from the operating system prompt. Use the FROM Email Address parameter to indicate a from address other than "jobsub" or an Oracle ID.

This process requires that email can be sent from the server where the process is run. This process has the option of testing the email process. If the process is submitted with the Print to Log parameter set to **Y**, the email messages will be printed to the log file and not sent.

The email letter itself is written to a disk file in ASCII format. The available formatting on SOAELTR includes a new line and new paragraph. If a row in SOAELTR has a new line format, and a data column which expands to blanks, and no text, the blank line will not be printed. The horizontal rule format option is not available for the ASCII email letter. This is

available for the Web Admissions Signature Page.

Note: This process uses the sendmail command on UNIX and VMS platforms.

The following errors may be encountered when using the `sokemal.p_sendmail` package with the SOKEMAL procedure, both of which use the Oracle API `UTL_SMTP`.

- *ORA-20001: 421 Service not available*
This indicates that the mailhost entered is not correct. Check with the system administrator for assistance in obtaining the correct mailhost name.
- *ORA-20002: 550 5.1.1 mailto:jdoe@xxx.com. User unknown*
This indicates that the email address being sent is not valid. The email processes (SAREMAL, SOREMAL, and SRREMAL) will not stop running. The error will print in the detail on the report output.
- *ORA-29540: class oracle/plsql/net/TCPConnection does not exist*
This indicates that the correct Java classes are not installed. Refer to the third party documentation *Oracle8i Supplied PL/SQL Packages Reference Release 2 (8.1.6) (Part# A76936-01), Chapter 65*, for more information.

Parameter Name	Required?	Description	Values
Email Letter Code	Yes	Enter the email letter code defined for the electronic prospect email letter.	HTML Letter Rules Form (SOAELTL)
Electronic Prospect ID	No	Enter the ID of the electronic prospect when you are running the process for a single ID.	
PREL Code	No	Enter the code for the electronic prospect or leave blank for all.	Electronic Prospect Validation Form (STVPREL)
Tape ID	No	Enter the tape ID for the tape ID for the electronic prospect records to be	

Parameter Name	Required?	Description	Values
		included or leave blank for all.	
Term Code	No	Enter the term code for the electronic prospect records to be included in the email processing.	Term Code Validation Form (STVTERM)
Creation Start Date	No	Enter the start date when the prospects were created in DD-MON-YYYY format.	
Creation End Date	No	Enter the end date when the prospects were created in DD-MON-YYYY format.	
Load Status	No	Enter the load status for the prospect records to be included. Enter C for loaded to Banner or leave blank for not loaded to Banner.	C - Loaded to Banner Blank - Not loaded to Banner
Print Email to Log or Send	No	Enter L to print the email to a log file and not send it. Enter S to send the email to the student. The default is S.	L - Print to log S - Send email
Email Subject Text	No	Enter the subject text for the email.	
FROM Email Address	Yes	Enter the from email address for the email letter with the user ID and host	

Parameter Name	Required?	Description	Values
		<p>(that is, <i>mailto:jdoe@xxx.com</i>). The default address is the one for the ID that is running the process.</p> <p>The email address is not validated by the TCP connection. You can enter an email address that is not valid, and the email will still be sent.</p> <p>This parameter is required for use with the Oracle Mail API.</p>	
Email Sender's Name	No	<p>Enter text to show the name of the sender and the email address to personalize the email. For example, enter "John Doe" <mailto:jdoe@college.edu> as the sender instead of <i>mailto:jdoe@college.edu</i>. This parameter is used with the FROM Email Address parameter.</p>	
Mail Host	Yes	Enter the mail host	

Parameter Name	Required?	Description	Values
		from which the email will be sent (that is, mailhost.xxx.edu). This information is available from the system administrator and is the name of the mail TCP Connection.	

Recruiter Prospect Provisioning Process (SRRRPRO)

Updated: August 27, 2020

The Recruiter Prospect Provisioning Process (SRRRPRO) is used to provision Recruiter with Banner prospects, for further processing in Recruiter.

Note: System locale variables must be set to UTF-8 for Unicode compatibility (example, `LANG=en_US.UTF-8`), because the .csv files that are generated by the provisioning processes (SRRRVAL and SRRRPRO) contain a Byte Order Mark at the beginning of the file.

If you FTP these .csv files, it must be done in binary mode, as ASCII mode will corrupt the Byte Order Mark. Refer to *FAQ 1-3YSCJ8* for more information about Banner UTF-8 configuration.

Prospects are selected for provisioning if they have Banner recruit records (SRBRECR) for the specified term range, and they do not have any application records (SARADAP). If they have multiple recruit records for the term range, the record with the highest term is selected. The pool of prospects can be limited using a population selection, as long as the prospects have existing recruit records for the specified term range and do not have application records.

This process can be run during system implementation to capture the initial set of prospects and then periodically thereafter to capture new prospects that have been added in Banner (such as through financial aid date loads). Multiple .csv files are created

for a prospect. Besides the main prospect file, files containing prospect high schools, prior colleges, and interests are also generated.

This process extracts the Banner data into .csv files which can then be imported into the Recruiter system. The .csv files may be edited before the data is imported the data into Recruiter.

Note: You should be careful editing the .csv files in spreadsheet format, as leading zeros are sometimes removed.

The process allows for the provisioning of distinct prefix and suffix values that exist for Banner prospects within the specified term range. Prefixes and suffixes are extracted into their own .csv files and should be imported into Recruiter before prospect data is imported, so that prefix and suffix validation errors do not occur in Recruiter when prospects are imported.

The .lis file generated by this process contains the Control Report and informational messages about prospects who are being provisioned. See the report sample that follows for examples of these messages.

csv files for SRRRPRO

Updated: August 27, 2020

Listed below are the .csv files created by this process, showing the Recruiter fields into which the data will be imported and the Banner fields from which the data was extracted.

.csv file	Recruiter Display Name	Banner Data Field
ProvisionPrefix.csv	Prefix Name	SPBPERS_NAME_PREFIX
ProvisionSuffix.csv	Suffix Name	SPBPERS_NAME_SUFFIX
ProvisionProspect.csv	SSN	SPBPERS_SSN
	erpid	SPRIDEN_ID
	First Name	SPRIDEN_FIRST_NAME
	Middle	SPRIDEN_MI
	Last Name	SPRIDEN_LAST_NAME
	Prospect 1 Suffix	SPBPERS_NAME_SUFFIX
	Birth Date	SPBPERS_BIRTH_DATE

.csv file	Recruiter Display Name	Banner Data Field
	Is this an International Address?	Value is Yes or Null, based on SPRADDR_NATN_CODE
	Address 1: Street 1	SPRADDR_STREET_LINE1
	Address 1: Street 2	Concatenated SPRADDR_STREET_LINE2 , SPRADDR_STREET_LINE3 , and SPRADDR_STREET_LINE4
	Address 1: Street 3	Concatenated SPRADDR_ZIP and SPRADDR_CITY for international addresses only, otherwise Null
	Address 1: City	SPRADDR_CITY
	Primary Address State/ Province	SPRADDR_STAT_CODE
	Address 1: ZIP/Postal Code	SPRADDR_ZIP
	Address 1: Country	SPRADDR_NATN_CODE
	Academic Program of Interest	SRBRICC_SURROGATE_ID
	Email Address	GOREMAL_EMAIL_ADDRES S
	Address 1: Home Phone	Concatenated SPRTELE_CTRY_CODE_PH ONE, SPRTELE_PHONE_AREA, SPRTELE_PHONE_NUMBER , and SPRTELE_PHONE_EXT
	Prospect Source	SRRRSRC_SBG_I_CODE
	Anticipated Entry Term	SRBRECR_TERM_CODE
	Relationship Type	Value is Prospective Student

.csv file	Recruiter Display Name	Banner Data Field
	Admit Type	SRBRECR_STYP_CODE
	Prospect Prefix	SPBPERS_NAME_PREFIX
	Nickname	SPBPERS_PREF_FIRST_NAME
	Prospect Gender	Value is Male, Female, or Null, based on SPBPERS_SEX
	Ethnicity	Value is Hispanic/Latino or Non-Hispanic/Latino, based on SPBPERS_ETHN_CDE
	Race Code 1	Value is Yes or No, based on GORRACE_RRAC_CODE
	Race Code 2	Value is Yes or No, based on GORRACE_RRAC_CODE
	Race Code 3	Value is Yes or No, based on GORRACE_RRAC_CODE
	Race Code 4	Value is Yes or No, based on GORRACE_RRAC_CODE
	Race Code 5	Value is Yes or No, based on GORRACE_RRAC_CODE
	Address 1: County	STVCNTY_DESC for SPRADDR_CNTY_CODE
	Address 1: Cellphone	Concatenated SPRTELE_CTRY_CODE_PHONE, SPRTELE_PHONE_AREA, SPRTELE_PHONE_NUMBER, and SPRTELE_PHONE_EXT
	Marital Status	SPBPERS_MRTL_CODE
	Citizenship Status	SPBPERS_CITZ_CODE

.csv file	Recruiter Display Name	Banner Data Field
	Religious Affiliation	SPBPERS_RELG_CODE
	Location	SORLCUR_CAMP_CODE
	Enterprise System ID	GOBUMAP_UDC_ID
ProvisionProspectColl.csv	erpid	SPRIDEN_ID
	College	SORDEGR_SBGI_CODE
	Graduated	Value is Yes or No, based on SORDEGR_DEGC_DATE
	Attended From Month	Value is name of month, derived from SORDEGR_ATTEND_FROM
	Attended From Year	Value is four-digit year, derived from SORDEGR_ATTEND_FROM
	Attended To Month	Value is name of month, derived from SORDEGR_ATTEND_TO
	Attended To Year	Value is four-digit year, derived from SORDEGR_ATTEND_TO
	Self-reported GPA	SORDEGR_GPA_TRANSFER RED
ProvisionProspectHS.csv	erpid	SPRIDEN_ID
	High School	SORHSCH_SBGI_CODE
	Graduated	Value is Yes or No, based on SORHSCH_GRADUATION_D ATE
	Attended To Month	Value is name of month, derived from SORHSCH_GRADUATION_D ATE
	Attended To Year	Value is four-digit year, derived from SORHSCH_GRADUATION_D

.csv file	Recruiter Display Name	Banner Data Field
		ATE
	Self-reported GPA	SORHSCH_GPA
	Self-reported Class Rank	SORHSCH_CLASS_RANK
	Self-reported Class Size	SORHSCH_CLASS_SIZE
ProvisionProspectInts.csv	erpid	SPRIDEN_ID
	Extracurricular Activity Type	SORINTS_INTS_CODE

MEP

Updated: August 27, 2020

The Recruiter Prospect Provisioning Process (SRRRPRO) uses MEP processing.

The institution name (VPDI_CODE) is appended to the files produced by the report when the environment uses MEP. For example, in a non-MEP environment, the prospect .csv file is named `ProvisionProspect.csv`. In a MEP environment, the filename would be `ProvisionProspect_nnnnnn.csv`, where “NNNNNN” is the institution name.

For institutions using MEP, the user's context will be concatenated onto the .csv filename. For example, if the user who runs the process is logged into Banner for the NORTH institution, the .csv files will be named `ProvisionPrefix_NORTH.csv`, `ProvisionSuffix_NORTH.csv`, and so on. If the user is logged into Banner for the SOUTH institution, the .csv files will be named `ProvisionPrefix_SOUTH.csv`, `ProvisionSuffix_SOUTH.csv`, and so on.

Use the following parameters to run SRRRPRO.

Name	Required?	Description	Values
Start Term	Yes	Enter the start term to be used for provisioning the prefix, suffix, and prospect information. The default is 999999.	Term Code Validation Form (STVTERM)

Name	Required?	Description	Values
		If 999999 is entered, no data will be provisioned.	
End Term	Yes	Enter the end term to be used for provisioning the prefix, suffix, and prospect information. The default is 999999.	Term Code Validation Form (STVTERM)
Provision Prefix	No	Enter y to create the ProvisionPrefix.csv file or leave Null to not create the file. The default is Null.	Y - Create Prefix file Null - Do not create file
Provision Suffix	No	Enter y to create the ProvisionSuffix.csv file or leave Null to not create the file. The default is Null.	Y - Create Suffix file Null - Do not create file
Provision Prospect	No	Enter y to create the ProvisionProspect.csv file or leave Null to not create the file. The default is Null.	Y - Create Prospect file Null - Do not create file
Domestic Address Nation Code	Yes	Enter the nation code for the domestic address. Multiple values can be entered.	Nation Code Validation Form (STVNATN)
Address Hierarchy	Yes	Enter the address	Address Type Code

Name	Required?	Description	Values
		priority and address type code associated with the prospect information, such as 1MA. Multiple values can be entered.	Validation Form (STVATYP)
Home Phone Hierarchy	Yes	Enter the home phone priority and phone type code associated with the prospect information, such as 1HO. Multiple values can be entered.	Telephone Type Validation Form (STVTELE)
Cell Phone Hierarchy	Yes	Enter the cell phone priority and phone type code associated with the prospect information, such as 1CELL. Multiple values can be entered.	Telephone Type Validation Form (STVTELE)
Email Hierarchy	Yes	Enter the email address priority and address type code associated with the prospect information, such as 1HOME. Multiple values can be entered.	E-mail Address Type Validation Form (GTVEMAL)
Include Confidential	No	Enter Y to include prospects whose information is flagged as confidential or leave Null to not include	Y - Include confidential prospects Null - Do not include

Name	Required?	Description	Values
		those records.	confidential prospects
Default Source Code	Yes	<p>Enter the source/background institution code associated with the prospect information.</p> <p>The code entered must have the Source Indicator checked on STVSBGI.</p>	Source/Background Institution Code Validation Form (STVSBGI)
Interface Code	Yes	Enter the interface code that is associated with the STVPREL code being used for Recruiter.	Interface Validation Form (STVINFC)
Include if no academic program	No	<p>Enter Y to include prospects whose curriculum records have not been converted to academic program names on the Recruiter Integration Curriculum Crosswalk Form (SRARICC).</p> <p>When set to Y, any prospect for whom an academic</p>	<p>Y - Include prospects with no academic programs</p> <p>Null - Do not include prospects who have no academic programs</p>

Name	Required?	Description	Values
		<p>program name cannot be found on SRARICC will be listed on the report, along with the prospect's curriculum data.</p> <p>The institution may want to create a record on SRARICC for this curriculum and run SRRRPRO again, so the prospect's academic program is included in the data that will be imported into Recruiter.</p>	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered, with the exception of the User ID parameter.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the</p>	Application Inquiry Form (GLIAPPL)

Name	Required?	Description	Values
		people who will be processed in the load from the selection identifier and application code entered.	
Selection ID	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Form (GLISLCT). All or none of the population selection parameters must be entered, with the exception of the User ID parameter.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered, with the exception of the User ID parameter.	

Name	Required?	Description	Values
User ID	No	<p>Enter the user ID for the population selection.</p> <p>If this parameter is <code>Null</code>, and the above three parameters were entered, the process will use the Banner logon user ID.</p>	

Recruiter Validation Provisioning Process (SRRRVAL)

Updated: August 27, 2020

The Recruiter Validation Provisioning Process (SRRRVAL) is used to provision Recruiter with high school and college validation codes from Banner. This ensures that the same high school and college validation codes are used in the Recruiter system as in Banner when possible.

Note: System locale variables must be set to UTF-8 for Unicode compatibility (example, `LANG=en_US.UTF-8`), because the .csv files that are generated by the provisioning processes (SRRRVAL and SRRRPRO) contain a Byte Order Mark at the beginning of the file.

If you FTP these .csv files, it must be done in binary mode, as ASCII mode will corrupt the Byte Order Mark. Refer to *FAQ 1-3YSCJ8* for more information about Banner UTF-8 configuration.

This process can be run by a Banner institution that has newly installed the Recruiter system. (It can also be run if new high school and validation codes are added to Banner.) The process extracts Banner high school and college institution data into a .csv file, which can then be imported into the Recruiter system. The .csv file may be edited before it is imported.

Note: Data from other validation tables is provisioned through RESTful APIs with existing inbound and outbound messages. These APIs are part of the Banner Integration Manager

(BRIM).

csv files for SRRRVAL

Updated: August 27, 2020

Below is the .csv file created by this process, showing the Recruiter fields into which the data will be imported and the Banner fields from which the data was extracted.

.csv file	Recruiter Display Name	Banner Data Field
ProvisionInstitution.csv Contains only records where STVSBGI_TYPE_IND is H or C	Account Name	STVSBGI_DESC
	Account Number	SOBCNVT_CONV_CODE for table SBGH, or STVSBGI_CODE, or Null, based on setting of the Are CEEB codes used on STVSBGI parameter (parameter 23)
	Feeder Organization	Value is No
	Available for Lookup	Value is Yes if SOBSBGI_STAT_CODE is Not Null, otherwise No
	Organization Type	Value is High School or College
	Institution Type	Value is Null
	Address 1: Street 1	SOBSBGI_STREET_LINE1
	Address 1: Street 2	Concatenated SOBSBGI_STREET_LINE2 , SOBSBGI_STREET_LINE3 , and

.csv file	Recruiter Display Name	Banner Data Field
		SOBSBGI_STREET_LINE4
	Address 1: Street 3	Concatenated SOBSBGI_ZIP and SOBSBGI_CITY for international addresses only, otherwise Null
	Address 1: City	SOBSBGI_CITY
	State	SOBCNVT_CONV_CODE for table STAT, or SOBSBGI_STAT_CODE
	Address 1: ZIP/Postal Code	SOBSBGI_ZIP
	Country	SOBCNVT_CONV_CODE for table NATN, or SOBSBGI_NATN_CODE
	Is International	Value is Yes or Null, based on SOBSBGI_NATN_CODE
	Organization Code	STVSBGI_CODE

MEP for SRRRPRO

Updated: August 27, 2020

The Recruiter Validation Provisioning Process (SRRRVAL) uses MEP processing.

The institution name (VPDI_CODE) is appended to the files produced by the report when the environment uses MEP. For example, in a non-MEP environment, the STVTERM code .csv file is named ProvisionTerm.csv. In a MEP environment, the filename would be ProvisionTerm_nnnnnn.csv, where "NNNNNN" is the institution name.

For institutions using MEP, the user's context will be concatenated onto the .csv filename. For example, if the user who runs the process is logged into Banner for the NORTH institution, the .csv files will be named ProvisionPrefix_NORTH.csv, ProvisionSuffix_NORTH.csv, and so on. If the user is logged into Banner for the SOUTH institution, the .csv files will be named ProvisionPrefix_SOUTH.csv, ProvisionSuffix_SOUTH.csv, and so on.

Use the following parameters to run SRRRVAL.

Parameter Name	Required?	Description	Values
Provision STVSBGI HS & College	No	Enter Y to create the ProvisionInstitution.csv file or leave Null to not create the file. The default is Null.	Y - Create Institution file Null - Do not create file
Max number of records per file	No	Enter the maximum number of records to be written to each high school/college file or leave Null to write all records to one file. If a value is entered, each high school/college file will contain only that number of records, and subsequent file names will be generated with the next one-up number. For example, the initial file will be named ProvisionInstitutions.csv. The second file will be named ProvisionInstitutions2.csv, and so on.	
Are CEEB codes	No	Enter Y if the	Y - Valid CEEB codes

Parameter Name	Required?	Description	Values
used on STVSBGI		STVSBGI codes are valid CEEB codes or N if they are not valid CEEB codes.	N - Not valid CEEB codes
Domestic Address Nation Code	No	Enter the nation code for domestic high school and college addresses. Multiple values can be entered.	Nation Code Validation Form (STVNATN)
Interface Code	Yes	Enter the interface code associated with the STVPREL code that is used with Recruiter.	Interface Validation Form (STVINFC)

Recruiter Integration Curriculum Crosswalk Process (SRRRICC)

Updated: August 27, 2020

The Recruiter Integration Curriculum Crosswalk Process (SRRRICC) generates academic programs names from existing curriculum data using a rule defined on the Business Rules Form (GORRSQL).

A sample SQL statement is delivered as seed data for use on GORRSQL for the **Process** value (nnn) and the **Rule** value nnn_CURR_CROSSWALK, where nnn is the value you entered during installation. The SQL statement can be modified to fit your requirements.

The delivered statement uses existing curriculum data to derive academic program names and populate the Recruiter Integration Curriculum Crosswalk Table (SRBRICC). Each academic program name must be unique. If multiple curriculum records result in the same academic program name, only one is written to SRBRICC, and the duplicates are listed on the Control Report.

After the initial run of SRRRICC, if a large number of duplicate academic program names is reported, you may want to delete all records from SRBRICC, refine the GORRSQL

statement that is used to build the academic program name, and rerun the process to generate the SRBRICC records. If only a small number of duplicates is reported, you may choose to create academic program names for those few curriculum records by adding them manually on the Recruiter Integration Curriculum Crosswalk Form (SRARICC). After the data has been populated, it can be reviewed and maintained on SRARICC.

This process can be rerun at any time to create academic program names for new curriculum records that have been added to Banner after the initial run. After this process is run, the Recruiter Validation Provisioning Process (SRRRVAL) should be run to provision Recruiter with the academic programs.

Parameter Name	Required?	Description	Values
Process Code	Yes	Enter the process code from the Business Rules Form (GORRSQL) to be used for the curriculum crosswalk.	Business Rule Process Code Validation Form (GTVSQPR)
Start Date	Yes	Enter the start date for the query of curriculum records.	

Admissions

Updated: August 27, 2020

Admissions Count by College/Major Report (SARACTM)

Updated: August 27, 2020

This report is used to produce admission application counts with totals by major and college.

Parameter Name	Required?	Description	Values
Entry Term	Yes	Enter the term code for which you want to run the admissions application counts.	Term Code Validation Form (STVTERM)
Prior Entry Term 1	Yes	Enter the first term for which you want to compare the admissions counts.	Term Code Validation Form (STVTERM)
Prior Entry Term 2	Yes	Enter the second term for which you want to compare the admissions counts.	Term Code Validation Form (STVTERM)

Admissions Application Report (SARADMS)

Updated: August 27, 2020

This report is used to list application data by ID or name, term, and application number.

Parameter Name	Required?	Description	Values
Term	No	Enter the term code for which you want	Term Code Validation Form

Parameter Name	Required?	Description	Values
		to run the admissions application report.	(STVTERM)
Admissions Type	No	Enter the admissions type code for which you want to select the admissions application information. Multiple values can be entered.	Admissions Type Code Validation Form (STVADMT)
Student Type	No	Enter the student type code for which you want to select the admissions application information. Multiple values can be entered.	Student Type Code Validation Form (STVSTYP)
Major Code	No	Enter the major code for which you want to select the admissions application information. Multiple values can be entered.	Major, Minor, Concentration Code Validation Form (STVMAJR)
Degree Code	No	Enter the degree code for which you want to select the admissions application information. Multiple values can be entered.	Degree Code Validation Form (STVDEGC)
College Code	No	Enter the college code for which you	College Code Validation Form

Parameter Name	Required?	Description	Values
		want to select the admissions application information. Multiple values can be entered.	(STVCOLL)
Level Code	No	Enter the level code for which you want to select the admissions application information. Multiple values can be entered.	Level Code Validation Form (STVLEVL)
Residence Code	No	Enter the residency type code for which you want to select the admissions application information. Multiple values can be entered.	Residence Code Validation Form (STVRESL)
Application Status Code	No	Enter the application status code for which you want to select the admissions application information. Multiple values can be entered.	Admission Application Status Code Validation Form (STVAPST)
Application Decision Code	No	Enter the application decision code for which you want to select the admissions application	Admissions Application Decision Code Validation Form (STVAPDC)

Parameter Name	Required?	Description	Values
		information. Multiple values can be entered.	
Report Sequence (N = Name, I = ID)	No	Enter N to run the report in name sequence; enter I to run the report in ID number sequence.	N - Name sequence I - ID sequence

Admit Decision Calculation Report (SARBDSN)

Updated: August 27, 2020

This report is used to calculate automated decisions based on institution rules.

The process selects all application records that match the parameter values. If any of the applications have outstanding checklist items, regardless of their application status, they will not be processed and will have a message associated with them on the report. If all checklist items are received, then the process compares each applicant or application or both against the rules on SAADCSN.

Parameter Name	Required?	Description	Values
Applicant Entry Term	Yes	Enter the term code for which you want to calculate automatic decisions.	Term Code Validation Form (STVTERM)
Admissions Type	No	Enter the admissions type code for which you want to calculate automatic decisions. Multiple values can be entered.	Admission Type Code Validation Form (STVADMT)
Student Type	No	Enter the student type code for which you want to calculate automatic decisions.	Student Type Code Validation Form (STVSTYP)

Parameter Name	Required?	Description	Values
		Multiple values can be entered.	
Major Code One	No	Enter the major code for which you want to calculate automatic decisions. Multiple values can be entered.	Major, Minor, Concentration Code Validation Form (STVMAJR)
Degree Code One	No	Enter the degree code for which you want to calculate automatic decisions. Multiple values can be entered.	Degree Code Validation Form (STVDEGC)
College Code One	No	Enter the college code for which you want to calculate automatic decisions. Multiple values can be entered.	College Code Validation Form (STVCOLL)
Level Code	No	Enter the level code for which you want to calculate automatic decisions. Multiple values can be entered.	Level Code Validation Form (STVLEVL)
Residence Code	No	Enter the residency type code for which you want to calculate automatic decisions. Multiple values can be entered.	Residence Code Validation Form (STVRESL)
Application Status Code	No	Enter the application status code for which you want to calculate automatic decisions. Multiple	Admission Application Status Code Validation Form (STVAPST)

Parameter Name	Required?	Description	Values
		values can be entered.	
Application Decision Code	No	Enter the application decision code for which you want to calculate automatic decisions. Multiple values can be entered.	Admission Application Decision Code Validation Form (STVAPDC)
Apply Updates (Y = Yes, N= No)	Yes	Enter Y to update the admission decisions; enter N to run the report in Audit Mode.	Y - Update N - Audit
Program Code	No	Enter the program code for which you want to calculate automatic decisions.	
Campus Code	No	Enter the campus code for which you want to calculate automatic decisions.	Campus Code Validation Form (STVCAMP)
Citizenship Code	No	Enter the citizenship code for which you want to calculate automatic decisions.	Citizen Type Code Validation Form (STVCITZ)
Exclude Decision Code	No	Enter the admissions application decision code for students you want to exclude from processing.	Admission Application Decision Code Validation Form (STVAPDC)

Admission Decision Criteria Report (SARDCSN)

Updated: August 27, 2020

This report is used to list the automated decision rules set up by the institution on the Admissions Decision Rules Form (SAADCSN).

Parameter Name	Required?	Description	Values
Term (% for all)	Yes	Enter the term code representing the term for which you want the automated decision rules listed; enter % to select all terms in the database.	Term Code Validation Form (STVTERM)
New Term or Decision Roll	No	Enter the new term for which you want to create automated decision criteria.	Term Code Validation Form (STVTERM)
Delete Old Term After Roll (Y)	No	Enter Y to delete the old term after the automated decision rules are rolled to the new term. The default is N.	Y - Delete old term after roll N - Do not delete old term

Admissions High School Report (SORHSRP)

Updated: August 27, 2020

This report is used to print the information received from the high schools.

Parameter Name	Required?	Description	Values
Student Registration Term	Yes	Enter the term code representing the term during which	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		you are printing the high school information (for example, the effective term of the general student record and the registration term for selection).	
Admissions Entry Term	Yes	Enter the term code representing the term for which you want to print the high school information.	Term Code Validation Form (STVTERM)
Select if Student has Registr.	No	Enter Y to select the high school if the student has registration for the term entered in the Student Registration Term parameter. Leave blank to select students from all terms.	Y - Select high school N - Do not select high school Null - All terms
Select if Student has Appl.	No	Enter Y to select the high school if the student has an application for the term that was entered in the Admissions Entry Term parameter. Leave blank to select students from all admissions terms.	Y - Select high school N - Do not select high school Null - All terms
High School SBGI Code	No	Enter the source/background	Source/Background Institution Code

Parameter Name	Required?	Description	Values
		institution code for the high school, to report for a single high school.	Validation Form (STVSBGI)
State Code of High School	No	Enter the state code for the high school, to report a high school in a specific state.	State/Province Code Validation Form (STVSTAT)

Admission Purge Process (SAPADMS)

Updated: August 27, 2020

This process purges all admissions records for the specified term. It may be run in Audit or Update Mode.

Parameter Name	Required?	Description	Values
Purge Term	Yes	Enter the term code representing the term for which you want to purge the admissions data. The term entered represents the terms up to and including the term for which you would like to purge admissions data.	Term Code Validation Form (STVTERM)
Bypass Students with History	No	Enter Y to bypass students with registration or academic history or both, regardless of purge criteria. Leave	Y - Bypass students with registration or history Null - Do not bypass these students

Parameter Name	Required?	Description	Values
		blank to not bypass these students.	
Activity Date	No	Enter the date after which you want to purge all admissions activity. Use the date format DD-MON-YYYY. Any admissions activity beyond this date will not be deleted, regardless of other purge criteria.	
Purge High School Data	No	Enter χ to purge all high school data. Leave blank to not purge high school data.	Y - Purge high school data Null - Do not purge data
Purge Prior College Data	No	Enter χ to purge all prior college data. Leave blank to not purge prior college data.	Y - Purge prior college data Null - Do not purge data
Purge Test Score Data	No	Enter χ to purge all test score data. Leave blank to not purge test score data.	Y - Purge test score data Null - Do not purge data
Run Mode	Yes	Enter Δ to produce a listing of all selected purge data without affecting the database. Enter \cup to update the database after purging the	A - Audit mode U - Update mode

Parameter Name	Required?	Description	Values
		selected data.	

Appointment Purge Process (SOPAPPT)

Updated: August 27, 2020

This process purges all appointment records for the specified start and end dates. It may be run in Audit or Update Mode.

Parameter Name	Required?	Description	Values
Start Date	Yes	Enter the date from which appointments are to be deleted. Use the date format DD-MON-YYYY.	
End Date	Yes	Enter the date after which appointments are not to be deleted. Use the date format DD-MON-YYYY.	
Run Mode	Yes	Enter A to produce a listing of all selected purge data without affecting the database. Enter U to update the database after purging the selected data.	A - Audit mode U - Update mode

SAT Recentering Process (SOPSATS)

Updated: August 27, 2020

This process takes the original SAT scores loaded into Banner from the Electronic Prospect Load (SRTL0AD) and recalculates or re-centers them for compliance with the

1995 SAT requirements from the College Board.

Note: Test scores dated before April 1, 1995 may be used for re-centering. Test scores dated after April 1, 1995 are automatically centered when the test is scored.

Parameter Name	Required?	Description	Values
Run Mode	Yes	Enter A to produce a listing of students and their original and re-centered SAT scores, without affecting the database. Enter U to update the database records with the re-centered test score data.	A - Audit mode U - Update mode

AMCAS Extract File Process (SARAMXF)

Updated: August 27, 2020

This process is used to create a flat file of data to be electronically submitted to AMCAS.

Parameter Name	Required?	Description	Values
Application Term Code	Yes	Enter the term code for the current application year.	Term Code Validation Form (STVTERM)
Level Code	Yes	Enter the level code for AMCAS processing.	Level Code Validation Form (STVLEVL)
Audit/Update Indicator	Yes	Enter A for an audit report or U to update the database.	A - Audit mode U - Update mode
Matriculation Date	No	Enter the date in MMY format.	

Parameter Name	Required?	Description	Values
Expected Graduation Date	Yes	Enter the expected graduation date in MMY format.	
School Code - for multiples	No	Enter the school code value for the extract process. This value will only be used if the <code>AMCASSCHCODE</code> rule on <code>SAAERUL</code> for group <code>ADMS</code> is not entered.	
State Code - for multiples	No	Enter the state code value for the extract process. This value will only be used if the <code>AMCASSCHSTAT</code> rule on <code>SAAERUL</code> for group <code>ADMS</code> is not entered.	
Default AMCAS Campus Code	Yes	Enter the campus code to be inserted into the Admissions Action flat file if no campus code exists in the application.	
User ID	Yes	Enter the user ID of the person responsible for AMCAS Admissions Action files. This user ID will be inserted into each flat file record.	

AMCAS Date Purge Process (SARAMDP)

Updated: August 27, 2020

This process is used to purge the flat file of data that was electronically submitted to AMCAS.

Parameter Name	Required?	Description	Values
Application Term Code	Yes	Enter the term code for AMCAS processing.	Term Code Validation Form (STVTERM)
Level Code	Yes	Enter the level code for AMCAS processing.	Level Code Validation Form (STVLEVL)
Last Electronic Submission Date	Yes	Enter the date in DD-MON-YYYY format.	
Audit/Update Indicator	Yes	Enter A for an audit report or U to update the database.	A - Audit mode U - Update mode

Communication Load Process (SURLOAD)

Updated: August 27, 2020

This process is used to perform a mass entry of mail records.

Parameter Name	Required?	Description	Values
File	Yes	Enter the path and file name for the flat file of PIDMS. For example, /temp/pidms.dat.	
System Indicator	Yes	Enter the system indicator to be displayed on the Student Mail Form	System Indicator Validation Form (GTVSYSI)

Parameter Name	Required?	Description	Values
		(SUAMAIL) or to be used to populate the GURMAIL table.	
Term Code	Yes	Enter the term code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table.	Term Code Validation Form (STVTERM)
Letter Code	No	Enter the letter code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table.	Letter Code Validation Form (GTVLETR)
Module Code	No	Enter the module code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table.	
Material Code	No	Enter the material code to be displayed on the Student Mail Form (SUAMAIL) or to be used to populate the GURMAIL table.	Material Code Validation Form (STVMATL)
Date Printed	No	Enter the date printed in in DD-MON-YYYY format.	
Initials	No	Enter the initial code to be displayed on the Student Mail	Initials Code Validation Form (STVINIT)

Parameter Name	Required?	Description	Values
		Form (SUAMAIL) or to be used to populate the GURMAIL table.	
Wait Days	No	Enter the number of days between initiating and printing the letter.	
Quantity	No	Enter the quantity of materials to be sent.	
Generated or Published	Yes	Enter G for generated materials or P for published materials. G is the default.	G - Generated P - Published

Communication Removal Process (SURDELT)

Updated: August 27, 2020

This process is used to perform a mass removal of mail records.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code for the record to be deleted from the GURMAIL table.	Term Code Validation Form (STVTERM)
Material Code	No	Enter the material code for the record to be deleted from the GURMAIL table.	Material Code Validation Form (STVMATL)
System Indicator	Yes	Enter the system indicator for the record to be deleted from the GURMAIL table.	System Indicator Validation Form (GTVSYSI)

Parameter Name	Required?	Description	Values
Letter Code	No	Enter the letter code for the record to be deleted from the GURMAIL table.	Letter Code Validation Form (GTVLETR)
Module Code	No	Enter the module code for the record to be deleted from the GURMAIL table.	
Date Initiated	No	Enter the date the records were initially created.	
Activity Date	No	Enter the date for the removal in DD-MON-YYYY format.	
Initials	No	Enter the initial code for the record to be deleted from the GURMAIL table.	Initials Code Validation Form (STVINIT)
User	No	Enter the user name for the record to be deleted from the GURMAIL table.	
Audit	Yes	Enter A to produce an audit report or D to delete the records from the database.	A - Audit report D - Delete records

Source/Background Summary Report (SORSBSM)

Updated: August 27, 2020

This report is used to collect source/background institution high school summary information similar to what is found on the Source/Background Institution Summary Form (SOASBSM).

Parameter Name	Required?	Description	Values
SBGI Code	No	Enter the source/ background institution code for which reporting counts are desired.	Source/Background Institution Code Validation Form (STVSBGI)
Term Code	No	Enter the term code for the application and recruiting records you want to include in the report.	Term Code Validation Form (STVTERM)
Level Code	No	Enter the level code for the application and recruiting records you want to include in the report.	Level Code Validation Form (STVLEVL)
Campus Code	No	Enter the campus code for the application and recruiting records you want to include in the report.	Campus Code Validation Form (STVCAMP)
College Code	No	Enter the college code for the application and recruiting records you want to include in the report.	College Code Validation Form (STVCOLL)
Degree Code	No	Enter the degree code for the application and recruiting records you want to include in the report.	Degree Code Validation Form (STVDEGC)
Program Code	No	Enter the program code for the application and recruiting records	Program Definition Rules Form (SMAPRLE)

Parameter Name	Required?	Description	Values
		you want to include in the report.	
Major Code	No	Enter the major code for the application and recruiting records you want to include in the report.	Major, Minor, Concentration Code Validation Form (STVMAJR)
Student Type Code	No	Enter the student type code for the application and recruiting records you want to include in the report.	Student Type Code Validation Form (STVSTYP)
Subtotal by Campus	No	Enter Y to subtotal by term/campus/level or N to not subtotal.	Y - Subtotal N - No subtotal

Prior College Summary Report (SORPCSM)

Updated: August 27, 2020

This report is used to collect source/background institution prior college summary information similar to what is found on the Prior College Enrollment Summary Form (SOAPCSM).

Parameter Name	Required?	Description	Values
College (SBGI) Code	No	Enter the prior college source/background institution code for which reporting counts are desired.	Source/Background Institution Code Validation Form (STVSBGI)
Term Code	No	Enter the term code for the application and recruiting	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		records you want to include in the report.	
Level Code	No	Enter the level code for the application and recruiting records you want to include in the report.	Level Code Validation Form (STVLEVL)
Campus Code	No	Enter the campus code for the application and recruiting records you want to include in the report.	Campus Code Validation Form (STVCAMP)
College Code	No	Enter the college code for the application and recruiting records you want to include in the report.	College Code Validation Form (STVCOLL)
Degree Code	No	Enter the degree code for the application and recruiting records you want to include in the report.	Degree Code Validation Form (STVDEGC)
Program Code	No	Enter the program code for the application and recruiting records you want to include in the report.	Program Definition Rules Form (SMAPRLE)
Major Code	No	Enter the major code for the application and recruiting records you want to include in the report.	Major, Minor, Concentration Code Validation Form (STVMAJR)

Parameter Name	Required?	Description	Values
Student Type Code	No	Enter the student type code for the application and recruiting records you want to include in the report.	Student Type Code Validation Form (STVSTYP)
Subtotal by Campus	No	Enter Y to sort by term/level/campus or N to sort by term and level only.	Y - Term/level/campus N - Term/level

Rating Audit Report (SARDCBT)

Updated: August 27, 2020

This process is used to view applications that have been updated on the Admissions Decision and Rating Batch Entry Form (SAADCBT) for a specific date or dates.

Parameter Name	Required?	Description	Values
Term Code	No	Enter the term of the applications that have been given ratings or decisions that you would like to review.	Term Code Validation Form (STVTERM)
Decision Date From	No	Enter the decision date (beginning of range) from which you want to see records with updated decision codes.	
Decision Date To	No	Enter the decision date (end of range) by which you want to see records with	

Parameter Name	Required?	Description	Values
		updated decision codes.	
Decision Code	No	Enter the decision code for applications which have been updated on the Admissions Decision and Rating Batch Entry Form (SAADCBT).	Admission Application Decision Code Validation Form (STVAPDC)
Level Code	No	Enter the level code for applications which have been updated on Admissions Decision and Rating Batch Entry Form (SAADCBT).	Level Code Validation Form (STVLEVL)
Campus Code	No	Enter the campus code for applications which have been updated on Admissions Decision and Rating Batch Entry Form (SAADCBT).	Campus Code Validation Form (STVCAMP)
Degree Code	No	Enter the degree code for applications which have been updated on Admissions Decision and Rating Batch Entry Form (SAADCBT).	Degree Code Validation Form (STVDEGC)
Program Code	No	Enter the program code for applications which have been	Program Definition Rules Form (SMAPRLE)

Parameter Name	Required?	Description	Values
		updated on Admissions Decision and Rating Batch Entry Form (SAADCBT).	
Major Code	No	Enter the major code for applications which have been updated on Admissions Decision and Rating Batch Entry Form (SAADCBT).	Major, Minor, Concentration Code Form (STVMAJR)

Administrator Assignments Process (SORAINF)

Updated: August 27, 2020

This process allows institutions to use the rules defined on the Administrator Role Rules Form (SOAADAS) to assign administrators to recruit and applicant records.

The process populates the SORAINF table. This process also runs when you select **Assign** on the Assigned Administrators window on the Recruit Prospect Information Form (SRARECR), the Quick Recruit Form (SRAQUIK), the Quick Entry Form (SAAQUIK), and the Admissions Application Form (SAAADMS).

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code of the assignment.	Term Code Validation Form (STVTERM)
Module	Yes	Enter the module for the assignment and selection, values are A (Admissions) or R (Recruiting).	A - Admissions R - Recruiting
Update/Report	Yes	Enter U to update the	U - Update database

Parameter Name	Required?	Description	Values
Indicator		database, R to update and produce a report, or A to produce an audit report. U only updates the database. It does not produce a report.	R - Report and update database A - Audit report
Delete Existing Assignments	Yes	Enter Y to indicate that all existing assignments are to be deleted or N to not delete existing assignments.	Y - Delete assignments N - Do not delete assignments
Print Indicator	No	Enter ALL to print all assignments or TERM to print an assignment for a term and module.	ALL - Print all assignments TERM - Print all assignments for term and module
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Form (GLIEXTR) may be	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		used to review the people who will be processed in the load from the selection identifier and application code entered.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Form (GLISLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This will match the Creator ID	

Parameter Name	Required?	Description	Values
		and is the Banner login user ID. All or none of the population selection parameters must be entered.	

Electronic App Purge Process (SARETPG)

Updated: August 27, 2020

This process is used to purge data from the electronic application holding tables by date range, application type, source, term, and process indicator.

Parameter Name	Required?	Description	Values
Application Source	No	Enter the application source code for the electronic applications, or leave blank for all.	EDI Application Source Code Validation Form (STVAPLS)
Application Type	No	Enter the application type code for the electronic applications, or leave blank for all.	Application Type Code Validation Form (STVWAPP)
Term Code	No	Enter the term code for the electronic applications, or leave blank for all.	Term Code Validation Form (STVTERM)
Start Date	No	Enter the start date for when the applications were created in format DD-MON-YYYY.	
End Date	No	Enter the end date for when the	

Parameter Name	Required?	Description	Values
		applications were created in format DD-MON-YYYY.	
Process Indicator	No	To indicate which applications to select, enter P for Processed, E for Errors, V for Verified, or N for Not Processed, or leave Null for all. The default is Null .	P - Processed E - Errors V - Verified N - Not Processed Null - All
Print Detail or Print Summary	Yes	Enter D to print detail information or S to print summary information. The default is D . If D is entered, the applicant's ID, name, source, application type, term, curriculum, date created, date loaded into production, and Banner ID will be printed. If S is entered, summary information will be printed.	D - Detail S - Summary
Audit or Update	Yes	Enter A to produce an audit report or U to update the database.	A - Audit mode U - Update mode

Elec App Verify/Load Process (SARETMT)

Updated: August 27, 2020

This process matches, verifies, and loads electronic applications to Banner production tables based on the matching rules specified by the matching source code assigned to the interface code on STVINFC. The process performs the test score equivalency look-up and then stores the equivalent test scores if applicable.

This process has three report sections. The first two sections are optional and collect and print the following: successfully verified or loaded applications or both, applications with verification or load errors, and detail or summary information. The third section is the control page.

Processing Notes

Updated: August 27, 2020

The Interface Code w/Match Rules parameter provides the values for the matching algorithm, which determines if the record status is either New, Matched, Suspense, or Error. The matching needs to be done only for new applicants.

If the person is not matched to a Banner record, a new SPRIDEN row will be created for the person with either a generated ID or the SSN, the SABSTUD row will be created with a new pidm value, and the **Person Status (Indicator)** will be updated to Y. If the person matches a Banner record, the SABSTUD row will be created with the Banner pidm value, and the **Person Status (Indicator)** will be updated to Y. If the person falls into the suspense group, the **Person Status (Indicator)** will be updated to S. Applications must have a Y in the **Person Status (Indicator)** before they can be pushed into Banner production.

Interface Code w/Match Rules parameter	
If the person is not matched to a Banner record	<ul style="list-style-type: none"> a new SPRIDEN row will be created for the person with either a generated ID or the SSN the SABSTUD row will be created with a new pidm value

Interface Code w/Match Rules parameter	
	<ul style="list-style-type: none"> the Person Status (Indicator) will be updated to Y
If the person matches a Banner record	<ul style="list-style-type: none"> the SABSTUD row will be created with the Banner pidm value the Person Status (Indicator) will be updated to Y
If the person falls into the suspense group	<p>the Person Status (Indicator) will be updated to S.</p> <p>Applications must have a Y in the Person Status (Indicator) before they can be pushed into Banner production.</p>

The Previously Applied and Previously Attended elements appear in the Name section of the Web data entry pages. Assuming these elements are added to the Name section using SAAWAPP, if the student is in suspense status, and they state that they have never attended or submitted an application, the person status will be changed from Suspense to New.

If the electronic applicant read in the main select has already been through the match phase and they have a SPRIDEN record, the match step will be bypassed. This may happen in the case of applicants who are initially put into the match-suspense state. The user needs to resolve the suspense issue using SAAEAPS. They have the option of completing the verification process online after resolving the match issues and accepting the person status or re-running SARETMT.

The electronic applicant may also have a SPRIDEN record if they have been identified as an existing student at the onset of the web application process. The Web application packages already insert the PIDM in the electronic application holding tables. In this case the matching steps will also be bypassed.

If the Override App. Status Ind. parameter is set to N, then this step must be done manually on SAAEAPS, if there are any application status rules defined on STVASTA. If

there are no application status rules, the applicant's application status will automatically be set to Y.

If the Override App. Status Ind. parameter is set to Y, the applicant's **Application Status (Indicator)** will automatically be set to Y. The **Application Status (Indicator)** must be Y before the application is pushed into Banner production.

After the electronic application has been matched or determined to be new, the verification package is executed. This is the same processing as that which occurs in SAAEAPS. The verification rules follow the procedures and routines entered on SAAECRL for a given application type. After the verification process has been completed successfully, the **Process (Indicator)** on SAAEAPS is set to v for Verified. Applications must have a v in the **Process (Indicator)** field before they can be pushed into Banner production.

The last task is to load the application into Banner.

To achieve this, the following must be ensured:

- the application must be completed
- the application must have an accepted status
- the manual person and application verification **Completion Indicators** must both be Y
- the **Process (Indicator)** must be v

After the application is loaded, the **Process (Indicator)** which displays on SAAEAPS will be updated to the value P for application pushed.

Parameter Name	Required?	Description	Values
Interface Code w/ Match Rules	Yes	Enter the interface code associated with the matching rules on GORCMRL to be used in matching the application to Banner.	Interface Validation Form (STVINFC)
Application Source	No	Enter the application source code for the	EDI Application Source Code

Parameter Name	Required?	Description	Values
		electronic applications, or enter % for all.	Validation Form (STVAPLS)
Application Type	No	Enter the application type code for the electronic applications, or enter % for all.	Application Type Code Validation Form (STVWAPP)
Start Date Range	No	Enter the start date for when the applications were created in format DD-MON-YYYY.	
End Date Range	No	Enter the end date for when the applications were created in format DD-MON-YYYY.	
Term Code	No	Enter the term code for the electronic applications, or enter % for all.	Term Code Validation Form (STVTERM)
Override App. Status Ind.	Yes	Enter Y to override the application status indicator Enter N to not override the indicator. The default is Y.	Y - Override status N - Do not override
Override App. Accept Ind.	Yes	Enter Y to override the application accept indicator or N	Y - Override accept N - Do not override

Parameter Name	Required?	Description	Values
		to not override the indicator. The default is Y.	
Use Generated ID, SSN, or Web ID	Yes	Enter G to use the Generated ID, S to use the SSN, or E to use the Web ID for the application being matched, verified, and pushed. The default is G.	G - Generated ID S - SSN E - Web ID
Print Detail/Summary or Errors	Yes	Enter D for Print Detail, E for Errors, B for Both, or S for Summary. The default is D. If D is entered, the electronic application ID, Banner ID, name, application source and type, term, match status, and curriculum will be printed. If E is entered, the electronic application ID, Banner ID, name, application source and type, term, match status, and the process indicator error message will be printed.	D - Detail E - Errors B - Both S - Summary

Parameter Name	Required?	Description	Values
		If s is entered, summary information will be printed.	
Audit or Update	Yes	Enter a to produce an audit report or u to update the database.	A - Audit mode U - Update mode
Create Recruit Records Y or N	Yes	Enter y to call the <code>sakmods.p_create_recruit</code> package after the application is pushed to create a corresponding recruit record for the applicant. Enter n to not create a corresponding recruit record. The default is n .	Y - Create recruit record N - Do not create recruit record
Source Code for Recruit Record	No	Enter the SBGI source code to be inserted in the newly created recruit record. Valid values come from STVSBGI, and the SBGI source code selected will be inserted in the recruit record. The value entered into this field will be inserted in the <code>SRRRSRC_SBGI_CODE</code> field for the	Source/Background Institution Code Validation Form (STVSBGI)

Parameter Name	Required?	Description	Values
		recruit record.	

TS 189 Upload to Banner (SAR189U)

Updated: August 27, 2020

This process is used to receive an electronic (EDI) admissions application in SPEEDE (Standardization of Post-Secondary Education Electronic Data Exchange) format and to automate the entry of the admissions application data into the Banner Admissions module.

Parameter Name	Required?	Description	Values
Input File	Yes	Enter the input directory path and file name.	
Test Flag	No	Enter Y to run and print the debug messages. Enter N to not run or print the debug messages.	Y - Run debugging N - Do not run debugging
Application Type	No	Enter the application type code for the EDI applications. If the application type is entered here, the value read from the SAAERUL rule will not be used. (group of ADMS, label of EDIWAPPCODE)	Application Type Code Validation Form (STVWAPP)
Term Code	No	Enter the term code for the EDI applications.	Term Code Validation Form (STVTERM)

Student Email Process (SOREMAL)

Updated: August 27, 2020

This process is used for sending a mass mailing as an email letter using population selection on IDs for individuals with existing Banner Student records.

The process reads the population selected and requires the people have a SPRIDEN row and an email address defined on GOAEMAL. This process also requires the person have an email letter code on GURMAIL with a blank print date. If the letter does not exist for the person in GURMAIL or has already been printed, an error message will print on the report, and no email will be sent. If the letter does exist on GURMAIL, the process updates the date printed and the origin code to E on the appropriate GURMAIL record for each person.

This process reports the outcome of all records selected. This includes all persons in the population selection who do not have an email address. No email can be sent to these individuals, and a paper letter will need to be sent separately. The report also includes the people who do not have the letter recorded on GURMAIL or for whom the letter exists but has already been printed. This process does not report the emails returned because of email addresses that are not valid. That information will be returned to the in box of the FROM email address.

The From Email Address will default to `jobsub` if the process is run from job submission and the From Email Address parameter is left blank or the operating system is VMS, or will default to the user ID of the person running the process from the operating system prompt. Use the FROM Email Address parameter to indicate a from address other than `jobsub` or an Oracle ID.

This process requires that email can be sent from the server where the process is run. It is suggested for mass email mailings that the same letter be constructed using traditional letter generation procedures. The letter generation process should run directly after the email letter processing to pick up all people in the population selection who have a null print date (for example, they didn't have an email address).

This process requires that the letter be defined on SOAELTR and have a module type of A for Admissions, R for Recruiting, or S for General Student. The module type is defined for the letter on SOAELTL.

This process has the option of being run in Audit Mode. If the process is submitted with

the Print to Log parameter set to **A**, the email messages will be printed to the log file and not sent, and the print date will not be updated on the GURMAIL row.

If the initials column is filled in on the GURMAIL row for the student, the name and email address for the initials will be printed at the end of the email letter. The name and email are expanded from the STVINIT table.

The email letter itself is written to a disk file in ASCII format. The available formatting on SOAELTR includes a new line and new paragraph. If a row in the SOAELTR has a new line format, and a data column which expands to blanks and no text, the blank line will not be printed. The horizontal rule format option is not available for the ASCII email letter. This is available for the Web Admissions Signature Page.

Note: This process uses the sendmail command on UNIX and VMS platforms.

The following errors may be encountered when using the `sokemal.p_sendmail` package with the SOKEMAL procedure, both of which use the Oracle API `UTL_SMTP`.

- `ORA-20001: 421 Service not available`
This indicates that the mailhost entered is not correct. Check with the system administrator for assistance in obtaining the correct mailhost name.
- `ORA-20002: 550 5.1.1 mailto:jdoe@xxx.com ... User unknown`
This indicates that the email address being sent is not valid. The email processes (SAREMAL, SOREMAL, and SRREMAL) will not stop running. The error will print in the detail on the report output.
- `ORA-29540: class oracle/plsql/net/TCPConnection does not exist`
This indicates that the correct Java classes are not installed. Refer to the third party documentation *Oracle8i Supplied PL/SQL Packages Reference Release 2 (8.1.6) (Part# A76936-01), Chapter 65*, for more information.

Parameter Name	Required?	Description	Values
Email Letter Code	Yes	Enter the email letter code defined for the recruit/applicant/student population email letter.	HTML Letter Rules Form (SOAELTL)

Parameter Name	Required?	Description	Values
Student ID	No	Enter the student's ID when you are running the process for a single ID.	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Form (GLISLCT). All or none of the	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		population selection parameters must be entered.	
Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner login user ID. All or none of the population selection parameters must be entered.	
Term Code	No	Enter the term code for the student records to be included in the letter processing.	Term Code Validation Form (STVTERM)
Audit/Update Mode	Yes	Enter A to print the email letter to a log file and not send it. Enter U to send the email letter to the student and update GURMAIL. The	A - Print to log U - Send email

Parameter Name	Required?	Description	Values
		default is \varnothing .	
Email Subject Text	No	Enter the subject text for the email. If left blank, the subject of the email will also be blank.	
FROM Email Address	Yes	<p>Enter the from email address for the email letter with the user ID and host (that is, mailto:jdoe@college.edu). The default address is the one for the ID that is running the process.</p> <p>The email address is not validated by the TCP connection. You can enter an email address that is not valid, and the email will still be sent.</p> <p>This parameter is required for use with the Oracle Mail API.</p>	
Email Sender's Name	No	Enter text to show the name of the sender and the email address to personalize the email. For example,	

Parameter Name	Required?	Description	Values
		enter "John Doe"< mailto:jdoo@college.edu > as the sender instead of mailto:jdoo@college.edu . This parameter is used with the FROM Email Address parameter.	
Mail Host	Yes	Enter the mail host from which the email will be sent (that is, mailhost.xxx.edu). This information is available from the system administrator and is the name of the mail TCP Connection.	

Batch Email for Elec. Apps. Process (SAREMAL)

Updated: August 27, 2020

This process is used for sending out a mass mailing as an email letter to individuals who have started or completed a Web application.

This process selects the processing population from the Electronic Applicant View (SAVEAPS). For each electronic applicant processed, an email will be created based on the email letter defined on SOAELTR. This process requires that the letter defined on SOAELTR have a module type of E. The module type is defined for the letter on SOAELTL.

This process lists all electronic applicants selected. If the electronic applicant does not have an email address, a missing email address error message is printed. No email can

be sent to these individuals, and a paper letter will need to be sent. This process does not report the emails returned due to email addresses that are not valid. That information will be returned to the inbox of the `FROM` email address which is the ID that processes the job through Banner Student job submission.

The From Email Address will default to `jobsub` if the process is run from job submission and the From Email Address parameter is left blank or the operating system is VMS, or will default to the userid of the person running the process from the operating system prompt. Use the FROM Email Address parameter to indicate a from address other than `jobsub` or an Oracle ID.

This process requires that email can be sent from the server where the process is run. This process has the option of testing the email process. If the process is submitted with the Print to Log parameter set to `L`, the email messages will be printed to the log file and not sent.

The email letter itself is written to a disk file in ASCII format. The available formatting on SOAELTR includes a new line and new paragraph. If a row in SOAELTR has a new line format, and a data column which expands to blanks, and no text, the blank line will not be printed. The horizontal rule format option is not available for the ASCII email letter. This is available for the Web Admissions Signature Page.

Note: This process uses the sendmail command on UNIX and VMS platforms.

The following errors may be encountered when using the `sokemal.p_sendmail` package with the SOKEMAL procedure, both of which use the Oracle API `UTL_SMTP`.

- `ORA-20001: 421 Service not available`
This indicates that the mailhost entered is not correct. Check with the system administrator for assistance in obtaining the correct mailhost name.
- `ORA-20002: 550 5.1.1. mailto:jdoo@xxx.com ... User unknown`
This indicates that the email address being sent is not valid. The email processes (SAREMAL, SOREMAL, and SRREMAL) will not stop running. The error will print in the detail on the report output.
- `ORA-29540: class oracle/plsql/net/TCPConnection does not exist`
This indicates that the correct Java classes are not installed. Refer to the third party documentation *Oracle8i Supplied PL/SQL Packages Reference Release 2 (8.1.6) (Part# A76936-01), Chapter 65*, for more information.

Parameter Name	Required?	Description	Values
Email Letter Code	Yes	Enter the email letter code defined for the electronic applicant email letter.	HTML Letter Rules Form (SOAELTL)
Electronic Applicant ID	No	Enter the ID of the electronic applicant when you are running the process for a single ID.	
Term Code	No	Enter the term code for the electronic applicant records to be included in the email processing.	Term Code Validation Form (STVTERM)
App Create Start Date Range	Yes	Enter the start date when the applications were created in DD-MON-YYYY format.	
App Create End Date Range	Yes	Enter the end date when applications were created in DD-MON-YYYY format.	
Process Indicator	No	To indicate which applications to select, enter P for Processed, E for Errors, V for Verified, or N for Not Processed, or leave Null for all. The default is Null .	P - Processed E - Errors V - Verified N - Not Processed Null - All
Application Type	No	Enter the application type code for the	Application Type Code Validation Form (STVWAPP)

Parameter Name	Required?	Description	Values
		electronic applications, or leave blank for all.	
Application Source	No	Enter the application source code for the electronic applications, or leave blank for all.	EDI Application Source Code Validation Form (STVAPLS)
Print Email to Log (L); Send (S)	Yes	Enter L to print the email to a log file and not send it. Enter S to send the email to the student. The default is S .	L - Print to log S - Send email
Email Subject Text	No	Enter the subject text for the email.	
FROM Email Address	Yes	Enter the from email address for the email letter with the user ID and host (that is, mailto:jdoe@college.edu). The default address is the one for the ID that is running the process. The email address is not validated by the TCP connection. You can enter an email address that is not valid, and the	

Parameter Name	Required?	Description	Values
		<p>email will still be sent.</p> <p>This parameter is required for use with the Oracle Mail API.</p>	
Email Sender's Name	No	<p>Enter text to show the name of the sender and the email address to personalize the email. For example, enter "John Doe"<mailto:jdoe@college.edu> as the sender instead of mailto:jdoe@college.edu. This parameter is used with the FROM Email Address parameter.</p>	
Mail Host	Yes	<p>Enter the mail host from which the email will be sent (that is, mailhost.xxx.edu). This information is available from the system administrator and is the name of the mail TCP Connection.</p>	

Admission Rating Calculation Report (SARRATE)

Updated: August 27, 2020

This process/report is used to calculate the admissions rating for an ID or population.

This report uses the rules that have been defined by the institution on the Admissions Rating Formula Definition Form (SAARRDF). Either a population selection, an ID, or multiple IDs must be entered. When the Recalculate Existing Rating parameter is set to Y, all existing ratings are updated if the new rating calculated by SARRATE is higher than the existing rating.

Institutions who choose to use the Administrator Rating Type Rules block of the Administrator Rating Type Rules Form (SAARRCT) must run SARRATE with the Recalculate Existing Rating parameter set to Y at some point in the processing cycle. Otherwise the default rating records that have a rating set to zero will never be updated.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term code which matches the formula defined on SAARRDF that should be used by SARRATE.	Term Code Validation Form (STVTERM)
Recalculate Existing Ratings	Yes	Enter Y to recalculate existing ratings or N to not recalculate existing ratings. The default is N.	Y - Recalculate existing ratings N - Do not recalculate existing ratings
Applicant ID	No	Enter the ID (or IDs) of the applicant(s) whose rating is to be calculated	
Selection Identifier	No	Enter the code that identifies the population with which you want to	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection	

Parameter Name	Required?	Description	Values
		parameters must be entered.	
Administrator ID	Yes	Enter the ID of the administrator who is to be associated with the calculated rating.	
Rating Type	Yes	Enter the rating type code which matches the rating type of the formula defined on SAARRDF that is to be calculated.	Admissions Rating Type Validation Form (STVRATP)
Role for Administrator ID	Yes	Enter the role code to be stored with the Administrator ID for the calculated rating.	Administrative Role Code Validation Form (STVRADM)
Application Status	Yes	Enter the application status code that indicates which population of applications should be considered for a rating.	Admission Application Status Code Validation Form (STVAPST)
App Status Begin Date	Yes	Enter the beginning date for the application status in MON-DD_YYYY format.	
App Status End Date	Yes	Enter the ending date for the application status in MON-DD_YYYY format.	
Valid Test Source for Formula	Yes	Enter the test source code to be used in determining if a test score equivalency	Admission Test Score Source Code Validation Form (STVTSRC)

Parameter Name	Required?	Description	Values
		<p>exists on SOATEQU. The default is <code>TAPE</code>. When running, the SARRATE process will use test scores with any of the data load sources identified in this parameter.</p> <p>Multiple values may be entered. Using multiple values allows the process to select the highest test score (having a defined source code) associated with a factor code defined in a formula.</p>	
Run Mode	Yes	Enter <code>A</code> for Audit mode to print a report without updating the database. Enter <code>U</code> for Update mode to update the database.	<p>A - Audit mode</p> <p>U - Update mode</p>
Report Type	Yes	Enter <code>S</code> to produce a control report that lists the number of records processed and a summary of the entered parameters. Enter <code>D</code> to produce a detailed report.	<p>S - Summary of records and parameters</p> <p>D - Detail of fields on report</p>

Electronic Application Report (SARETBL)

Updated: August 27, 2020

This report is used to view information about a student's electronic admissions application. The report is a companion to the Electronic Application Submitted Form (SAAETBL). There is no control page for this report.

This is an Oracle report. It is run through job submission on GJAPCTL.

Parameter Name	Required?	Description	Values
Application Source	No	<p>Enter the source of the admissions application such as EDI or WEB.</p> <p>While this parameter is not required, either the Application Source, Add Date, or Web ID parameter must be entered for the report to produce output.</p>	EDI Application Source Code Validation Form (STVAPLS)
Add Date	No	<p>Enter the date in DD-MON-YYYY format that the application was completed.</p> <p>While this parameter is not required, either the Application Source, Add Date, or Web ID parameter must be entered for the report to produce output.</p>	
Web ID	No	Enter the Web ID of	

Parameter Name	Required?	Description	Values
		<p>the student for which you want to see electronic application information.</p> <p>While this parameter is not required, either the Application Source, Add Date, or Web ID parameter must be entered for the report to produce output.</p>	
Destination Format	Yes	Use the list of values to select the format of the report output. The default format is PDF.	DELIMITED DELIMITED DATA HTML HTMLCSS POSTSCRIPT (This format is not currently supported.) PRINTER DESTINATION (This format is not currently supported.) RTF XML
Destination Type	Yes	Use the list of values to select CACHE, FILE, MAIL, or PRINTER, to indicate	CACHE - Display report on screen FILE - Save report to

Parameter Name	Required?	Description	Values
		<p>where the report output should be directed.</p> <p>You may use <code>CACHE</code> to display the output, and then you can print the report.</p> <p>The default is <code>CACHE</code>.</p>	<p>a file</p> <p>MAIL - Send report by email</p> <p>PRINTER - Print report</p>
Destination Name	No	<p>Enter the name of the destination where the output type selected above should be directed. The destination name can be 30 characters in length.</p>	
		<p>For example:</p> <p><code>FILE</code> - Enter a valid drive-folder-filename (such as <code>f:\share\myfile.pdf</code>). Due to the potentially sensitive nature of report output information, you should send output to a file where only the user has read access.</p> <p><code>MAIL</code> - Enter a valid email address (such as mailto:jdoe@aol.com). Enter multiple addresses with commas as separators.</p> <p><code>PRINTER</code> - Enter a valid printer name. If you selected <code>PRINTER</code> in the Destination Type parameter, and the value is left blank in the Destination Name parameter, the default</p>	

Parameter Name	Required?	Description	Values
		report server printer will be used.	
Execution Mode	Yes	<p>Enter the execution mode for the report as <code>RUNTIME</code> (from the form) or <code>BATCH</code> (from job submission).</p> <p>The default is <code>RUNTIME</code>.</p>	<p><code>RUNTIME</code> - Run from the form</p> <p><code>BATCH</code> - Run from job submission</p>
Communication Mode	Yes	<p>Enter the communication mode for synchronous (<code>SYNC</code>) or asynchronous (<code>ASYNC</code>).</p> <p>Synchronous specifies that control is returned to the calling form after the report has completed its processing.</p> <p>Asynchronous specifies that control is returned to the calling form immediately, even if the report has not completed its processing.</p> <p>The default is <code>SYNC</code>.</p>	<p><code>SYNC</code> - Wait on Banner form for report results</p> <p><code>ASYNC</code> - Run report behind the scenes</p>

Parameter Name	Required?	Description	Values
Parameter Form	Yes	Enter YES to display the Oracle Report Parameters Form or NO to not display the Oracle Report Parameters Form. The default is NO.	NO - Do not display Report Parameters Form YES - Display Report Parameters Form
Show Report Value Window	Yes	Enter YES to display the Report Value Window or NO to not display the Report Value Window. This parameter has no impact on job submission. The default is NO.	NO - Do not display Report Value Window YES - Display Report Value Window

Learner Curriculum Conversion Process (SOPLCCV)

Updated: August 27, 2020

This process is used to read the input population and run the curriculum conversion process. You must enter a valid ID or create a population selection to run this process.

The detailed output indicates the ID and name of each Banner Student person whose curriculum data has been converted, in addition to how many records within each module have been converted. In addition, the report indicates how many Banner Student IDs have been processed in total. The summary output displays the totals.

Parameter Name	Required?	Description	Values
Student Learner Module	No	Enter the student learner module code	Learner Module Validation Form

Parameter Name	Required?	Description	Values
		for the conversion process.	(STVLMOD)
Term	No	Enter the term code for which records are to be processed.	Term Code Validation Form (STVTERM)
Learner ID	No	<p>Enter the ID or IDs for the student(s) to be processed.</p> <p>Enter an ID number or enter % to select all SPRIDEN IDs where a recruiting, admissions, learner, or outcome record exists.</p> <p>If you enter a module code in the Student Learner Module parameter, the process will check for records only in that module.</p>	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract</p>	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the	

Parameter Name	Required?	Description	Values
		population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Rerun Conversion Indicator	Yes	Enter Y to delete and rebuild curriculum records, or enter N to leave the records as they are. The default is N.	Y - Delete and rebuild records N - Do not delete and rebuild records
Report Type	No	Enter D to produce a detailed report or S to produce a summary report. The default is S.	D - Detail report S - Summary report
Run Mode	Yes	Enter A to run in Audit mode or U to run in Update mode and update the database records. The default is A.	A - Audit mode U - Update mode

Learner Curriculum Purge Process (SOPLCPG)

Updated: August 27, 2020

This process is used to purge SORLCUR rows or SORLFOS rows or both for curriculum records from Recruiting, Admissions, General Student (Learner), and Academic History (Outcome).

This process calls the `sb_curriculum.p_delete` API which in turn calls the `sb_fieldofstudy.p_delete` API to delete all selected curriculum and fields of study

records. This process is run for an ID or a population selection, by term or learner module or both, and can be run in Update or Audit Mode.

Because users may not want to maintain inactive and non-current curriculum records on a student, they can use SOPLCPG to purge inactive and non-current student curricula. This process deletes an SORLCUR row and its associated SORLFOS row(s). Non-current curriculum rows are defined as rows that have a value of N in the **Current** field in the Curriculum or Field of Study blocks. The value that populates the field is located in the SOVLCUR_CURRENT_IND and SOVLFOS_CURRENT_IND view fields.

The SOPLCPG process ensures that if a curriculum record (SORLCUR) is removed, all related field of study rows (SORLFOS) are also removed. This process only purges curriculum rows that are non-current. Field of study rows are only purged in association with their respective curriculum record. Therefore, if a curriculum record is current and has an associated SORLFOS row that is non-current and inactive, the SORLFOS row will not be purged. Also, when a LEARNER curriculum record that is targeted to be purged is non-current for the processing term and is current in a different term, it will not be purged.

The process can be used to archive curriculum records to curriculum and field of study history tables (SORHCUR and SORHFOS). This provides historical data for reference, even after the records have been purged from the main curriculum and field of study tables.

The process checks if the curriculum record has an associated graduation application. The curriculum record will not be deleted if the graduation application exists, the module code for the record is LEARNER, and the record is not the only curriculum record that is attached to the graduation application.

Parameter Name	Required?	Description	Values
Learner Module	No	Enter the student learner module code for the conversion process. The valid values for this parameter are: <ul style="list-style-type: none"> • ADMISSIONS • RECRUIT • LEARNER 	Learner Module Validation Form (STVLMOD)

Parameter Name	Required?	Description	Values
		<ul style="list-style-type: none"> • OUTCOME <p>If this parameter is left blank, all curriculum (SORLCUR) and field of study (SORLFOS) records for these modules are examined for the population selection or individual IDs (SPRIDEN) or both.</p>	
Term	No	<p>Enter the term code for which records are to be processed.</p> <p>If this parameter is left blank, the report will use the highest SGBSTDN record for the Learner module to determine which curriculum record is current.</p>	Term Code Validation Form (STVTERM)
Learner ID	No	Enter the ID or IDs for the student(s) to be processed.	
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		<p>entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population	

Parameter Name	Required?	Description	Values
		selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Run Mode	Yes	Enter A to run in Audit mode or U to run in Update mode and update the database records. The default is A.	A - Audit mode U - Update mode
Report Type	Yes	Enter D to print a detail report or S to print a summary report. The default is D. The detail report lists each ID and the associated curriculum detail.	D - Detail report S - Summary report
Archive History	No	Enter Y to write all purged data to the curriculum and field of study history tables (SORHCUR and SORHFOS) for archiving or N to not archive the data. Y is the default.	Y - Archive N - Do not archive

Non-Destructive Curric Update Report (SORLCHG)

Updated: August 27, 2020

This report is used to show non-destructive updates made to curriculum or field of study records or both.

This report is run for an ID, all IDs, or a population selection, by term or learner module or both, by start and end dates, by curriculum status or curriculum activity status or both, and by searches on SORLCUR, SORLFOS or both.

A non-destructive update is used in the curriculum rows to maintain a history of all changes to a learner's curriculum, as no updates are allowed to existing curriculum and field of study records. The process used to update existing curriculum information is to duplicate the existing record, and then update the newly created record with the appropriate changes (i.e., to inactivate the record and indicate why it was inactivated). This report may be used to track changes made in curriculum, attempt to establish trends, and determine curriculum retention. The process selects SORLFOS rows independently of the associated SORLCUR rows.

Users are allowed to delete curriculum and field of study records. Deleted records are not considered non-destructive and will not be displayed on the report.

The system will determine if a record has a non-destructive update using the following criteria:

- If a row is non-current, the SOVLCUR_CURRENT_IND or the SOVLFOS_CURRENT_IND or both fields are set to N.
or
- If a row has a curriculum activity status of type INACTIVE (the SOBCACT_ACTIVE_IND is set to N).

A row can be inactive and still be current. Conversely, a row can be non-current and still be active.

The report sort order is based on the following criteria:

- Records are sorted by last name, first name, middle name, and Banner Student ID (in ascending order).
- Within each returned ID, the curriculum non-destructive updates are sorted by

module (Recruiting, Admissions, Learner, Outcome), term code (in descending order), key sequence number (in ascending order), and then by curriculum sequence number (in descending order).

- The SORLFOS rows are sorted by type (major first, minor second, concentration third, user-defined SORLFOS types fourth (in alpha ascending order)), priority (in ascending order), and sequence number (in descending order).

Parameter Name	Required?	Description	Values
Learner ID	No	Enter the ID or IDs for the student(s) to be processed, or enter % for all.	
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	Application Inquiry Form (GLIAPPL)
Selection Identifier	No	Enter the code that identifies the population with which you want to	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Learner Module	No	Enter the student learner module code for the conversion process.	Learner Module Validation Form (STVLMOD)
Term Code	No	Enter the term code	Term Code

Parameter Name	Required?	Description	Values
		<p>for which records are to be processed. You cannot enter multiple term codes.</p> <p>If this parameter is left blank, the report will use the highest SGBSTDN record for the Learner module to determine which curriculum record is current.</p> <p>This parameter retrieves records with non-destructive updates for that term. It does not retrieve non-current records from SORLCUR and SORLFOS that match the entered term code.</p>	Validation Form (STVTERM)
Start Date	No	Enter the earliest date for which non-destructive updates should be retrieved. If this parameter is left blank, all dates are included.	
End Date	No	Enter the latest date for which non-destructive updates	

Parameter Name	Required?	Description	Values
		should be retrieved. If this parameter is left blank, all dates are included	
CSTS Code	No	<p>Enter the curriculum status to be used in searching for non-destructive updates. This parameter only applies to field of study rows.</p> <p>This parameter should only be used with a Report Type parameter setting of F. The Report Type parameter setting of A displays curriculum and field of study non-destructive updates. The curriculum non-destructive updates are not selected based on the value in the CSTS Code parameter.</p>	Curriculum Status Validation Form (STVCSTS)
CACT Code	No	Enter the curriculum activity status to be used in searching for non-destructive updates.	Curriculum Activity Status Validation Form (STVCACT)
Report Type	Yes	Enter A to run the search against SORLCUR and SORLFOS, L to run	A - SORLCUR and SORLFOS

Parameter Name	Required?	Description	Values
		the search against SORLCUR only, or F to run the search against SORLFOS only. The default is A.	L - SORLCUR only F - SORLFOS only

Process Mass Entry Report (SORMEBP)

Updated: August 27, 2020

This report is used to execute the mass entry updates that have been held for job submission processing using the Results window of a mass entry form.

When updates are held for batch processing, records are written to the mass entry audit table (SORMAUD and SOBMAUD) without update results. A unique system generated batch ID is generated by the mass entry form to identify the job name for later processing.

This report processes the mass entry updates based on the mass entry form name, ID of the user who initiated the updates, the date and time the records were saved, the batch process ID, and whether completion dates exist. Output is listed in alphabetical order and can show summary, detail, or totals information.

This report can be run in Audit or Update Mode. When run in Audit Mode, the update results and associated result messages are not shown on the report output. When run in Update Mode, updates are made to the parent forms of the mass entry forms, and the SORMAUD table is updated with the ID of the user who ran the report, the date, the results (successful updates, failed updates, partial updates, no updates), and the setting of the **Process Indicator** on SOAMAUD.

This report is also used by Holds by Study Path at Registration to implement mass entry updates that have been held at the registration level. Registration Mass Entry (SFAMREG) page uses this process to hold students for job submission.

Below are examples of how partially updated, successfully updated and failure counts are impacted as a result of running job submission for Holds Study Path at Registration.

Example 1: When a single CRN associated to a study path on hold is chosen to drop.

In this example, if the number of students selected for update is 1, then the count of Successful update is 0, Partial update is 0, Number of no updates is 0 and Failed Update is 1.

Example 2: When a single CRN associated to a study path not on hold is chosen to drop.

In this example, if the number of students selected for update is 1, then the count of Successful update is 1, Partial update is 0, Number of no updates is 0 and Failed Update is 0.

Example 3: When all the CRNs are chosen to drop and an associated study path is on hold.

In this example, if the number of students selected for update is 1, then the count of Successful update is 0, Partial update is 1, Number of no updates is 0 and Failed Update is 0.

Example 4: When all CRNs associated to study paths not hold are chosen to drop.

In this example, if the number of students selected for update is 1, then the count of Successful update is 1, Partial update is 0, Number of no updates is 0 and Failed Update is 0.

Example 5: When all CRNs associated to study paths on hold are chosen to drop.

In this example, if the number of students selected for update is 1, then the count of Successful update is 0, Partial update is 0, Number of no updates is 0 and Failed Update is 1.

Note: The message in each processed report file is truncated but displayed completely in SFAMREG.

Parameter Name	Required?	Description	Values
Form Name	Yes	Enter the name of the mass entry form for which updates will be applied, or enter % for all.	SAAMAPP, SGAMSPT, SGAMSTU, SFAMREG, SHAMDEG, SHAMDIP, SHAMCAT,

Parameter Name	Required?	Description	Values
			SHAMUDI, SHAMUCA
Add User ID	No	Enter the Banner Student user ID associated with the initial mass entry audit table updates, or enter % for all.	
Add Date From	No	Enter the date from which records were initially added to the mass entry audit tables. If left blank, the date defaults to the beginning of time.	
Add Date To	No	Enter the date to which records were initially added to the mass entry audit tables. If left blank, the date defaults to the end of time.	
Batch Process ID	No	Enter the system generated batch identifier from SOAMAUD for the job submission process.	
Report Option	Yes	Enter D to show all student details, or S to show only control totals. The default is D.	D - Detailed report S - Totals only
Run Mode	Yes	Enter A to run the report in Audit mode	A - Audit mode

Parameter Name	Required?	Description	Values
		or U to run the report in Update mode and update the database. The default is A.	U - Update mode

Purge Mass Entry Audit Process (SOPMAUD)

Updated: August 27, 2020

This process is used to purge mass entry audit information that is displayed in SOA MAUD. This helps keep the SORMAUD and SOBMAUD table sizes from getting too large.

Records can be selected for deletion based on mass entry form, user ID, from and to dates, and update status/delete option.

The update status can be:

- complete updates
- failed updates
- incomplete updates (no completion date)
- not selected for updates
- partial updates
- successful updates

The process can be run in Audit or Update Mode and can show summary, detail, or totals information.

Parameter Name	Required?	Description	Values
Form Name	Yes	Enter the name of the mass entry form for which records are to be purged, or enter % for all.	SAAMAPP, SGAMSPT, SGAMSTU, SFAMREG, SHAMDEG,

Parameter Name	Required?	Description	Values
			SHAMDIP, SHAMCAT, SHAMUDI, SHAMUCA
User ID	No	Enter the Banner Student user ID associated with the mass entry audit table updates, or enter % for all.	
Add Date From	No	Enter the date from which records are to be purged from the mass entry audit tables. If left blank, the date defaults to the beginning of time.	
Add Date To	No	Enter the date to which records are to be purged from the mass entry audit tables. If left blank, the date defaults to the end of time.	
Delete Option	Yes	Enter the update status for records to be purged from SORMAUD. Enter: <ul style="list-style-type: none"> • A for all updates complete (completion date exists) • F for failed updates 	A - Updates completed F - Failed updates I - Incomplete updates N - Not updated P - Partially updated Y - Successfully

Parameter Name	Required?	Description	Values
		<ul style="list-style-type: none"> • I for incomplete updates (no completion date) • N for not updated • P for partially updated • Y for successfully updated <p>The default is A. Records with an update status of the following will not be deleted unless they have completion dates:</p> <ul style="list-style-type: none"> • A • F • N • P • Y <p>Records with an update status of I will be deleted without having completion dates.</p>	updated
Run Mode	Yes	Enter:	A - Audit mode

Parameter Name	Required?	Description	Values
		<ul style="list-style-type: none"> • A to run the report in Audit mode • U to run the report in Update mode and update the database. <p>The default is A.</p>	U - Update mode
Report Option	Yes	<p>Enter:</p> <ul style="list-style-type: none"> • A to show form summary information from SOAMAUD • D to show all student details • S to show only control totals <p>The default is A.</p> <p>Totals include the number of persons in the mass entry selection and the number of records to be deleted.</p>	<p>A - Summary information</p> <p>D - Student details</p> <p>S - Totals only</p>
Batch Process ID	No	Enter the system generated batch identifier for the job submission process.	

General Student

Updated: August 27, 2020

Advisors Assignment Process (SGPADVA)

Updated: March 20, 2025

Use the Advisors Assignment Process (SGPADVA) to assign, replace, end or delete advisors to a student, or a group of students on the Multiple Advisors (SGAADVR) page.

The process performs the following functions:

- Filters the list of students to be assigned, replaced, ended or deleted with advisors based on the population selection parameters or other parameters like Program, Degree, Level, Cohort and so on.
- Assigns the advisors to a student based on the matching active rules defined on the Advisors Assignment Rules (SGAAVRL) page for a specific term.
- Inserts the advisors as a primary or non-primary advisors to the students for a specific term.
- Replaces the existing advisor for a student with a new advisor and advisor type using the job parameters values for a population of students.
- Ability to End all advisors or a specific advisor for a student to a specific term.
- Ability to Delete all advisors or a specific advisor for a student to a specific term.
- Ability to End or Delete all or a specific advisor for a student based on Advisor Type.
- Ability to Copy or End the existing advisor assignments from the effective term.

When the Job process is run, the advisor selected for each of the matched active rules from the SGAAVRL rules page will be inserted into the Multiple Advisors (SGAADVR) page for the **Update Term** parameter specified on the job parameter.

Note:

- You can run the process either with the parameters from 7 to 18 or with the population selection parameters.

- You can leave the parameters from 7 to 18 blank only if the population selection parameters are defined.
- If both population selection parameters and other parameters like Program, Degree, Level, Cohort, and so on are defined, when the job process is run, then the population selection parameters take precedence and the list of students to be assigned or replaced with advisors are filtered based on the population selection.

Parameter Name	Required?	Description	Values
Effective Term	Yes	Enter the term code used to fetch list of students whose curriculum records falls within this term or immediate previous max term.	Term Code Validation Form (STVTERM)
Update Term	Yes	Enter the term code for which advisors are assigned, replaced, ended or deleted on the Multiple Advisors (SGAADVR) page.	Term Code Validation Form (STVTERM)
Action	Yes	Select: <ul style="list-style-type: none"> • A – to assign the advisors to the students. • R – to replace the advisors from the students. • E – to end advisors to the students. • D – to delete advisors to the 	

Parameter Name	Required?	Description	Values
		students.	
Advisor ID	No	Enter the new Advisor ID that will replace for student on the Multiple Advisors (SGAADVR) page. This field is required only if the Action parameter is set to R.	Faculty/Advisor Filter (SIAIQRY)
Advisor Type	No	Enter the Advisor Type Code for an Advisor. Used when the action parameter is: <ul style="list-style-type: none"> • R - Replace • E - End • D - Delete 	Advisor Type Validation (STVADVR)
Existing Advisor ID	No	Existing Advisor ID used to <ul style="list-style-type: none"> • (R)eplace • (E)nd • (D)elele the existing advisors.	Faculty/Advisor Filter (SIAIQRY)
Program	No	Enter the program code of the curriculum.	Program Definitions Rules (SMAPRLE)
Level	No	Enter the student level code of the	Level Code Validation (STVLEVL)

Parameter Name	Required?	Description	Values
		curriculum.	
College	No	Enter the college code of the curriculum.	College Code Validation (STVCOLL)
Campus	No	Enter the campus code of the curriculum.	Campus Code Validation (STVCAMP)
Degree	No	Enter the degree code of the curriculum.	Degree Code Validation (STVDEGC)
Class	No	Enter the class code of the primary curriculum.	Class Code Validation (STVCLAS)
Cohort	No	Enter the cohort code of the student.	Cohort Code Validation (STVCHRT)
Student Attribute	No	Enter the student attribute.	Student Attribute Validation (STVATTS)
Sport	No	Enter the Sport Code defined for the student on the Athletic Compliance (SGASPRT) page.	Banner Student Activity Code Validation (STVACTC)
Field of Study Type	No	Enter the field of study type for the curriculum.	Learner Field of Study Type Validation (GTVLFST)
Field of Study Code	No	Enter the field of study code for the curriculum.	Major, Minor, Concentration Validation Table (STVMAJR)
Department	No	Enter the department code linked to a field of study code.	Department Code Validation (STVDEPT)

Parameter Name	Required?	Description	Values
Run Mode	Yes	<ul style="list-style-type: none"> • Enter A to run the process in audit mode. • Enter U to run the process in the update mode to assign an advisor for a student. 	<ul style="list-style-type: none"> • A - Audit mode • U - Update mode
Application	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) can be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Selection ID	No	Enter the code that identifies the population with which you want to work. The selection	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Manage Existing Advisors	No	Enter <ul style="list-style-type: none"> • C - Copy Existing Advisors. • E - End existing advisors before 	<ul style="list-style-type: none"> • C - Copy existing advisors (if any) • E - End existing advisors (if any)

Parameter Name	Required?	Description	Values
		assigning. The values are required if the Parameter 03 = (A)ssign.	

Job process logic for Action parameter

Updated: November 14, 2024

The logical process of the job when the Action parameter is Assign, Replace, End or Delete.

Job process logic when the Action parameter is Assign

Select the **Action** parameter as A-Assign, and ensure to maintain active rules on the SGAAVRL page. Based on the population selection parameters, or other parameters like Program, Degree, Level, Cohort, and so on, provided when the job is run, the students Active and Current curriculum records are filtered for the term defined in the **Effective Term** parameter. Each of the filtered students records are then matched with the active rules on the SGAAVRL page for the exact term or its previous term defined in the **Update Term** parameter.

- If multiple rules match for a student, then all the advisors from all the matched rules must be assigned to the students for the term defined on the **Update Term** parameter.
- If a primary advisor is available for a student for the term defined on the **Update Term** parameter, then insert the advisors as a non-primary advisor to the students for the term defined on the **Update Term** parameter.
- If there are no advisors assigned for a student for the term defined on the **Update Term** parameter, then the matched least rule number's primary advisor is assigned as the primary advisor to a student, and the rest of the matched rules advisors are assigned as non-primary advisors.

For example, consider the rules are defined on the SGAAVRL page as mentioned in the below table and a student is on curriculum for Program = BA-MATH, Level = UG and Term = 202310.

- In this case the student curriculum records matches with Rule 1 and Rule 2.
- Considering the Rule Number, the Rule 1 is prioritized and Kelly Leahey (G00376009), is assigned as the primary advisor to the student for the term = 202310 on the Multiple Advisor (SGAADVR) page.
- Considering the Rule Number, Robert Frost (G00578242) is defined as primary advisor for the Rule 2; however, as there can be only one primary advisor for a term, the advisor Robert Frost (G00578242) will be assigned as a non-primary advisor to the student for the term = 202310.

Active	Rule Number	Term Code	Program	Level	Advisor ID	Advisor Name	Advisor Type	Primary Advisor
Y	1	202310		UG	G00376009	Kelly Leahey	DEAN	Y
Y	1	202310		UG	G00365056	Jonathan Henry	PRDR	N
Y	2	202310	BA-MATH		G00578242	Robert Frost	PRDR	Y
Y	2	202310	BA-MATH		G00855200	David Bell	PRDR	N

If a rule is set just by passing the **Starting Last Name** as A and NO Ending Last Name, you can assign the advisor for the student whose last name starts with A till Z. If a rule is set just by passing the Ending Last Name as M, you can assign the advisor for the student whose last name starts with A till M.

If a rule is set by passing **Starting Last Name** as A and **Ending Last Name** as M, you can assign the advisor for the student whose last name starts with A till M.

Note: In this case the Ending Last Name as M should exactly match with student's Last Name value and any student's Last Name with more than two characters like Md. Hassan, Morgan, Morris, and so on is treated as greater than Ending Last Name as M and will not be assigned advisors based on this rule. Therefore Ellucian recommends to setup a rule like **Starting Last Name** as A and **Ending Last Name** as MZ so that the names such

as Md. Hassan, Morgan, Morris, and so on can also be considered.

- The **Starting Last Name** and **Ending Last Name** defined on SGAAVRL page for a rule is considered as a range of alphabets when evaluated in job process. For example:

Table 1: List of Students

ID	Last Name	First Name
A0001	Aalder	John
A0002	Adison	Sam
A0003	Brooks	Dan
A0004	Md. Hassan	Ben
A0005	Morgan	Steve

Table 2: SGAAVRL Rules

Active	Rule Number	Effective Term	Starting Last Name	Ending Last Name	SGPADVA Expected result
Y	1	202410	AB	MD	A0002, A0003, A0004
Y	2	202410	AB		A0002, A0003, A0004, A0005
Y	3	202410		MD	A0001, A0002, A0003, A0004
Y	4	202410	A	M	A0001, A0002, A0003

- In the SGAAVRL Rules table, the Rule Number 1 has a range from AB to MD and therefore all the students with Last Name beginning from AB till MD must be considered to assign an advisor. The Student ID A0001 whose Last Name begins with AA will not be considered for this rule.
- The Rule Number 2 has a range from AB, and there is no **Ending Last Name**,

therefore all the students whose Last Name begins from **AB** and above till **ZZ** must be considered to assign an advisor. The Student ID **A0001** whose Last Name begins from **AA** will not be considered for this rule.

- The Rule Number 3 has a range defined for **Ending Last Name** = **MD**, and there is no **Starting Last Name** defined, therefore all the students whose Last Name ends till **MD** and below, that is. **AA** must be considered to assign an advisor. The Student ID **A0005** whose Last Name begins from **MO** will not be considered for this rule.
- The Rule Number 4 has a range from **A** to **M** and therefore all the students with Last Name beginning from **A** till **M** should be considered to assign an advisor. Note that even though the Student ID's **A0004** and **A0005** whose Last Name begins with **M** those students will not be considered for this rule because the **Ending Last Name** is set with single character **M** for the rule but the Student IDs **A0004** and **A0005** has Last Name with more than one characters and therefore treated as greater than **Ending Last Name** = **M**. If you want to consider the Student IDs **A0004** and **A0005** within this rule then its recommended to set the rule as **Starting Last Name** = **A** and **Ending Last Name** = **MZ**.

Note: When the process is run with the **Action** parameter as **A-Assign** the job process will not remove any existing or manually added advisors for the term from the student record on the SGAADVR page. The advisors can be replaced for student(s) by setting the Action = **(R)replace** parameter and defining values on the Advisor ID, Advisor Type and Existing Advisor ID parameters.

Job process logic when the Action parameter is Replace

Select the **Action** parameter as **R-Replace**, to replace an existing advisor for a student. The students list is filtered based on the population selection parameters or other parameters like Program, Degree, Level, Cohort and so on, provided when the job is run. The students Active and Current curriculum records are filtered for the term defined in the **Effective Term** parameter.

For a list of students whose term is defined in the **Update Term** parameter and its immediate previous maximum term, the process checks if there is an Advisor ID available as defined in the **Existing Advisor ID** parameter.

- If there is an existing advisor, the advisor is replaced with the advisor from the

Advisor ID parameter, and the advisor type is replaced with the advisor type in the **Advisor Type** parameter for the student.

- If there are no existing advisors, the replacement is not processed for the student.

The replacement happens regardless of the existing advisor is primary advisor or non-primary advisor on the SGAADVVR page for the term defined on the **Update Term** parameter, or its immediate previous maximum term.

- If the existing advisor is primary advisor, then the Advisor ID and Advisor Type defined on the **Advisor ID** parameter and **Advisor Type** parameter will be added as primary advisor for a student.
- If the existing advisor is non-primary advisor, then the Advisor ID and Advisor Type defined on **Advisor ID** parameter and **Advisor Type** parameter will be added as non-primary advisor for a student.

Note:

- When the process is run with the **Action** parameter as R-Replace the job process will NOT check for active rules defined on the Advisors Assignment Rules (SGAAVRL) page for a specific term. The replace of advisors to a student would be dependent only on the values defined on **Advisor ID**, **Advisor Type** and **Existing Advisor ID** parameters.
- If the advisor defined on **Existing Advisor ID** parameter has multiple records for student with different "Advisor Type" on SGAADVVR page then all the records for the advisor will be replaced with the advisors defined on **Advisor ID** parameter and **Advisor Type** parameter.

Job process logic when the Action parameter is End

Select the **Action** parameter as E-End, to end a single advisor, or all the advisors assigned to a student for a specific term,

- If the **Existing Advisor ID** parameter is left blank when **Action** = E, then it is considered as end all advisors for a term.
- If the **Existing Advisor ID** parameter is not blank when **Action** = E, then it is considered as end specific advisor for a term.

The **Update Term** parameter identifies the term for which you want to end the advisors.

The SGPADVA process picks the list of students based on the population selection.

Example scenario to end all advisors

- Effective Term = 202410
- Update Term = 202420
- Action = E
- Existing Advisor ID = NULL

Existing data on the SGAADVR page:

Advisor	From Term	End Term	Primary
ADV01	202410	999999	
ADV02	202410	999999	Y
ADV03	202410	999999	

SGAADVR page after ending all advisors:

Advisor	From Term	End Term	Primary	Comments
ADV01	202410	202420		
ADV02	202410	202420	Y	
ADV03	202410	202420		
NULL	202420	999999		This record will not be visible on the page.

Example scenario to end single advisor:

- Effective Term = 202410
- Update Term = 202420
- Action = E
- Existing Advisor ID = ADV03

Existing data on the SGAADVR page:

Advisor	From Term	End Term	Primary
ADV01	202410	999999	
ADV01	202410	999999	Y
ADV01	202410	999999	

SGAADVR page after ending single advisor:

Advisor	From Term	End Term	Primary
ADV01	202410	202420	
ADV02	202410	202420	Y
ADV03	202410	202420	
ADV01	202410	999999	
ADV02	202410	999999	Y

Job process logic when the Action parameter is Delete

Select the **Action** parameter as **D**, to delete a single advisor, or all the advisors assigned to a student for a specific term,

- If the **Existing Advisor ID** parameter is left blank when **Action** = **D**, then it considered as delete all advisors for a term.
- If the **Existing Advisor ID** parameter is not blank when **Action** = **D**, then it considered as delete specific advisor for a term.

The **Update Term** parameter identifies the term for which you want to delete the advisors. The SGPADVA process picks the list of students based on the population selection.

Job process logic for Advisor Type parameter

Updated: November 14, 2024

You can delete or end a single advisor or all advisors for a specific advisor type.

Job process logic to delete All advisors for a specific Advisor Type

The institutions can delete all the advisors assigned to a student for a Update Term based on the **Advisor Type** parameter.

- If the **Existing Advisor ID** is left blank and **Advisor Type** is not blank when the **Action = D**, then it is considered as Delete all Advisors specific to a **Advisor Type** for a term.
- The existing **Update Term** parameter identifies to which term the advisors should be deleted.

To delete advisors for a specific **Advisor Type**, run the job process with **Action = D**, **Update Term = 202420**, **Existing Advisor ID = Blank** and **Advisor Type = Not Blank**, then:

- The process checks if the **Advisor Type** defined in the job process parameter exists for the exact **Update Term** on the SGAADVR page for a student.
 - If it is not defined, an error message displays in .lis file against the student record.
 - If it is defined, then:
 - The process checks if the Advisor with the specific **Advisor Type** is a Primary Advisor and the only advisor assigned for the student.
If yes, then delete the advisor on the exact term as **Update Term** for the student.
 - The process checks if the Advisor with the specific **Advisor Type** is a Primary Advisor and not the only advisor assigned for the student for the Update Term.
If yes, then an error message displays in .lis file against the student record.
 - If the Advisor with the specific **Advisor Type** defined is not a Primary Advisor then, delete the advisor on the exact term as Update Term for the student.

Job process logic to delete a single advisor for a specific Advisor Type

The institutions can delete a single advisor assigned to a student for a Update Term based on the **Advisor Type** parameter.

- If the **Existing Advisor ID** and **Advisor Type** is not blank when the **Action = D**, then it

is considered as Delete a specific Advisor specific to a **Advisor Type** for a term.

- The existing **Update Term** parameter identifies to which term the advisors should be deleted.

To delete advisors for a specific **Advisor Type**, run the job process with **Action** = D, **Update Term** = 202420, **Existing Advisor ID** = Not Blank and **Advisor Type** = Not Blank, then:

- The process checks if the specific **Existing Advisor ID** and **Advisor Type** defined in the job process parameter exists for the exact **Update Term** on the SGAADVR page for a student.
 - If it is not defined, an error message displays in the .lis file against the student record.
 - If it is defined, then:
 - Process checks if the specific **Existing Advisor ID** and the specific **Advisor Type** defined in job process parameter is a Primary Advisor and the only advisor assigned for the student for the **Update Term**. If yes, then delete the advisor on the exact term as **Update Term** for the student.
 - Next, process checks if the specific **Existing Advisor ID** and the specific **Advisor Type** defined in job process parameter is a Primary Advisor and not the only advisor assigned for the student for the **Update Term**. If yes, then an error message displays in the .lis file against the student record.
 - If the specific **Existing Advisor ID** and the specific **Advisor Type** defined in job process parameter is not a Primary Advisor then, delete the advisor on the exact term as **Update Term** for the student.

Job process logic to end all advisors for a specific Advisor Type

The institutions can end all the advisors assigned to a student for a **Update Term** based on the **Advisor Type** parameter.

- If the **Existing Advisor ID** is blank and **Advisor Type** is not blank when the **Action** = E, then it is considered as End Advisors specific to a **Advisor Type** for a term.

- The existing **Update Term** parameter identifies to which term the advisors should be ended.

To end advisors for a specific **Advisor Type**, run the job process with **Action** = E, **Update Term** = 202420, **Existing Advisor ID** = Blank and **Advisor Type** = Not Blank, then:

- The process checks if the **Advisor Type** defined in the job parameter exists for the immediate previous max term of **Update Term** on the SGAADVR page.
 - If it is not defined, an error message displays in the .lis file against the student record.
 - If it is defined, then:
 - The process checks if the Advisor defined in the job parameter is a Primary Advisor and the only advisor for the student.
 - If it is defined, then:
 - End the advisor for the immediate previous max term record to the term defined on **Update Term**, that is, on SGAADVR the End Term for the immediate previous max term should be equal to **Update Term** value.
 - Create a new row on the SGRADVR table for the **Update Term** with a NULL Advisor ID and **Advisor Type**.
 - If it is not defined, then an error message displays in the .lis file against the student record.
 - If none of the advisors is a Primary Advisor with the **Advisor Type** defined in the job parameter then:
 - End the advisors with the **Advisor Type** defined in the job parameter for the immediate previous max term record to the term defined on **Update Term**, that is, on the SGAADVR the End Term for the immediate previous max term should be equal to Update Term value.
 - Create a new record for the Term = **Update Term** and insert the remaining advisors.
 - If same advisor has multiple records with different **Advisor Type** and one record is Primary and the other is Non-primary, and is the only advisor for the student then:

- The process checks if the the advisor record with **Advisor Type** defined in the job parameter is a Primary advisor.
 - If it is defined, then an error message displays in the .lis file against the student record.
 - If it is not defined, then:
 - End the advisor record with the **Advisor Type** defined in the job parameter for the immediate previous max term record to the term defined on **Update Term**, that is, on the SGAADVR the End Term for the immediate previous max term should be equal to Update Term value.
 - Create a new record for the Term = **Update Term** and insert the remaining advisor record.

Job process logic to end a single advisor for a specific Advisor Type

The institutions can end a single advisor assigned to a student for a Update Term based on the **Advisor Type** parameter.

- If the **Existing Advisor ID** and **Advisor Type** is not blank when the **Action** = E, then it is considered as End a specific **Advisor ID** with a specific **Advisor Type** for a term.
- The existing **Update Term** parameter identifies to which term the advisors should be ended.

To end a specific Advisor ID for a specific **Advisor Type**, run the job process with **Action** = E, **Update Term** = 202420, **Existing Advisor ID** = Not Blank and **Advisor Type** = Not Blank, then:

- The process checks if the specific **Existing Advisor ID** and **Advisor Type** defined in job process parameter exists for the exact **Update Term** on the SGAADVR page.
 - If it is not defined, an error message displays in the .lis file against the student record.
 - If it is defined, then:
 - The process checks if the **Existing Advisor ID** with the **Advisor Type** defined in the job parameter is a Primary Advisor and the only advisor

for the student.

- If it is defined, then:
 - End the advisor for the immediate previous max term record to the term defined on **Update Term**, that is, on SGAADV the End Term for the immediate previous max term should be equal to **Update Term** value.
 - Create a new row on the SGRADV table for the **Update Term** with a NULL Advisor ID and Advisor Type.
- If it is not defined, then an error message displays in the .lis file against the student record.
- If the **Existing Advisor ID** with the **Advisor Type** defined in the job parameter is not a Primary Advisor then:
 - End the **Existing Advisor ID** with the **Advisor Type** defined in the job parameter for the immediate previous max term record to the term defined on the **Update Term**, that is, on the SGAADV the End Term for the immediate previous max term should be equal to the **Update Term** value.
 - Create a new record for the Term = Update Term and insert the remaining advisors.
- If the **Existing Advisor ID** has multiple records with different **Advisor Type**, that is, one record is Primary and the other is Non-primary, and is only advisor for the student then:
 - If it is defined, then, an error message displays in the .lis file against the student record.
 - If it is not defined, then:
 - End the **Existing Advisor ID** with the **Advisor Type** defined in the job parameter for the immediate previous max term record to the term defined on **Update Term**, that is, on the SGAADV the End Term for the immediate previous max term should be equal to **Update Term** value.
 - Create a new record for the Term = Update Term and insert the remaining advisor record.

Example Scenarios

Existing Data on the SGAADVR page for a student.

Advisor	Advisor Type	Primary
ADV01	T1	Y
ADV01	T2	
ADV03	T2	
ADV04	T1	
ADV05	T3	

Scenario: Delete/End All Advisors with only Advisor Type = T1

Result: In the above table Advisor ID's, that is ADV01 and ADV04 has Advisor Type = T1. As Advisor ID = ADV01 is a primary advisor it will not be deleted/ended for the student, and an error message displays in the job process against the student record.

Scenario: Delete/End All Advisors with only Advisor Type = T2

Result: In the above table Advisor ID's, that is, ADV01 and ADV03 has Advisor Type = T2 and is not primary advisors. Therefore; the advisor will be deleted/ended for the student.

Scenario: Delete/End specific Advisor ID with specific Advisor Type, that is, Advisor ID = ADV01 and Advisor Type = T1

Result: In the above table Advisor ID = ADV01 with Advisor Type T1 exists but is a primary advisor. Therefore; it will not be deleted/ended for the student, and an error message displays in the job process against the student record.

Scenario: Delete/End specific Advisor ID with specific Advisor Type, that is, Advisor ID = ADV04 and Advisor Type = T1

Result: In the above table Advisor ID = ADV04 with Advisor Type T1 exists and it is not a primary advisor. Therefore; the advisor will be deleted/ended for the student.

Job process logic for Manage Existing Advisors parameter

Updated: November 14, 2024

When executing the process with Parameter 03 set to Action = A, you have the option to either copy or end the current advisor assignments for the term specified in Parameter 02 - Update Term.

Job process logic if Action = A and Manage Existing Advisors = C

1. The **Maintenance** button must be enabled on the SGAADVR page.
2. The job process replicates the features of Copy Advisors within the **Maintenance** button.
3. Copy all the existing Advisors that have an effective term less than the maximum term defined in Parameter 02 - Update Term.
4. Add the copied advisors to the term defined in Parameter 02 - Update Term.
 - a. The Primary Advisors from the last term are assigned as primary advisors for the term indicated in Parameter 02 - Update Term.
 - b. The Non-Primary Advisors from the last term are added as non-primary advisors for the term indicated in Parameter 02 - Update Term.

When the advisors are copied, the job process assigns the additional advisors based on the SGAAVRL matched rules, if any exists.

Note: Be sure to have at least one active rule available on the SGAAVRL page to assign advisors for the students.

Example:

Copy Existing Advisor when Action = (A)ssign.

Scenario 1:

Data is not available on the SGAADVR page for the Parameter 02 - Update Term = 202520.

Existing student data on the SGAADVR page.

Advisor ID	Advisor Type	From Term	To Term	Primary Indicator
ADV01	PRIM	202510	999999	N
ADV02	MAJR	202510	999999	Y
ADV03	MINR	202510	999999	N

Data setup on the Advisors Assignment Rules (SGAAVRL) page.

Note: The table below presents only a few selected columns from the SGAAVRL page to

illustrate the scenario. Use the additional columns from the page to establish the rules.

Active	Rule Number	Effective Term Code	Advisor ID	Advisor Name	Advisor Type	Primary Advisor
Y	1	202510	G00376009	Kelly Leahey	DEAN	Y
Y	1	202510	G00365056	Jonathan Henry	PRDR	N

- Parameter 01: Effective Term = 202510
- Parameter 02: Update Term = 202520
- Parameter 03: Action = A
- Parameter 24: Manage Existing Advisors = C

The table below illustrates the SGAADVRL page after applying the Copying Existing Advisor's logic for students associated with Rule Number = 1 on the SGAAVRL page.

Advisor ID	Advisor Type	From Term	To Term	Primary Indicator
ADV01	PRIM	202510	202520	N
ADV02	MAJR	202510	202520	Y
ADV03	MINR	202510	202520	N
ADV01	PRIM	202520	999999	N
ADV02	MAJR	202520	999999	Y
ADV03	MINR	202520	999999	N
G00376009	DEAN	202520	999999	N Note: Although designated as the primary advisor on the SGAAVRL page, this advisor is actually classified as a non-primary advisor.
G00365056	PRDR	202520	999999	N

Scenario 2:

Data is available on the SGAADVVR page for the Parameter 02 - Update Term = 202520.

Existing student data on the SGAADVVR page.

Advisor ID	Advisor Type	From Term	To Term	Primary Indicator
G00370000	PRIM	202520	999999	N
G00370001	MAJR	202520	999999	Y
G00370002	MINR	202520	999999	N

Data setup on the Advisors Assignment Rules (SGAAVRL) page.

Note: The table below presents only a few selected columns from the SGAAVRL page to illustrate the scenario. Use the additional columns from the page to establish the rules.

Active	Rule Number	Effective Term Code	Advisor ID	Advisor Name	Advisor Type	Primary Advisor
Y	1	202510	G00376009	Kelly Leahey	DEAN	Y
Y	1	202510	G00365056	Jonathan Henry	PRDR	N

- Parameter 01: Effective Term = 202510
- Parameter 02: Update Term = 202520
- Parameter 03: Action = A
- Parameter 24: Manage Existing Advisors = C

The table below illustrates the SGAADVVR page after applying the Copy Existing Advisor's logic for students associated with Rule Number = 1 on the SGAAVRL page.

Advis or ID	Advisor Type	From Term	To Term	Primary Indicator
G0037 0000	PRIM	202520	999999	N
G0037 0001	MAJR	202520	999999	Y
G0037 0002	MINR	202520	999999	N
G0037 6009	DEAN	202520	999999	N Note: Although designated as the primary advisor on the SGAAVRL page, this advisor is actually classified as a non-primary advisor.
G0036 5056	PRDR	202520	999999	N

Job process logic if Action = A and Manage Existing Advisors = E

1. The **Multiple Advisors (SGAADVR)** page must not contain any records for Parameter 02 - Update Term.
2. The **Maintenance** button must be enabled on the SGAADVR page.
3. The job process replicates the features of End Advisors within the **Maintenance** button.
4. End all the existing Advisors for the term defined in Parameter 02 - Update Term.

Assign advisors to students for the term defined in Parameter 02 - Update Term based on the SGAAVRL matched rules.

Example:

End Existing Advisor when Action = (A)ssign.

Scenario 1:

Data is not available on the SGAADVR page for the Parameter 02 - Update Term = 202520.

Existing student data on the SGAADVR page.

Advisor ID	Advisor Type	From Term	To Term	Primary Indicator
ADV01	PRIM	202510	999999	N
ADV02	MAJR	202510	999999	Y
ADV03	MINR	202510	999999	N

Data setup on the Advisors Assignment Rules (SGAAVRL) page.

Note: The table below presents only a few selected columns from the SGAAVRL page to illustrate the scenario. Use the additional columns from the page to establish the rules.

Active	Rule Number	Effective Term Code	Advisor ID	Advisor Name	Advisor Type	Primary Advisor
Y	1	202510	G00376009	Kelly Leahey	DEAN	Y
Y	1	202510	G00365056	Jonathan Henry	PRDR	N

- Parameter 01: Effective Term = 202510
- Parameter 02: Update Term = 202520
- Parameter 03: Action = A
- Parameter 24: Manage Existing Advisors = E

The table below illustrates the SGAADVR page after applying the End Existing Advisor's logic for students associated with Rule Number = 1 on the SGAAVRL page.

Advisor ID	Advisor Type	From Term	To Term	Primary Indicator
ADV01	PRIM	202510	202520	N
ADV02	MAJR	202510	202520	Y
ADV03	MINR	202510	202520	N

Advisor ID	Advisor Type	From Term	To Term	Primary Indicator
G00376009	DEAN	202520	999999	Y
G00365056	PRDR	202520	999999	N

Scenario 2:

Data is available on the SGAADVR page for the Parameter 02 - Update Term = 202520.

Existing student data on the SGAADVR page.

Advisor ID	Advisor Type	From Term	To Term	Primary Indicator
G00370000	PRIM	202520	999999	N
G00370001	MAJR	202520	999999	Y
G00370002	MINR	202520	999999	N

Data setup on the Advisors Assignment Rules (SGAAVRL) page.

Note: The table below presents only a few selected columns from the SGAAVRL page to illustrate the scenario. Use the additional columns from the page to establish the rules.

Active	Rule Number	Effective Term Code	Advisor ID	Advisor Name	Advisor Type	Primary Advisor
Y	1	202510	G00376009	Kelly Leahey	DEAN	Y
Y	1	202510	G00365056	Jonathan Henry	PRDR	N

- Parameter 01: Effective Term = 202510
- Parameter 02: Update Term = 202520
- Parameter 03: Action = A

- Parameter 24: Manage Existing Advisors = E

The table below illustrates the SGAADVRL page after applying the End Existing Advisor's logic for students associated with Rule Number = 1 on the SGAADVRL page.

Advisor ID	Advisor Type	From Term	To Term	Primary Indicator
G00370000	PRIM	202520	999999	N
G00370001	MAJR	202520	999999	Y
G00370002	MINR	202520	999999	N
G00376009	DEAN	202520	999999	N Note: Although designated as the primary advisor on the SGAADVRL page, this advisor is actually classified as a non-primary advisor.
G00365056	PRDR	202520	999999	N

Student Block Load Process (SGPBLCK)

Updated: August 27, 2020

This process associates a group of students defined through population selection to a block code for an effective term. The block code on the General Student Form (SGASTDN) is not updated when the process is run in Update mode.

Parameter Name	Required?	Description	Values
Selection Identifier	No	Enter the code that identifies the population with	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the	

Parameter Name	Required?	Description	Values
		population selection parameters must be entered.	
Report Term	Yes	Enter the code representing the term for which the report is to be run. This is the term that will be used in headers and student selection.	Term Code Validation Form (STVTERM)
Effective Term	Yes	Enter the effective term of the general student record to be updated with a block code.	Term Code Validation Form (STVTERM)
Block Schedule Code	Yes	Enter the block schedule code to be posted to the selected student records.	Block Code Validation Form (STVBLCK)

Cooperative Education Purge (SGPCOOP)

Updated: August 27, 2020

This process is used to purge all the cooperative education data for all students.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term code representing the term for which you want to delete all the cooperative education data.	Term Code Validation Form (STVTERM)
Process Option	Yes	Enter 1 to purge all	1 - Purge records

Parameter Name	Required?	Description	Values
		records with effective term less than or equal to the specified term; enter 2 to purge all records with an activity date less than or equal to the specified date.	with effective term less than or equal to specified term 2 - Purge records with activity date less than or equal to specified date
Effective Term	No	Enter the term code representing the term before which you want to delete all the cooperative education data.	Term Code Validation Form (STVTERM)
Activity Date	No	Enter the date before which you want to purge all the information (use date format DD-MON-YYYY).	
Run Mode	Yes	Enter A to run the report without updating the database (Audit mode); enter U to update the database after running the purge process (Update mode).	A - Audit mode U - Update mode

Hold Purge (SGPHOLD)

Updated: August 27, 2020

This process will purge all expired holds based on the user-specified parameters of expiration date, activity date, and hold type. You can purge holds by expiration date or by

hold activity date.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term code associated with the process.	Term Code Validation Form (STVTERM)
Purge Option	Yes	Choose a purge option. Enter 1 to purge holds by expiration date, or enter 2 to purge holds by hold activity date.	1 - Purge records by expiration date 2 - Purge records by activity date
Hold Expiration Date	Yes	<p>Holds with end dates that are less than or equal to the date entered will be purged. Enter in date format DD-MON-YYYY.</p> <p>This parameter is required if purge option 1, hold expiration date, is chosen.</p> <ul style="list-style-type: none"> If the Hold Expiration Date parameter has a value, the process purges holds with an expiration date (to date) that is less than or equal to the value in the 	

Parameter Name	Required?	Description	Values
		<p>parameter.</p> <ul style="list-style-type: none"> If the Hold Expiration Date parameter is Null, the process purges holds with an activity date that is less than the value in the Hold Activity Date parameter. 	
Hold Activity Date	No	Holds with activity dates that are less than the date entered will be purged. Enter in date format DD-MON-YYYY.	
Exclude Hold Type	No	Hold types specified will be excluded from the purge process. Multiple requests are permitted.	Hold Type Code Validation Form (STVHLDD)
Run Mode	Yes	Enter A to produce a listing of all selected purge data without affecting the database. Enter U to update the database after purging the selected data.	A - Audit mode U - Update mode

General Student Purge (SGPSTDN)

Updated: March 21, 2024

This process purges general student records for students who have never registered for courses based on the user-specified parameters listed below.

You can purge general student records by term for those students who are not registered, or you can purge records by term and date. You can retain high school, prior college, guardian, test score, and hold information in the database if you choose.

General student information will not be purged when the following conditions exist.

- The student has active holds.
- The student has academic history information, such as the existence of a term course maintenance record in the SHRTTRM table.

However, when the general student record is purged, the associated communication plan record, along with the person's contacts and outside interests, will also be purged.

The process checks if the SGBSTDN record is the last record for the PIDM and has a curriculum record with an associated graduation application that has not been rolled. In this case, the record will not be deleted. If the SGBSTDN record is not the last record for the PIDM, it still cannot be deleted if it has a current curriculum record with a graduation application that has not been rolled.

Note: Child records of general student records are deleted when the purge is run. Sport information is not a child record of the general student record. Therefore, sport records are not deleted when general student records are deleted. Sport records can only be deleted from SGASPT.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the term code for which records are to be purged.	Term Code Validation Form (STVTERM)
Purge Option	Yes	Choose a purge option. Enter: <ul style="list-style-type: none"> • 1 to purge 	1 - Purge records without term registration

Parameter Name	Required?	Description	Values
		<p>general student records for those students who are not registered by term</p> <ul style="list-style-type: none"> • 2 to purge general student records by term and date. 	2 - Purge records by term and date
Effective Term	No	General student records without registration whose effective terms are less than or equal to the effective term entered will be purged.	Term Code Validation Form (STVTERM)
Activity Date	No	General student records with activity dates that match the date entered will be purged. Enter in date format DD-MON-YYYY.	
Purge High School Information	No	<p>Enter:</p> <ul style="list-style-type: none"> • Y to purge the high school information for a student • N to avoid purging the high school 	<p>Y - Purge high school</p> <p>N - Do not purge high school</p>

Parameter Name	Required?	Description	Values
		information for a student	
Purge Prior College Information	No	Enter: <ul style="list-style-type: none"> • Y to purge the prior college information for a student • N to avoid purging the prior college information for a student 	Y - Purge prior college N - Do not purge prior college
Purge Guardian Information	No	Enter: <ul style="list-style-type: none"> • Y to purge the guardian information for a student • N to avoid purging the guardian information for a student 	Y - Purge guardian information N - Do not purge guardian information
Purge Test Score Information	No	Enter: <ul style="list-style-type: none"> • Y to purge the test score information for a student • N to avoid purging the test 	Y - Purge test scores N - Do not purge test scores

Parameter Name	Required?	Description	Values
		score information for a student	
Purge Hold Information	No	Enter: <ul style="list-style-type: none"> • Y to purge the hold information for a student • N to avoid purging the hold information for a student 	Y - Purge holds N - Do not purge holds
Run Mode	Yes	Enter: <ul style="list-style-type: none"> • A to produce a listing of all selected purge data without affecting the database • U to update the database after purging the selected data. 	A - Audit mode U - Update mode

Cohort Load Process (SGRCHRT)

Updated: August 27, 2020

This process is used to assign cohort codes to a group of persons selected through population selection and permits you to assign the population cohort codes in the person's recruiting, admissions, general student, and academic history records for an

effective term.

When new cohorts are inserted for students, users have the option to copy existing cohort records to the new effective term. If a student has existing cohort records that are effective for an earlier term than the term entered for processing, those records will be copied to the new effective term if the Copy all cohorts to term? **Y/N** parameter is set to Y.

If you only want to assign new cohort codes to students for a new effective term:

- Enter the cohort code(s) to be added
- Set the **Copy all cohorts** to term. **Y/N** parameter to N

If you want to assign new cohort codes to students for a new effective term and copy any current existing cohort codes to that term:

- Enter the cohort code(s) to be added.
- Set the **Copy all cohorts to term? Y/N** parameter to Y.

If you want existing cohorts to be copied to a new effective term but you don't want to add any new cohorts, then you'll need to be careful about the population you use for the process:

- Use a population who are all in the same existing cohort for an earlier term.
- Use that cohort code for the Cohort Code(s) parameter.
- Set the **Copy all cohorts to term? Y/N** parameter to Y.
- Students will get that specific cohort code copied to the new effective term.
- If students have other cohort codes, those will be copied to the new effective term.

The .lis output file displays the number of cohort codes copied for each student and in total.

Note that these records must exist to have cohort codes added; the process will not create records if one does not exist. This process accepts an input file from the population selection process to create cohort information. See the *Banner General Use* content on the Ellucian Documentation site to review the method used to create a population selection.

Parameter Name	Required?	Description	Values
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	Application Inquiry Form (GLIAPPL)
Creator ID	No	Enter the user ID of the person who	

Parameter Name	Required?	Description	Values
		created the population rules. All or none of the population selection parameters must be entered.	
Report Term	Yes	Enter the code representing the term for which the report is to be run.	Term Code Validation Form (STVTERM)
Effective Term	Yes	Enter the term code representing the effective term for which the cohort code is to be loaded.	Term Code Validation Form (STVTERM)
Cohort Code	Yes	Enter the cohort code for which the population is being loaded. All persons in the file will be loaded with this cohort code, if one exists. Multiple cohort codes may be entered.	Cohort Code Validation Form (STVCHRT)
Module	Yes	Enter the module information to which the cohort codes are to be loaded. Valid values are R - Recruiting, A - Admissions, G - General Student, and H - Academic History. Note that the	R - Recruiting A - Admissions G - General Student H - Academic History

Parameter Name	Required?	Description	Values
		persons selected through population selection must have an existing record in the module selected to be loaded. The process will not create a record for a person if one does not already exist.	
Copy all cohorts to term. Y/N	Yes	Enter Y to copy all existing cohort codes to new term for each student	Y – copy cohort codes N – do not copy cohort codes

Student Right to Know Report (SGRKNOW)

Updated: August 27, 2020

This process is used to produce data that will assist your institution in calculating graduation and completion rates by cohort and optionally by sport codes.

If sport reporting is utilized, those students who receive athletically based financial aid may be specifically selected to be processed by sport. This report also processes information based on terms that are part of a student centric period.

This report will print a summary page for each cohort processed, and if sport reporting is utilized, the report will produce a summary page per cohort, in addition to a summary page for each cohort and sport combination specified by parameter selection.

If the Print Detail Report Indicator parameter is set to Y, in addition to each summary page, a detailed list of those students in each category will also be produced.

The print order of the report output is as follows: summary of cohort, detail breakdown of

the cohort, summary of cohort/sport combination, detail of cohort/sport combination, and so on until all combinations of cohort and sport are selected, summarized, and detailed.

If no students fall into a category on the summary page (the category has all zeros on the summary page), this category will not print on the detail page. All categories print on the summary page.

Parameter Name	Required?	Description	Values
Report Term	Yes	Enter the report term for heading of the report.	Term Code Validation Form (STVTERM)
Cohort Start Term	Yes	Enter the start term for the cohorts to be processed. Only cohorts with this start term will be processed.	Term Code Validation Form (STVTERM)
Enrollment Term	No	Enter the enrollment term if a persistence rate is to be calculated for the cohort. Students must be enrolled in the term to be counted as persists. If no enrollment term is entered, no students will ever fall into the persists category.	Term Code Validation Form (STVTERM)
Cohort Code	Yes	Enter the cohort code for the cohorts to be processed. Multiple values may be entered. Enter to select all report inclusion cohort codes for	Cohort Code Validation Form (STVCHRT)

Parameter Name	Required?	Description	Values
		processing. Only cohorts with start terms matching the Cohort Start Term parameter selection will be processed. If a wildcard () is entered, only those cohorts with start terms matching the Cohort Start Term parameter or having a Print Indicator that is checked (set to Y) on the Cohort Code Validation Form (STVCHRT) will be processed.	
Sport Activity Code	No	Enter the sport activity code(s) to be processed for each cohort code. Enter % to select all possible sport activity codes for processing. Multiple values may be entered.	Banner Student Student Activity Code Validation Form (STVACTC)
Degree Level	Yes	Enter the degree level code for the cohorts to be processed. Enter % to select all possible degree levels for processing. Multiple values may be	Degree Level Code Validation Form (STVDLEV)

Parameter Name	Required?	Description	Values
		entered. This parameter will allow the user to specify the cohorts to be processed by degree level.	
Athletic Aid Indicator	No	<p>Enter Y to limit sport reporting to those athletes within the cohort and sport code who have received athletic aid.</p> <p>Enter N or leave blank if reporting all athletes. This indicator works in conjunction with the sport code and athletic aid indicator setting associated with the athlete.</p>	<p>Y - Athletic Aid</p> <p>N - All athletes (also Null)</p>
Print Detail Report Indicator	No	Enter Y to produce a detailed breakdown of student information in each category. Enter N or leave blank to suppress the detail pages. A summary page will always print for a cohort with students belonging to it.	<p>Y - Detailed student information by category</p> <p>N - Suppress detail pages (also Null)</p>
Process by Student Period	Yes	Enter Y to process a student centric period for right to	Y - Process student centric period

Parameter Name	Required?	Description	Values
		know reporting or N to not process a student centric period. The default is N.	N - Do not process student centric period

Student Attribute Load Process (SGRSATT)

Updated: September 28, 2023

Use the SGRSATT process to assign student attribute codes to the people selected from the population selection. The process allows you to assign the student attribute codes to the person's recruiting, admissions and general student records for a term.

The process performs the following functionality:

- Assigns student attributes based on the population selection.
- Copies the attributes from the students maximum term to the term defined on the job parameter when the module is set to G (General Student).
- Assigns student attributes into different modules such as:

Table 1: Modules

Modules	Description
G - General Student	Attributes are added on the Additional Student Information (SGASADD) page.
A - Admissions	Attributes are added on the Admissions Application (SAAADMS) page.
R - Recruiting	Attributes are added on the Recruit Prospect Information (SRARECR) page.

Note: SGRSATT process does not support associating a study path to an attribute code on the Additional Student Information (SGASADD) page when run for the General Student module.

Parameter Name	Required?	Description	Values
Effective Term	Yes	Enter the term code that represents the effective term for which the student attribute codes must be loaded. This parameter is mandatory.	Term Code Validation Page (STVTERM)
Student Attribute Code	Yes	Enter the student attribute code for which the population is loaded. You can enter multiple student attribute codes. This parameter is mandatory.	Student Attribute Validation Page (STVATTS)
Application	Yes	Select the list of students as per the Pop Sel Application code. This parameter is mandatory.	Application Inquiry Page (GLIAPPL)
Selection ID	Yes	Select the list of students as per the Pop Sel Selection Identifier code. This parameter is mandatory.	Population Selection Inquiry Page (GLISLCT)
Creator ID	Yes	Select the list of students as per the Pop Sel Creator ID.	

Parameter Name	Required?	Description	Values
		This parameter is mandatory.	
User ID	Yes	Select the list of students as per the Pop Sel User ID. This parameter is mandatory.	
Module	Yes	Enter the module information for which you want to load the students attribute codes. This parameter is mandatory.	The valid values are: <ul style="list-style-type: none"> • A - Admissions The Student Attribute code is loaded into the Attribute section, on the Contacts, Cohorts, Attributes tab on the SAAADMS page. • G - General Student The Student Attribute codes is loaded into SGASADD page in the Student Attribute section. • R - Recruiting The Student Attribute codes is loaded into the Attribute section,

Parameter Name	Required?	Description	Values
			on the Contacts, Cohorts, the Attributes tab on the SRARECR page.
Copy all attributes to a term	Yes	<ul style="list-style-type: none"> Setting the parameter value to Y, copies all the existing maximum effective term student attribute codes, and the new student attribute codes entered in the parameter list to the term defined in the effective term. Setting the parameter value to N, adds only the student attribute codes entered in the parameter list, to the term defined in the effective term. <p>This parameter is mandatory.</p>	

Parameter Name	Required?	Description	Values
Bypass Students Registration	Yes	<ul style="list-style-type: none"> Setting the parameter value to Y adds or copies the student attribute codes to the term defined on parameter 01 even if the student has registration records for the term. Setting the parameter value to N does not add or copy the student attribute codes to the term defined on parameter 01 when there are existing registration records for the student. 	The default value is N.
Run Mode	Yes	Enter A to indicate that the process is to be run in audit mode. Enter U to run in update mode, which loads student attribute codes to respective Banner pages. This parameter is	A - Audit mode U - Update mode The default run mode is A - Audit Mode.

Parameter Name	Required?	Description	Values
		mandatory.	

Student Graduation Data Update Process (SGRSGDU)

Updated: December 11, 2020

The Student Graduation Data Update process allows you to update the Expected Graduation Date, Graduation Term, and Graduation Year for multiple students for a selected term on the General Student page (SGASTDN).

SGRSGDU allows you to do the following:

- Use multiple population selection parameters such as Application, Selection ID, Creator ID and User ID to filter for the predefined population selection.
- Insert multiple rows in Student Status Code, Degree Code, Level Code, College Code, Campus code parameters.
- Either New Expected Graduation Date OR New Graduation Term OR New Graduation Year parameter value is required to run the job.
- If the student has registration, academic history and degree awarded records, the process updates the Expected Graduation Date, Graduation Term and Graduation Year field every time the job is run.
- The Student Status Code, Degree Code, Level Code, College Code and Campus Code parameters value is considered for the students primary curriculum.
- Require Enrollment Status parameter helps to filter the student records based on the Enrollment Information records, that is SFBETRM table for the respective Term.
- The population selection parameters are independent of other parameters, that is, Require Enrollment Status, Student Status Code, Degree Code, Level Code, College Code and Campus Code.

Note: The job process cannot be run with both population selection parameters and other parameters simultaneously.

- In case of any error, an appropriate error message is alerted to the users.
- Run the process in Audit or Update mode.

Parameter Name	Required?	Description	Values
Effective Term	Yes	Enter the Effective term code for which you want to update the data.	Term Code Validation (STVTERM)
New Expected Graduation Date	No	Enter the expected graduation date which you want to update in SGASTDN.	
New Graduation Term	No	Enter the expected graduation term which you want to update in SGASTDN.	Term Code Validation (STVTERM)
New Graduation Year	No	Enter the expected graduation year which you want to update in SGASTDN.	
Require Enrollment Status?	Yes	Enter Y or N. <ul style="list-style-type: none"> Y- Checks if Enrollment information records exist on SFBETRM table for the student. N- Does not check if Enrollment information records exist on SFBETRM table for the student. 	Require Enrollment Status? [(Y)es / (N)o].
Student Status Code	No	Enter the student status code of the	Student Status Code Validation (STVSTST)

Parameter Name	Required?	Description	Values
		primary curriculum. You can create multiple rows for this entry.	
Degree Code	No	Enter the degree code of the primary curriculum. You can create multiple rows for this entry.	Degree Code Validation (STVDEGC)
Level Code	No	Enter the student level code of the primary curriculum. You can create multiple rows for this entry. Enter % for all levels.	Level Code Validation (STVLEVL)
College Code	No	Enter the college code of the primary curriculum. You can create multiple rows for this entry.	College Code Validation (STVCOLL)
Campus Code	No	Enter the campus code of the primary curriculum. You can create multiple rows for this entry.	Campus Code Validation (STVCAMP)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		<p>population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Form (GLISLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection	Creator ID is optional to run with the population selection.

Parameter Name	Required?	Description	Values
		identifier. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or none of the population selection parameters must be entered.	User ID is optional to run with the population selection.
Run Mode	Yes	Enter A to run in Audit mode and print an audit report. Enter U to update the database records. The default is A.	A - Audit mode (default) U - Update mode

View the SGRSGDU process reports

Updated: December 11, 2020


You can run the SGRSGDU process to generate and view the list of students, the location where the data was updated, and a summary on the total number of updated student records.

Procedure

1. Access the **Process Submission Controls (GJAPCTL)** page.
2. Provide parameter values for the fields as given in the table:
3. Click **SAVE**.

Result: After the SGRSGDU process runs, it generates a unique log file.

4. To review the log file, perform the following steps:

- a. From the top panel, click the Related icon .
- b. Select **Review Output [GJIREVO]**.

Result: This opens the **Saved Output Review (GJIREVO)** page.

- c. Populate the required fields and click **Go**.
- d. Review the .log and .lis files to see the processed data and verify the exceptions if any.

Figure 1: Sample Report

```

January 10, 2021 6:05:28 AM
                                Ellucian University- 1
                                Student Graduation Data Update
                                SGRSGDU
                                Page 1
                                ** REPORT CONTROL INFORMATION **
                                -----

PROGRAM NAME: SGRSGDU
PROGRAM VERSION: 8.21
Report Begin Date/Time: January 10, 2021 6:05:28 AM

-----
JOB PARAMETERS
-----

EFFECTIVE TERM: 199610
NEW GRADUATION DATE: 22-JAN-2003
NEW GRADUATION YEAR: 200310
REQUIRE ENROLLMENT STATUS: N
STUDENT STATUS CODE: FD, MH, 12
DEGREE CODE: DIPL, CPR
LEVEL CODE: UG, 05
COLLEGE CODE: 01
CAMPUS CODE: M
APPLICATION:
SELECTION ID:
CREATOR ID:
USER ID:
RUN MODE: U

-----
Student ID      Name
-----
210009101      Adams, Andrew
210009102      Burns, Bruce
210009201      King, Kevin
210009202      Long, Linda
210009301      Gilbert, Don
210009302      Vicker, Victoria
210009401      Nixon, Bruce
210009402      Smith, Pat
-----

TOTAL NUMBER OF STUDENT RECORDS UPDATED: 20
-----
Report End Date/Time: January 10, 2021 6:05:29 AM
Connected

```

Student Report (SGRSTDN)

Updated: August 27, 2020

This report is used to list student information by term in name or ID order for a selected

population.

Parameter Name	Required?	Description	Values
Term - Optional	No	Enter the term code representing the term for which you want to list the student information.	Term Code Validation Form (STVTERM)
Report Sequence (N=Name, I=ID)	No	Enter I to print in ID number order; enter N to print in name order.	I - ID number order N - Name order
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	

Veteran Report (SGRVETN)

Updated: August 27, 2020

This report is used to list students with veteran information by term. It includes not only the student's veteran type and number, but also the certification hours and current schedule of classes. Schedule and veteran number data are required.

In order to produce this report, three components must exist in Banner Student.

- Information must be entered in the Veteran Information window of SGASTDN for the **Veteran Type**, **Term**, **Certification Credit Hours**, and **Certification Date** fields. Valid values for the veteran type code come from STVVETC. The term code is the term of veteran certification. The veteran certification credit hours for the term are entered in format 99.99. The veteran certification date is entered in format DD-MON-YYYY.
- The veteran file number must exist on the General Person Form (SPAPERS) in the **Veteran File Number** field.

- The student must be registered for courses on the Student Course Registration Form (SFAREGS).

The term code entered in the Veteran Information window of SGASTDN and on SFAREGS must match the term code entered in the Term parameter for the report.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term code representing the term for which you want to list the students' veteran information.	Term Code Validation Form (STVTERM)

Create Cohort for Continuing Students (SOPCCDF) process

Updated: September 19, 2024

The SOPCCDF process allows you to create cohort for continuing students from the CSV file for all the records.

The process reads the OWNSTU and NUMHUS fields from the input file and uses the COHORT code and TERM code as parameters to create entries in the SGACHRT page for the continuing students. To run the SOPCCDF process, ensure that you import the input seed data file in CSV file first to the input file path directory.

The process parameters are:

Parameter Name	Required?	Description	Values
Oracle Directory	Yes	Enter the Oracle directory name.	N/A
Input file name	Yes	Name of the CSV file comprising the seed data.	N/A
Cohort code	Yes	Enter the cohort code.	N/A
Term code	Yes	Identifies the term this cohort becomes effective.	N/A

Ellucian recommends that you ensure the following as prerequisites:

- Import the seed data file to the input file path directory and copy the input file name and file path.
- Create the seed data in the CSV file format only.

To run the process, ensure the following:

- Enter the path of the file, input file name, term code, and Cohort code attribute. The process parses the data from the CSV file and after performing logic operations, the process inserts the data into the SGACHRT page for the continuing students.
- The system generates messages in the LOG file for you to view.
- Input file and output file should be in CSV file type only.

Cohort Creation of New Entrant (SOPCNDF) process

Updated: December 14, 2023

The SOPCNDF process enables automatic creation of HESA DF cohorts for a given reference period for new entrants including study path. The process also includes the facility to re-run as students enroll throughout the reference period.

The process parameters are:

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code	List of Term codes from STVTERM page
Populate Student Report Type	Yes	Enter Y/N to populate the Student Report Type in the SOAENRE page for the student.	Yes/No
Populate SGACHRT Data	Yes	Enter Y/N for cohort creation.	Yes/No
Cohort Code	No	Enter the cohort code.	List of Cohort code from

Parameter Name	Required?	Description	Values
			STVCHRT Page
Report Type	No	Select the Student course Type from the list of values.	AOR, HESA DF,HESA ITT, and ILR
Clear Student Report Data	No	Enter Y/N to clear the data of the Student Report Type field I the SOAENRE page for all the students.	Yes/No

To populate the SGACHRT Data, ensure that you select the following values:

Student Eligibility	Student Eligibility
HESA DF	<ul style="list-style-type: none"> • HESA DF • HESA DF and ESFA • HESA DF and ITT • HESA DF • ESFA and ITT
HESA ITT	<ul style="list-style-type: none"> • HESA DF and ITT • HESA DF, ESFA, and ITT
AOR	<ul style="list-style-type: none"> • AOR - Offshore • AOR - Distance Learning/Not UK
ILR	<ul style="list-style-type: none"> • HESA DF and ESFA • ESFA Only

For the process to run, ensure the following.

- (Required) Enter the Term Code, Populate Student Report Type, and Populate SGACHRT data.
- (Optional) Enter Cohort Code, Report Type, and Clear Student Report data.

Note: The system generates messages in the .LOG file and .LIS file for you to view.

Remove Duplicate SID From XML (SOPMSDF) process

Updated: September 19, 2024

The SOPMSDF process allows you to remove the duplicate SIDs and merges the OWNSTUs from given input .xml file for all records having duplicate SIDs. You can also sort the XML file as per the SID values.

This results in a single entry for that SID with multiple engagements in an output .xml file. To run this process, ensure that you import the input seed data file in .XML first to the input file path directory.

The process parameters are:

Parameter Name	Required?	Description	Values
Oracle Directory	Yes	Enter the Oracle directory name that contains the file	N/A
Input file name	Yes	Name of the .XML file	N/A
Output file name	Yes	File which stores the output at the given Input file path.	N/A
SID sorting (Y/N)	No	To store the Y or N values	Y: Sort the XML as per the SID value N: Do not sort the XML as per the SID value

Ellucian recommends you ensure the following as prerequisites.

- Import the seed data file to the input file path directory and copy the input file name

and file path.

- Create the seed data in the .XML format only.

For the process to run, ensure the following.

- Enter the Oracle directory name, input file name and output file name attribute. The process parses the data from the .XML file and after performing logic operations the output file will be generated which can be downloaded from the given input file path directory.
- The system generates messages in the .LOG file for you to view.
- Input file and output file should be .XML file type only.
- Input file path directory should have write permissions to generate output file.

HEA Graduate Outcome Ireland (SORHEGO) process

Updated: June 20, 2024

The SORHEGO process collects survey responses from Higher Education Institutions (HEI) graduates for a specific return year and institution type.

The process collects the following types of responses:

- The graduate has answered the survey or the administrator has answered survey on behalf of the graduate
- No survey response given by the graduate
- If the graduate has enrolled in a program after the return year and the institution type is Institutes of Technology/Technological Universities
- If the graduate has enrolled in a program after the return year and the institution type is Universities

The process parameters are:

Parameter Name	Required?	Description	Values
Return Year	Yes	Enter the year for which the survey needs to be	Year

Parameter Name	Required?	Description	Values
		<p>executed.</p> <p>This value is a four-digit numeric value that you store. For example, for the 2023 survey, the return year is 2023 in all cases.</p>	
Institution Type	Yes	Select the type of institution.	<p>Menu values available are:</p> <ul style="list-style-type: none"> • Institutes of Technology • Technological Universities • Universities
Institution Name	Yes	The identifier of the institute.	<p>Free text entry field</p> <p>Maintain this field as a free text to allow users to provide the institution name or provide seed data with the institution code and description.</p>

The HEI study collects the survey from graduates approximately nine months after their completion of study. The data that the process submits in the record is obtained using a survey instrument, that is centrally defined by the HEA and locally managed by HEIs.

The output is in XML file format that contains the details of the student and the responses of their responses to the survey.

Registration

Updated: June 20, 2024

Assign Registration Pin Process (SFRAPIN)

Updated: January 28, 2021

A new job process SFRAPIN is created to assign a registration pin for a specified term to a defined set of students.

Alternative PIN processing allows institutions to require a student to enter an additional PIN before the student can perform initial add/drop activity for a term.

Institutions use this functionality to “force” a student to contact an advisor, who will provide the PIN, before initially registering for the term. When a student tries to register for the first time (through either the Add or Drop Classes page or the Look Up Classes results page), if alternative PIN processing is turned on and an alternative PIN is entered for the student on the Alternate Personal Identification Number Form (SPAAPIN), then the system displays the Alternate PIN Verification page. (If no alternative PIN is entered on SPAAPIN, the system displays the requested page without displaying this page first.)

You can run the job multiple times, however the log file does not display any students to process. In such cases you can sign in to SPAAPIN, select the student associated with the term and delete the record, or you can sign in to the oracle table SPRAPIN and select the relevant record by providing the student pidm and term and delete the record. After this task you can run the SFRAPIN process to generate the new PINs. You can assign the same pin range to students belonging to different degrees along with other optional parameters. Pin allocation happens on a random basis.

Banner does not have any report to display the student associated with alternate pins; however, you can sign in to Banner page SPAAPIN by entering the term and the student ID to see the student associated with the PIN.

SFRAPIN allows you to do the following:

- Use multiple student parameters like Degree code, Student level code, Classification code, Minimum hours earned, Maximum hours earned and so on to filter, or by using population selection parameters such as Application, Selection ID, Creator ID and

User ID to filter for the predefined population selection.

- Set a PIN start range and end range, which will be assigned to the defined set of students filtered using either Student parameters or Population selection parameters. The students are identified on the given filter criteria and randomly assigned with a PIN, within the mentioned start and end range. For example if 000000 is the start range and 111111 is the end range, and if there are 2 students, they can be assigned with 000010 and 002001 in random, which is within 111111.
- Run the process in Audit or Update mode.

Parameter Name	Required?	Description	Values
Registration Term	Yes	Enter the term code for which group needs to be created.	Term Code Validation (STVTERM)
Alternate Pin Range - START	Yes	Enter the starting range of the Alternate PIN.	Value from 1 - 999999 Process Submission Controls (GJAPCTL)
Alternate Pin Range - END	Yes	Enter the ending range of the Alternate PIN.	Value from 1 - 999999. End range must not be less than Start range. Process Submission Controls (GJAPCTL)
Student Level Code	No	Enter the student level code (such as undergraduate or graduate) for which you want to filter the students to be assigned with the PIN.	Level Code Validation (STVLEVL)

Parameter Name	Required?	Description	Values
Degree Code	No	Enter the student's degree code for which you want to filter the degree assigned with the PIN.	Degree Code Validation (STVDEGC)
Student Type	No	Enter the student type code for which you want to filter the student type assigned with the PIN.	Student Type Code Validation (STVSTYP)
Attribute Code	No	Enter the attribute code for which you want to filter the attribute assigned with the PIN.	Attribute Code Validation (STVATTS)
Classification Code	No	Enter the classification code for which you want to filter the classification assigned with the PIN.	Classification Code Validation (STVCLAS)
Minimum Hours Earned	No	Enter the minimum hours earned for the student.	The Minimum Hours Earned is a parameter to filter the students as per the students hours earned value.
Maximum Hours Earned	No	Enter the maximum hours earned for the student.	The Maximum Hours Earned is a parameter to filter the students as per the students hours earned value.

Parameter Name	Required?	Description	Values
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Form (GLISLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of	Creator ID is optional

Parameter Name	Required?	Description	Values
		the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	to run with the population selection.
User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or none of the population selection parameters must be entered.	User ID is optional to run with the population selection.
Run Mode	Yes	Enter A to run in Audit mode and print an audit report for fee assessment. Enter U to update the database records. The default is A .	A - Audit mode (default) U - Update mode

View the SFRAPIN process reports

Updated: December 03, 2020


You can run the SFRAPIN process to generate and assign Registration pins to students.

Procedure

1. Access the **Process Submission Controls (GJAPCTL)** page.
2. Provide parameter values for the fields as given in the table:
3. Click **SAVE**.

Result: After the SFRAPIN process runs, it generates a unique log file.

4. To review the log file, perform the following steps:

- a. From the top panel, click the Related icon .
- b. Select **Review Output [GJIREVO]**.

Result: This opens the **Saved Output Review (GJIREVO)** page.

- c. Populate the required fields and click **Go**.
- d. Review the `.log` and `.lis` files to see the processed data and verify the exceptions if any.

Assign Time Ticketing Group Process (SFRGRUP)

Updated: December 03, 2020

Registration Time-Ticketing allows institutions to optionally establish priority driven registration period time slots for registration through Banner Student Self-Service registration.

You can use the SFRGRUP process to automate the building of registration group codes and assign those codes to students who are eligible to register for a specified term.

You cannot assign a student on this form if you define a registration group and not prioritize it. You can assign only one registration group to a student for a specific term. You cannot make registration group assignments when the student status for the selected term does not allow registration (that is, the Allow Registration flag on the Student Status Code Validation Form (STVSTST) is cleared or has N status).

SFRGRUP allows you to do the following:

- Use multiple student parameters like Degree code, Student level code, Classification

code, Minimum hours earned, Maximum hours earned and so on to filter, or by using population selection parameters such as Application, Selection ID, Creator ID and User ID to filter for the predefined population selection.

- Run the process in Audit or Update mode.
- Creates student registration group records (SFBRGRP) for every general student in the database whose student status (SGBSTDN_STST_CODE) allows registration (STVSTST_REG_IND = Y). (These students represent the IDs that will be entered in the **Key Information** of SFARGRP).
- Creates registration group code records (SFBWCTL) and assigns the appropriate code to each of the students (SFBRGRP) based on the values entered in the job parameters.

Parameter Name	Required ?	Description	Values
Registration Term	Yes	Enter the term code for which group needs to be created.	Term Code Validation (STVTERM)
Group Code	Yes	Enter the student's group code. The group codes are created in the Registration Group Control Page (SFARCTL) and assigned to the students who are eligible to register.	Maximum character length for Group Code is 10.
Maximum Students Per Group	Yes	Enter a value for maximum students per group.	Number of students in each group. On reaching maximum students per group, a new group is created by appending suffix starting from 01.
Student Level Code	No	Enter the student level code (such as undergraduate or	Level Code Validation (STVLEVL)

Parameter Name	Required ?	Description	Values
		graduate) for which you want to filter the students to be assigned with the group.	
Degree Code	No	Enter the student's degree code for which you want to filter the degree assigned with the group.	Degree Code Validation (STVDEGC)
Student Type Code	No	Enter the student type code for which you want to filter the student type assigned with the group.	Student Type Code Validation (STVSTYP)
Attribute Code	No	Enter the attribute code for which you want to filter the attribute assigned with the group.	Attribute Code Validation (STVATTS)
Classification Code	No	Enter the classification code for which you want to filter the classification assigned with the group.	Classification Code Validation (STVCLAS)
Minimum Hours Earned	No	Enter the minimum hours earned for the student.	The Minimum Hours Earned is a parameter to filter the students as per the students hours earned value.
Maximum Hours Earned	No	Enter the maximum	The Maximum Hours

Parameter Name	Required ?	Description	Values
		hours earned for the student.	Earned is a parameter to filter the students as per the students hours earned value.
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Form (GLISLCT). All or	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required ?	Description	Values
		none of the population selection parameters must be entered.	
Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	Creator ID is optional to run with the population selection.
User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or none of the population selection parameters must be entered.	User ID is optional to run with the population selection.
Run Mode	Yes	Enter A to run in Audit mode and print an audit report for fee assessment. Enter U to update the database records. The default is A .	A - Audit mode (default) U - Update mode

View the SFRGRUP process reports

Updated: April 06, 2021


You can run the SFRGRUP process to generate and assign groups to students.

Procedure

1. Access the **Process Submission Controls (GJAPCTL)** page.
2. Provide parameter values for the fields as given in the table:
3. Click **SAVE**.

Result: After the SFRGRUP process runs, it generates a unique log file.

4. To review the log file, perform the following steps:

- a. From the top panel, click the Related icon .
- b. Select **Review Output [GJIREVO]**.

Result: This opens the **Saved Output Review (GJIREVO)** page.

- c. Populate the required fields and click **Go**.
- d. Review the `.log` and `.lis` files to see the processed data and verify the exceptions if any.

Registration Fee Assessment Process (SFRFASC)

Updated: August 27, 2020

This process is used to run batch processing of registration fee assessments and to migrate from the old processing (SFRFASM or SFRFAS1). Running SFRFASC will provide the most recent assessment data for the audit history table. SFRFASC allows you to do the following.

- Use a population selection.
- Process assessments for a single ID or a list of IDs.

- Use an enrollment status (E) or collector mode (C).
- Print audit records (A), student accounting records (T), or both (B).
- Use separate date parameters for refunding by total versus effective dating of assessments.
- Run the process in Audit or Update mode.

Note: When you are migrating from the old processing to the current processing, the Create Accounting Records parameter should be set to N, to not insert TBRACCD records into accounting. The Run Mode parameter should be set to U (Update) to update the database.

SFRFASC runs in conjunction with the settings of the **Registration Fee Assessment On-line (Indicator)** and the **Web Self-Service and Voice Response Assessment On-line (Radio Group)** on SOATERM.

- When registration records are processed through self- service and through SFAREGS, and the **Registration Fee Assessment On-line (Indicator)** is unchecked (set to N) and the **Web Self-Service and Voice Response Assessment On-line (Radio Group)** is set to Not Available (meaning no assessment information has been recorded), then this process should be run for all students within a term.
- When the **Registration Fee Assessment On-line (Indicator)** is checked (set to Y), indicating that online fee assessment is available, then this process should be run in collector mode, in case online assessment has been deferred due to the process option setting of the Fees field on SFAREGS being changed to N (Batch for Updates) or B (Batch Only), instead of using the default setting of Y (Immediate).
- Fee assessment can also be deferred using the Registration Mass Entry Form (SFAMREG).
- When the **Registration Fee Assessment On-line (Indicator)** on SOATERM has been checked (set to Y), it should remain checked.

Batch fee assessment can be run in either Update mode or Audit mode. Use Update mode to post the charges on the student's account (TBRACCD record) for the term. You may want to use Audit mode to print a report of what the assessment results would be if the process was run in Update mode. SFRFASC uses assessment rules defined on the Registration Fee Assessment Rules Form (SFARGFE), in addition to as any fees posted through the Registration Additional Fees Control Form (SFAAFEE), to calculate registration-related charges.

The output from SFRFASC can be printed in either name or ID order and includes the detailed transactions that have been posted to the student's account record. If you have chosen to display the audit history records, that information will also be printed on the output. These printed charges result from the entries made in registration and show the effective dates and net change to the student's account. The audit history entries show the actual date of the assessment, not the effective date. Whenever fee assessment is run in Update mode, information about the student's assessment is placed in the audit history table.

Before a student bill is produced using the Student Invoice/Billing Statement (TSRCBIL), you must have assessed registration fees either through batch or online processing. You have the option to create a schedule/bill collector record during batch fee assessment processing for any students with a change in fee assessment (either additional charges or credits). Collector records will not be written for students who do not have any changes. To create schedule/bill collector records, enter `Y` in the Add Invoice Collector Record parameter.

If you are running batch fee assessment from the command line, the error message *Invalid request; Update student account not requested* will not be displayed if you enter `N` in the Create Accounting Records parameter (displayed on the command line as Create Accounting Detail Records) but then enter `Y` for the Add Invoice Collector Record parameter. Because you are not creating any changes to the student's accounting records, the collector record for student bills is not populated. If schedule/bill collector records are needed, both the Create Accounting Records and Add Invoice Collector Record parameters must be set to `Y`.

If collector records are created, they may be used either for processing student bills in invoice mode or student schedule/bills through the Student Invoice/Billing Statement (TSRCBIL). If it is anticipated that the collector records will be processed by TSRCBIL in sleep/wake mode, an appropriate value should be entered for the Printer parameter. This value should be one of the valid printer selections from the Printer Validation Form (GTVPRNT) which has been specifically set up by your institution for use with sleep/wake processing. If you are not using sleep/wake processing, enter any valid printer code to populate the collector records. The same code should be entered for the Printer parameter in TSRCBIL.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the registration term for which fee assessment is to be	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		processed.	
Assessment Date	No	Enter the date (in format DD-MON-YYYY) to be used as the effective date for all of the fee assessment transactions generated by this process.	
<p>The following hierarchy is used when assigning the effective date: first - the date in the Registration Fee Assessment Effective Date field on SOATERM, second - the date in this parameter, and third - the Banner system date.</p> <p>The date options are also affected by the settings of two fields on the Student Billing Control Form (TSACTRL): the Effective Date radio group <i>Current Date</i> or <i>Date of Charges</i> options and the Accept Charges (Indicator). When the Effective Date field on TSACTRL is set to <i>Date of Charges</i> (C), and a future date exists in SOATERM or in this parameter, the future date will always be used. If the Effective Date field on TSACTRL is set to <i>Current Date</i> (T), and a future date is chosen, if the Accept Charges (Indicator) for the student is checked (set to Y), today's date will be used, even if this parameter is set to a future date or a future date exists on SOATERM.</p>			
Student ID	No	Enter the student's ID when you are running the assessment process for a single ID.	
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Form (GLISLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	

Parameter Name	Required?	Description	Values
User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or none of the population selection parameters must be entered.	
Batch Type	No	Enter c to process all entries from the SFRBTCH collector table. Enter E to define a group of students for assessment by enrollment status.	C - Collector E - Enrollment status
Select the enrollment status code using the Enrollment Status parameter. Whenever an assessment is processed for a student or term, or both, no matter how the assessment is invoked, maintenance is performed on the SFRBTCH collector table for the student and term being processed. If a collector record exists for the student or term, or both being assessed, the collector record is deleted. (The purpose of the collector record is to make sure the student is assessed.) When assessment is run using a batch type of c (collector), all records in SFRBTCH for the term specified will be processed and subsequently deleted from the table.			
Enrollment Status	No	Enter the enrollment status code for the fee assessment or leave blank for all.	Enrollment Status Code Validation Form (STVESTS)
Full or Part Time Indicator	Yes	Enter the student course load for the assessment. Enter F for full-time, P for part-time, or enter % for all. The default is %.	F - Full-time P - Part-time % - All

Parameter Name	Required?	Description	Values
		This parameter looks at the value in the SGBSTDN_FULL_PART_IND field.	
Assessment Type Rule	Yes	Enter the rule type to use for the assessment. Enter P for a pre-registration bill or R for registration rules. The default is R.	P - re-registration bill R - Registration
Accounting Detail to Print	Yes	Enter the student accounting detail to be printed on the assessment. Enter C to print the current student accounting only, A for all student accounting for the term, or N for no student accounting detail. The default is C.	C - Current student accounting only A - All student accounting for term N - None
Report Type	Yes	Enter the report type for the assessment. Enter A for audit history records only, T for TBRACCD (student accounts receivable charges and payments) records, or B for both. The default is T.	A - Audit history records only T - Student Accounts Receivable records B - Both
Sort Order	Yes	Enter the sort order	N - Sort by name

Parameter Name	Required?	Description	Values
		for the report detail. Enter N to sort by name or I to sort by student ID. The default is N.	I - Sort by student ID
Add Invoice Collector Record	Yes	Enter Y to create a TBRCBRQ (invoice collector) record or N to not create an invoice collector record. The default is N. No collector records for student schedule/bills will be created if the Create Accounting Records parameter is set to N.	Y - Add invoice collector record N - Do not add invoice collector record
Invoice Printer	No	Enter the code for the destination printer where the invoice is to be printed.	Printer Validation Form (GTVPRNT
Create Accounting Records	Yes	Enter Y to create TBACCD (student accounts receivable charges and payments) student accounting records or N to not determine the student accounting information based on the assessments. The default is Y.	Y - Create student accounting records N - Do not create student accounting records

Parameter Name	Required?	Description	Values
		Schedule/bill collector records will not be created unless this parameter and the Add Invoice Collector Record parameter are both set to Y.	
Warning! When the Create Accounting Records parameter is set to N and the Run Mode parameter is set to U, SFAFAUD records are created for the assessed students, but the charges are not transferred to TSAAREV. If this is noticed before the next run of SFRFASC, deleting the newly created SFAFAUD records and re-running SFRFASC will update TSAAREV. However, if subsequent runs of SFRFASC have been performed before the error is discovered, there is no method available to update TSAAREV, and the charges will have to be posted manually.			
Refund by Total Refund Date	No	<p>Enter the date of the refund by total refund period in format DD-MON-YYYY. This date establishes the percent refund to be used for any dropped courses as determined by the SFARFND table.</p> <p>If you are using refund by total, and no date is provided here, and there are unprocessed dropped courses that qualify for refunds,</p>	

Parameter Name	Required?	Description	Values
		the refunds will not be calculated.	
Run Mode	Yes	Enter A to run in Audit mode and print an audit report for fee assessment. Enter U to update the database records. The default is A .	A - Audit mode U - Update mode

Purge Fee Assessment Audit Process (SFPFAUD)

Updated: August 27, 2020

This process is used to purge audit history records from the database.

SFPFAUD allows you to do the following:

- Run the purge process for range of dates for transactions, for a specific term, or for an ID.
- Keep only the last assessment records.
- Print summary or detail information.
- Run the purge in Audit or Update mode.

The last assessment should be kept when the current term is active and additional assessments are going to occur for that term. If all records are purged for a given term and section fees or other additional fees exist, fee assessment may need to be run twice to ensure accurate assessment.

This process prevents the intermediate assessment audit that is created to handle records with a status of DD from being purged. These interim records will not be purged until a flat charge rule qualification has re-occurred. This will ensure that future assessments will have accurate previous assessment records available for fee assessment processing.

The process deletes SFRFAUD rows for qualified students by assessment rule type (STUDENT, LEVEL, CAMPUS, ATTR). The process considers if a student has had prior flat rule qualification but has been reassessed due to having a drop/delete issued. Because the student's assessment in essence starts over when the drop/delete is realized by assessment, any prior assessment audit records that record prior flat charge rule qualification can be safely purged.

SFPFAUD first determines if a drop/delete scenario has been handled by assessment. If it has, any assessment audit before the drop/delete being handled can be purged. The process checks to see if a date is found for when a drop/delete was handled, and then goes on to delete all assessment audit before the drop/delete, making sure to retain the last assessment audit.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the registration term code for which fee assessment audit history records are to be purged.	Term Code Validation Form (STVTERM)
Transaction Start Date	No	Enter the date for the beginning of the range for which fee assessment audit history records are to be purged. Use format DD-MON-YYYY.	
Transaction End Date	No	Enter the date for the end of the range for which fee assessment audit history records are to be purged. Use format DD-MON-YYYY.	
Student ID	No	Enter the ID of the student for which fee assessment audit history records are to	

Parameter Name	Required?	Description	Values
		be purged.	
Retain Last Assessment Audit	Yes	<p>Enter y to retain audit history records for the last assessment. Enter n to not retain audit history records for the last assessment. The default is y.</p> <p>Warning! <i>The last assessment audit history records are used by the fee assessment process to perform critical refund by total and refunding with flat and overload hour calculations. Purging all records may result in incorrect assessments when fee assessment is run again.</i></p>	<p>Y - Keep last assessment</p> <p>N - Do not keep last assessment</p>
Report Type	Yes	Enter d for a detailed report with student ID and name, or enter s for a summary report (record count). The default is s .	<p>D - Detail report</p> <p>S - Summary report</p>
Run Mode	Yes	Enter a to produce a listing of all selected purge data without affecting the database. Enter u to	<p>A - Audit mode</p> <p>U - Update mode</p>

Parameter Name	Required?	Description	Values
		update the database after purging the selected data. The default is A.	

Unduplicated Headcount Report (SFRHCNT)

Updated: August 27, 2020

This report produces headcount totals by level and major for all students for the term who have a student registration status (STVESTS) with the **Affect Headcount** check box checked (set to Y).

Other data for each level/major group includes campus, session residency, sex, ethnic code, and classification. A grand total of all enrolled students is also reflected.

Note: Student classification rules must exist for students of all levels. If classification rules do not exist for a certain level of students, they will NOT be reported in the Unduplicated Headcount Report (SFRHCNT).

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term code representing the term for which the report is to be generated.	Term Code Validation Form (STVTERM)

Registered, Not Paid Process (SFRRNOP)

Updated: December 14, 2023

This process permits the reporting or reporting and deletion of student registrations in a term for which financial arrangements/payments have not been made.

The Acceptance field on the Student Course Registration Form (SFAREGS), defaults to N when a registration is first processed. This flag is changed from N to Y through the use of

the Student Payment Form (TSASPAY), when a student makes payment, or arranges terms for payment. The flag can be changed on SFAREGS to **C**, for confirmed, to indicate that the student's pre-registration has been confirmed, but payment has not yet been made.

The Registered, Not Paid process deletes the registration records for the term (in addition to ETRM records) for those students with an **N** or those with an **N** and a **C** in the Acceptance field of SFAREGS. To make sure no orphan records are created during the deletion process, the SFRAREG, SHRCMRK, SHRMRKS, and SHRSMRK records will be deleted with the SFRSTCR records.

The process can be run in Audit or Update mode. Students whose registration records are deleted through SFRRNOP are also dropped from the Class Roster Form (SFASLST). The report lists all students affected in alpha order along with their addresses. This process also posts adjusting entries to the student's account for any charges associated with the dropped registration and delete time status history records if they exist.

Seat Assignment feature can impact the Registered, Not Paid Process (SFRRNOP), when seat assignment is enabled, please run the Section Seat Enroll Update (SPPSEAT) in batch, and not in sleep wake, before running the Registered, Not Paid Process (SFRRNOP).

Note: The process will bypass Elevate registration records based on the integration partner code. When the SSBSECT_INTG_CDE field on SSASECT is set to **ELEV8**, the record is not considered by the process.

Parameter Name	Required?	Description	Values
Processing Term	Yes	Enter the term code representing the term for which the process is being run.	Term Code Validation Form (STVTERM)
Update Database	Yes	Enter Y to delete registration records from SFAREGS for students for the term (based on the Type parameter) and back out the registration charges for the term, or N to print a report	Y - Delete registrations N - Do not delete

Parameter Name	Required?	Description	Values
		without deleting registration records or backing out charges.	
Type (C or N)	Yes	Enter N to affect only those students with an N in the Acceptance field, or enter C to affect both students with an N and with a C in the Acceptance field.	N - Accept Charges = N C - Accept Charges = N or C
Date for Census Processing	No	Enter date for which census enrollment information should be affected. If this date is less than or equal to either the census one or census two date for the course being dropped, the census enrollment counts will be reduced. If the date is greater than the census dates, the course will be dropped, but the student will not reduce the census enrollments. Leave blank for today; enter in date format DD-MON-YYYY.	
Address Selection Date	No	Which address, effective on this date, do you want to print	

Parameter Name	Required?	Description	Values
		on the Registered Not Paid Report. Leave blank for today; enter in date format DD-MON-YYYY.	
Address Hierarchy	Yes	<p>Enter the address type to be printed on the Registered Not Paid report; multiple requests are permitted and must be entered in priority sequence.</p> <p>For example, 1MA 2PR will first print the mailing address, and if none is found, will print the permanent address. Enter each parameter then hit return for the next prompt.</p>	Address Type Code Validation Form (STVATYP)
Third Party Exempt Indicator	Yes	<p>When this parameter is set to Y, and third party contract memos exist for the student for the term, the student will be exempt from the deletion process.</p> <p>When this parameter is set to N, the student is not exempt and will be processed, even if</p>	<p>Y - Exempt</p> <p>N - Not exempt</p>

Parameter Name	Required?	Description	Values
		potential payments exist.	
Effective Date of Drop	No	<p>Enter the date of the drop in DD-MON-YYYY format for the effective date that is to be recorded in TBRACCD. If this parameter is left blank, the original effective date on the transaction(s) being reversed will be used.</p> <p>If you want to use the system date for processing, you must enter that date.</p>	
Application	No	Application is Required to run with Population Selection.	Application Inquiry (GLIAPPL)
Selection ID	No	Selection ID is Required to run with Population Selection.	Population Selection Inquiry (GLISLCT)
Creator ID	No	Creator ID is Required to run with Population Selection.	
User ID	No	User ID is Required to run with Population Selection.	

PDP Field Extract Process (SFPPDPE)

Updated: June 28, 2023

Use the PDP Field Extract Process (SFPPDPE) to extract data from the reporting tables and produce the supplemental file that they can submit to the National Student Clearinghouse - Postsecondary Data Partnership (NSC-PDP).

High-level statement of need

The National Student Clearinghouse – Postsecondary Data Partnership (NSC-PDP) process reports on students, student registrations, and student Financial Aid information.

Historically, *supplemental fields* have not been included in the data file sent for submission. While institutions can create the data manually, the process is time-consuming and error-prone. To improve this process and enable the NSC to add one or two fields annually, Ellucian now provides functionality that allows institutions to populate and include this supplemental data in the reports.

Specifically, this functionality allows institutions to:

- provide a batch update process to populate the data
- provide online administrative access to update these fields
- provide a batch extract process to supply the data to the NSC-PDP process

The following NSC-PDP reports may require supplemental data fields:

- Cohort Report: provides information about a student
- Course Report: provides information about the classes a student is registered for in a specified term
- Fin Aid Report: provides information about a student's financial aid status for the specified award year

Institutions can store the NSC-PDP report data for students in one of the following tables:

- Cohort data will be stored in the Supplement Student Data for PDP process (SFRPDPS)
- Registration data will be stored in the Supplement Registration Data for PDP process

(SFRPDPR)

- Financial Aid data will be stored in the Supplement Financial Aid Data for PDP process (SFRPDPF)

Configuration for the report fields and valid values

Ellucian has leveraged the *Social Economic Identity Report* to store the configuration for these NSC-PDP reports and has provided the data for this configuration as seed data. For more information, review the *Banner General* content in the Ellucian Documentation site.

When NSC defines additional fields, Ellucian will add them to the configuration—by providing these new values as seed data scripts. If preferred, institutions can update their configurations on their own rather than wait for the scripts.

Page	Description
Social Economic Identity Report (GTVSEIR)	Defines the following reports: <ul style="list-style-type: none"> NSC_PDP_COHORT NSC_PDP_COURSE NSC_PDP_FINAID
Social Economic Identity Codes (GTVSEID)	Defines the fields that are used in the three reports; field names start with NSC
Social Economic Identity Code (GOASEID)	Defines valid field values Note: Free-form fields will not have an entry.
Social Economic Identity Report Template (GOASETP)	Defines the report fields on this page along with the specification of LOV or Text box

PDP Field Extract process (SFPPDPE)

The SFPPDPE process extracts and formats the NSC-PDP data for a group of students using a population selection or *pop sel* to define which students will be extracted.

Note: Please note the following items before using this process:

- For each student in the pop sel, the process will look for records in the appropriate report table.
 - Students in the pop sel but not in the report table(s) will not be included in the .csv file.
 - Students in the report table but not in the pop sel will not be included in the .csv file.
- The output files:
 - are named in the standard manner
 - will be available for download on GJIREVO
 - may include the following file types: .LIS file, .LOG, or .CSV with supplemental data
- Each .csv output file will have:
 - A header line showing the field names, comma-separated
 - Multiple data lines with the values comma-separated. Any missing data will be shown by consecutive commas. Missing data at the end of a line will also be shown by a trailing comma(s).
- For the cohort (student) and Financial Aid reports:
 - The header will consist of *Student ID* (note the space between the two words), *Term*, *Section ID* (note the space between the two words), and the description (from GTVSEID) for each field defined on the report (specified on GORSETP).
 - A data line will consist of *Student ID* (current SPRIDEN_ID), Term code, CRN, and the data value from the appropriate report table for the student and GTVSEID field

Note: The fields must be reported in the same order as the header labels and there may be one data line for each student.
- For the course registration report:
 - The header will consist of *Student ID* (note the space between the two words) and the The description (from GTVSEID) for each field defined on the report (specified on GORSETP).
 - Because you can record the data for a data line in multiple rows in the report

table, the process will need to collect the data rows into one output line. For the cohort report, we aggregate all the lines for a student (by pidm). For the courses report, we aggregate all the lines for a student and term and CRN. For the Fin Aid report, we aggregate all the lines for a student and aid year.

- A data line will consist of *Student ID* (current SPRIDEN_ID), the data value from the appropriate report table for the student and GTVSEID field

Note: The fields must be reported in the same order as the header labels and there will be one data line for each student.

- The process does not check to see if a student has an assigned NSC-PDP cohort code.

Parameter Name	Validation (If any)	Characteristics	Help text/additional comments
Application	None	<ul style="list-style-type: none"> • 30 characters • required • single value 	Application is Required to run with Population Selection
Selection	None	<ul style="list-style-type: none"> • 30 characters • required • single value 	Selection is Required to run with Population Selection
Creator ID	None	<ul style="list-style-type: none"> • 30 characters • required • single value 	Creator ID is Required to run with Population Selection
User ID	None	<ul style="list-style-type: none"> • 30 characters • required • single value 	User ID is Required to run with Population Selection

Parameter Name	Validation (If any)	Characteristics	Help text/additional comments
Report type	<ul style="list-style-type: none"> • 1 (Cohort) • 2 (Course) • 3 (FinAid) 	<ul style="list-style-type: none"> • 1 character • required • single value • no default 	Enter report type
Course term	STVTERM	<ul style="list-style-type: none"> • 6 characters • optional • single value • no default 	Enter term for report Note: Only needed for Course report.
Fin Aid Award Year	None	<ul style="list-style-type: none"> • 4 characters • optional • single value • no default 	Enter Financial Aid year for report Note: Only needed for Fin Aid report.

PDP Field Population Process (SFPPDPP)

Updated: June 28, 2023

Use the SFPPDPP process to do a mass update of the National Student Clearinghouse - Postsecondary Data Partnership (NSC-PDP) reporting tables for a set of students.

High-level statement of need

The National Student Clearinghouse – Postsecondary Data Partnership (NSC-PDP) process reports on students, student registrations, and student Financial Aid information.

Historically, *supplemental fields* have not been included in the data file sent for submission. While institutions can create the data manually, the process is time-consuming and error-prone. To improve this process and enable the NSC to add one or two fields annually, Ellucian now provides functionality so institutions to populate and include this supplemental data in the reports.

Specifically, this functionality allows institutions to:

- provide a batch update process to populate the data
- provide online administrative access to update these fields
- provide a batch extract process to supply the data to the NSC-PDP process

The following NSC-PDP reports may require supplemental data fields:

- Cohort Report: provides information about a student
- Course Report: provides information about the classes a student is registered for in a specified term
- Fin Aid Report: provides information about a student's financial aid status for the specified award year

Institutions can store the NSC-PDP report data for students in one of the following tables:

- Cohort data will be stored in the Supplement Student Data for PDP process (SFRPDPS)
- Registration data will be stored in the Supplement Registration Data for PDP process (SFRPDPR)
- Financial Aid data will be stored in the Supplement Financial Aid Data for PDP process (SFRPDPF)

Configuration for the report fields and valid values

Ellucian has leveraged the *Social Economic Identity Report* to store the configuration for these NSC-PDP reports and has provided the data for this configuration as seed data. For more information, review the *Banner General* content in the Ellucian Documentation site.

When NSC defines additional fields, Ellucian will add them to the configuration—by providing these new values as seed data scripts. If preferred, institutions can update their

configurations on their own rather than wait for the scripts.

Page	Description
Social Economic Identity Report (GTVSEIR)	Defines the following reports: <ul style="list-style-type: none"> • NSC_PDP_COHORT • NSC_PDP_COURSE • NSC_PDP_FINAID
Social Economic Identity Codes (GTVSEID)	Defines the fields that are used in the three reports; field names start with NSC
Social Economic Identity Code (GOASEID)	Defines valid field values Note: Free-form fields will not have an entry.
Social Economic Identity Report Template (GOASETP)	Defines the report fields on this page along with the specification of LOV or Text box

PDP Field Population process (SFPPDPP)

The SFPPDPP process does a mass update of NSC-PDP data for a group of students using a population selection or *pop sel* to define which students will be updated. The update is based on pairs of inputs:

- The first of a pair will be a field name
- The second of a pair will be a valid value for the field

Ellucian has provided twenty pairs of inputs.

Note: Please note the following items before using this process:

- For each field, the batch process will create a row if one doesn't exist or update the existing row
 - There is an input parameter that indicates **overwrite existing data: yes/no**.
 - If the data already exists and this parameter is **yes**, update the row.

- If the data already exists and this parameter is **no**, don't update the row.
- Each student in the pop sel will have the same values for the specified fields.
- Registration data comes from Banner Student Registration and not Academic History.
- Use the NSC-PDP Maintenance (SFAPDPM) page to update individual report values for a student.
- The process does not check to see if a student has an assigned NSC-PDP cohort code.
- The process will only validate an entered field value if it is enumerated.
 - These are the fields with a Field Type = **LOV** on GOASETP
 - The validation is done when the process begins running and not on the job submission page.
 - The process does not check any NSC-PDP maximum length restrictions.
- If an institution has to update more than twenty fields, they can run the process again using the same pop sel.
- The output files:
 - are named in the standard manner
 - will be available for download on GJIREVO
 - may include the following file types: .LIS file, .LOG, or .CSV

Parameter Name	Validation (If any)	Characteristics	Help text/additional comments
Application	None	<ul style="list-style-type: none"> • 30 characters • optional • single value 	Application is Required to run with Population Selection
Selection	None	<ul style="list-style-type: none"> • 30 characters 	Selection is Required to run with Population Selection

Parameter Name	Validation (If any)	Characteristics	Help text/additional comments
		<ul style="list-style-type: none"> • optional • single value 	
Creator ID	None	<ul style="list-style-type: none"> • 30 characters • optional • single value 	Creator ID is Required to run with Population Selection
User ID	None	<ul style="list-style-type: none"> • 30 characters • optional • single value 	User ID is Required to run with Population Selection
Audit/Update	A or U	<ul style="list-style-type: none"> • 1 character • required • single value • default is A 	Audit (A) or Update (U) mode
Create detail file	Y (yes) or N (no)	<ul style="list-style-type: none"> • 1 character • required • single value • default is N 	Create Detail Report (Y,N)
Overwriting existing data?	Y (yes) or N (no)	<ul style="list-style-type: none"> • 1 character • required 	Overwrite existing data? (Y/N)

Parameter Name	Validation (If any)	Characteristics	Help text/additional comments
		<ul style="list-style-type: none"> single value default is N 	
Report type	<ul style="list-style-type: none"> 1 (Cohort) 2 (Course) 3 (FinAid) 	<ul style="list-style-type: none"> 1 character required single value no default 	Enter report type
Course term	STVTERM	<ul style="list-style-type: none"> 6 characters optional single value no default 	Enter term for report Note: Only needed for Course report.
Course CRN	Numeric, multi-valued <ul style="list-style-type: none"> %: all of a student's sections for a term will be processed Otherwise, you can enter a discrete list of CRNs 	<ul style="list-style-type: none"> 5 characters optional multiple values no default 	Course Reference Number (CRN) Note: Only needed for Course report.
Active registrations only	Y (yes) or N (no)	<ul style="list-style-type: none"> 1 character 	Enter Y to process only current active registrations; enter N otherwise"

Parameter Name	Validation (If any)	Characteristics	Help text/additional comments
		<ul style="list-style-type: none"> • optional • single value • no default 	<p>Note: Only needed for Course report.</p> <p>Y means to only update the course report table for the student if the registered course's SFRSTCR_RSTS_CODE does have an N in the STVRSTS_WITHDRAW_IND column. N means to always update the course report table for the student/term/course.</p>
Fin Aid Award Year	No validation	<ul style="list-style-type: none"> • 4 characters • optional • single value • no default 	<p>Enter Financial Aid year for report</p> <p>Note: Only needed for Fin Aid report.</p>
NSC field 1	<from GORSETP table for this report>	<ul style="list-style-type: none"> • 30 characters • optional • single value • no default 	NSC PDP field 1
NSC value 1	<from GORSEID table for this field and report>	<ul style="list-style-type: none"> • 99 characters 	Value for NSC PDP field 1

Parameter Name	Validation (If any)	Characteristics	Help text/additional comments
		<ul style="list-style-type: none"> • optional • single value • no default 	
NSC fields 2-19	<from GORSETP table for this report>	<ul style="list-style-type: none"> • 30 characters • optional • single value • no default 	NSC PDP fields 2-19
NSC values 2-19	<from GORSEID table for this field and report>	<ul style="list-style-type: none"> • 99 characters • optional • single value • no default 	Values for NSC PDP fields 2-19
NSC field 20	<from GORSETP table for this report>	<ul style="list-style-type: none"> • 30 characters • optional • single value • no default 	NSC PDP field 20
NSC value 20	<from GORSEID table for this field and report>	<ul style="list-style-type: none"> • 99 characters • optional • single value • no default 	Value for NSC PDP field 20

Student Schedule Report (SFRSCHD)

Updated: August 27, 2020

This process generates the student schedule for the term. It can be requested online through the Student Course Registration Form (SFAREGS) or in batch through this process.

You may also print a student's schedule as part of the combined schedule/bill. See the *Banner Accounts Receivable Use* content for information on the Student Invoice/Billing Statement (TSRCBIL).

Note: If SFRSCHD is run directly from SFAREGS using sleep/wake processing, the open learning processing is not used.

Courses selected for printing in SFRSCHD are determined solely by the value of the **Print on Schedule** check box associated with course statuses on STVRSTS. Any course registration status codes (registered, dropped, withdrawn, etc.) where the **Print on Schedule** check box is checked will be printed.

- A student schedule will be printed if a registration term header record exists (SFBETRM), regardless of the student's enrollment status (STVESTS) or whether any course registration records exist. If no course registration records exist, the message `** NO ENROLLMENT RECORDS EXIST FOR STUDENT **` will be printed in the output.
- If a student has no course registration records, or if all of the existing course registration records for a student have course registration status codes that do not have the **Print on Schedule** check box checked on STVRSTS, then no schedule will be printed for the student if SFRSCHD is run with the ID Number parameter set to an individual student ID or set to COLLECTOR.
- A schedule will be printed for the student if all students are requested for a process term (the ID Number parameter is blank), or if the student is included in a population selection that is requested. In those cases, the message `* * NO ENROLLMENT RECORD EXISTS FOR STUDENT * *` will appear in the output.

The start and end dates are used to isolate all registration records in a range. For traditional courses (which are assigned to a part-of-term), the part-of-term start date associated with the section is used to determine inclusion. For open learning courses, the start date of the original SFRAREG record for the student is used.

Actual course dates for traditional sections are printed on the report as follows:

- The start date for a traditional section will print the `SSRMEET_START_DATE(s)` associated with the meeting time(s).
- The end date for a traditional section will print the `SSRMEET_END_DATE(s)` associated with the meeting time(s).
- If no meeting times are defined for a traditional section, the start date will print the `SSBSECT_PTRM_START_DATE`, and the end date will print the `SSBSECT_PTRM_END_DATE`. If those dates are `Null` on `SSBSECT`, the `SOBPTRM_START_DATE` and the `SOBPTRM_END_DATE` will be printed.

Actual course dates for open learning sections are printed on the report as follows:

- The start date for all open learning sections will print the `SFRAREG_START_DATE` from the "0" extension record.
- The end date for all open learning sections will print the `SFRAREG_COMPLETION_DATE` for the maximum extension records that exist.
- Dates associated with meeting time records, if they exist, are not printed for open learning courses.

If you need to isolate a portion of a term for processing, enter either a valid term or a wildcard (%) to search all terms. The wildcard feature is only permitted if start and end dates are also entered. In this instance, only registration records in a particular term matching the date range entered would be selected.

Term	Date Range	Results
Fall 1999		All registration records for the Fall 1999 term would be selected.
Fall 1999	01-SEP-1999 to 30-NOV-1999	All registration records with a registration start date between the date range (inclusive) for the Fall 1999 term would be selected.
%	01-SEP-1999 to 30-NOV-1999	All registration records with a registration start date between the date range

Term	Date Range	Results
		(inclusive), regardless of term, would be selected.

You can run SFRSCHD using Sleep/Wake Method One. Note that while the execution of processes from the command line is no longer supported, processes that run in sleep/wake, including SFRSCHD, are supported.

Refer to the *Banner General Technical Reference Manual* for information about the various components of sleep/wake processing. Sleep/Wake Method One requires that the `.dat` response file must be constructed in the order in which the parameters are prompted for when running SFRSCHD from the command line. This order is different than the order of the parameters displayed in job submission (GJAPCTL).

Refer to the topic *Setting Up Sleep/Wake Processes* in the *Registration* section in the *Banner Student Use* content to see a sample `.dat` file for SFRSCHD when using Sleep/Wake Method One.

SFRSCHD Output Notes

Updated: August 27, 2020

Output notes for SFRSCHD.

- If the report is run for a single term, and the open learning parameters are set to `N`, the report prints in the one line per course format, unless there are multiple meeting times/instructors.
- If the report is run for multiple terms, (and the Process Term parameter is set to `%`, which requires a date range), or if any of the open learning parameters are set to `Y`, a second line is generated. The course title prints below the detail line.
- If the ID Number parameter is set to `COLLECTOR`, term is irrelevant. A single term code or a term value of `%` can be entered, and the date range is ignored, if entered. As mentioned above, if the open learning parameters are set to `N`, the report prints in the one line per course format.
- Meeting type (GTVMTYP) prints on all reports, except on the one line per course format. This includes running the report for multiple terms and using the open learning parameters.

- If no meeting records (days, times, building, room) are defined for an open learning section, *N/A* is printed on the report output.
 - If meeting building and room information exists without start and end times, *TBD* is printed under the TIME heading.
 - If meeting time information exists without building or room information, *TBD* is printed under the BUILD and ROOM headings.
 - If meeting information exists without instructors, *STAFF* is printed under the INSTRUCTOR heading.
- If the **Print Long Section Title** parameter is set to *Y*, the title wraps in chunks of 40 characters (40, 40, 20).
 - The **CRSE** column in the process output has been extended to 20 characters to accommodate the full display of the Course Alias value.

Parameter Name	Required?	Description	Values
ID Number	No	To request a specific schedule, enter that person's ID number, enter a <code>Null</code> value to request all IDs, or enter the word <code>COLLECTOR</code> to process all students in the collector file.	
Process Term	Yes	Enter the term code representing the term for which schedules are to be printed, or enter <code>%</code> to process schedules for multiple terms. Term records are stored in the <code>SFRCBRQ</code> collector table.	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		You can print schedules for multiple terms using a single sleep/wake process by entering % in this parameter and entering COLLECTOR in the ID Number parameter.	
Start Range From Date	No	Enter the start date for which registration records are to be processed. The term is displayed on the report for the registration record for use with the registration start date information.	
Start Range To Date	No	Enter the end date for which registration records are to be processed.	
Schedule Type (% for all)	Yes	Enter the schedule type code or codes for the sections to be processed, or enter % for all. The default is %.	Schedule Type Code Validation Form (STVSCHD)

Parameter Name	Required?	Description	Values
		For example, you could select all sections with a schedule type of self-paced.	
Instructional Method (% for all)	No	<p>Enter the instructional method or methods for the sections to be processed, or enter % for all. The default is %.</p> <p>For example, you could select all sections with an instructional method of Web-based.</p>	Instructional Method Validation Form (GTVINSM)
Address Selection Date	No	Which address, effective on this date, do you want to print on the student schedules. Leave blank for today; enter in date format DD-MON-YYYY.	
Address Hierarchy	Yes	Enter the address type to be printed on the student schedules; multiple requests are permitted and must be entered in priority sequence.	Address Type Code Validation Form (STVATYP)

Parameter Name	Required?	Description	Values
		For example, 1MA 2PR will first print the mailing address, and if none is found, will print the permanent address. Enter each parameter, then hit Return for the next prompt. Returning with a null value will move you on to the next parameter.	
Printer	No	Enter the printer destination for schedules. This field is required when you are running this report for the collector file.	
Campus Processing Indicator	Yes	Enter Y to process specific campuses. Enter N to process all campuses.	Y - Print specific campuses N - Print all campuses
Campus	No	Enter the course campus for which the student schedules are to be produced. If the Campus Processing	Campus Code Validation Form (STVCAMP)

Parameter Name	Required?	Description	Values
		Indicator parameter is set to Y, then the Campus parameter is required.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		people who will be processed in the load from the selection identifier and application code entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
Run in Sleep/Wake Mode	No	Enter y to start sleep/wake cycling for this process and printer.	Y - Use sleep/wake processing N - Do not use sleep/wake processing
Sleep Interval	No	Enter the time in seconds to process pauses before resuming execution. The lowest enterable value is 1. The highest enterable value is 999999.	
Print Long Section Title	Yes	Enter y to print the long section title from the syllabus (SSRSYLN) or n to print the existing course title from the	Y - Print long section title N - Print existing course title

Parameter Name	Required?	Description	Values
		section (SSBSECT) or from SCBCRSE if the section title is null. The default is N.	
Print Schedule Type	Yes	<p>Enter Y to print the schedule type code for the section on the output or N to not print the code. The default is N.</p> <p>This parameter allows institutions using pre-printed forms to control the presentation of the data on the report.</p>	<p>Y - Print schedule type</p> <p>N - Do not print schedule type</p>
Print Instructional Method	Yes	<p>Enter Y to print the instructional method code for the section on the output or N to not print the code. The default is N.</p> <p>This parameter allows institutions using pre-printed forms to control the presentation of the data on the report.</p>	<p>Y - Print instructional method</p> <p>N - Do not print instructional method</p>
Print Reg Start/End Dates	Yes	Enter Y to print the registration start and end dates (the original registration	Y - Print registration start and end dates

Parameter Name	Required?	Description	Values
		start date and the most current expected completion date) for the section on the output or N to not print the dates. The default is N. This parameter allows institutions using pre-printed forms to control the presentation of the data on the report.	N - Do not print dates
Print Control Report	Yes	Enter Y to print a control report page or N to not print a control report page. The default is N.	Y - Print control page N - Do not print control page

Class Roster Report (SFRSLST)

Updated: August 27, 2020

This process produces a hard copy of the class roster which is used as a class list representing all students in a section who have a course registration status for the section with the following criteria.

- **Count in Enrollment** check box selected (set to Y)
- **Gradable Indicator** check box selected (set to Y)
- if you have a default grade on the Course Registration Status Code Validation Form (STVRSTS) with the Gradable Indicator check box selected (set to Y)
- the student is waitlisted (has a registration status with the **Waitlist Indicator** check

box selected on STVRSTS)

Waitlisted students are displayed separately from students who are actually enrolled.

When run with the Run Mode parameter set to **U** (Update), the names displayed online on SFASLST will be re-sequenced alphabetically. Students registering after the Class Roster is run will appear at the bottom of the list until the next time this process is run with the Run Mode parameter set to **U** (Update). When run with the Run Mode parameter set to **R** (Report), Class Roster reports can be produced during periods of heavy system usage without impacting performance, because this option does not update SFRSTCR.

The Class Roster is also used as the grade collecting and recording mechanism. Mid-term and final grades can be collected on the Class Roster and then must be entered into Banner through the Class Roster Form (SFASLST) to be rolled into academic history.

The start from and to dates are used to isolate all registration records in a range. For traditional courses (which are assigned to a part-of-term), the part-of-term start date associated with the section is used to determine inclusion. For open learning courses, the start date of the original SFRAREG record for the student is used.

If you need to isolate a portion of a term for processing, enter either a valid term or a wildcard (%) to search all terms. The wildcard feature is only permitted if start From and To dates are also entered. In this instance, only registration records in a particular term matching the date range entered would be selected. Also, if a specific part-of-term is entered, records meeting the date requirements are selected. A valid term must be entered to also have the associated part-of-term.

Term	Part-of-Term	Date Range	Results
Fall 2002			All registration records with a registration start date between the date range (inclusive) for the Fall 2002 term would be selected.
Fall 2002	1		All registration records for the Fall 2002 term for sections assigned a

Term	Part-of-Term	Date Range	Results
			part-of-term code of 1 would be selected.
Fall 2002	%	01-SEP-2002 to 30-NOV-2002	All registration records with a registration start date between the date range (inclusive), for the Fall 2002 term, would be selected.
%	1	01-SEP-2002 to 30-NOV-2002	Not permitted.
Fall 2002	1	01-SEP-2002 to 30-NOV-2002	All registration records for the Fall 2002 term for sections assigned a part-of-term code of 1 with a registration start date between the date range (inclusive) would be selected.
%	%	01-SEP-2002 to 30-NOV-2002	Not permitted.

Note: If no meeting records (days, times, building, room) are defined for an open learning section, *N/A* is printed on the report output.

Parameter Name	Required?	Description	Values
Report Title Override	No	The report title defaults to Class Roster, but it can be overridden by another title such as Final Grade Roster, for example. If a specific title is	

Parameter Name	Required?	Description	Values
		desirable, key the appropriate title, up to 30 characters.	
Term	Yes	Enter the term code representing the term for which rosters are to be produced.	Term Code Validation Form (STVTERM)
Part-of-Term	Yes	Enter the value representing the part of term for which rosters are to be produced (single entry) or % for all.	Part of Term Code Validation Form (STVPTRM)
Start Range From Date	No	<p>Enter the start date for which registration records are to be processed.</p> <p>For traditional registration records, this corresponds to a part-of-term start date housed on the additional registration record on SFRAREG.</p> <p>For open learning registration records, this corresponds to the student-selected start date housed on the additional registration record on SFRAREG.</p>	

Parameter Name	Required?	Description	Values
		The term is displayed for the registration record for use with the registration start date information.	
Start Range To Date	No	<p>Enter the end date for which registration records are to be processed.</p> <p>For traditional registration records, this corresponds to a part-of-term start date housed on the additional registration record on SFRAREG.</p> <p>For open learning registration records, this corresponds to the student-selected start date housed on the additional registration record on SFRAREG.</p>	
CRN	Yes	Enter the CRN number of the section for which a roster is to be produced (single requests only); enter % for all sections for the term.	

Parameter Name	Required?	Description	Values
No Grade Report Option	Yes	If a Y is entered, a class roster will be printed only for the CRNs that have missing grades. If N is entered, all CRNs are printed.	Y - Print roster for CRNs with missing grades N - Print all CRNs
Sort Option	Yes	Enter I to print rosters in instructor name order, or C to print rosters in college, division, department order.	I - Instructor name order C - College, Division, Department order
Campus	Yes	Enter the campus for which the class roster is to be printed, or enter % to select all campuses.	Campus Code Validation Form (STVCAMP).
Schedule Type (% for all)	Yes	Enter the schedule type code or codes for the sections to be processed, or enter % for all. The default is %. For example, you could select all sections with a schedule type of self-paced.	Schedule Type Code Validation Form (STVSCHD)
Instructional Method (% for all)	No	Enter the instructional method or methods for the sections to be processed, or enter % for all. The default is %. For example, you could select all sections with an	Instructional Method Validation Form (GTVINSM)

Parameter Name	Required?	Description	Values
		instructional method of Web-based.	
Registration Codes (% for all)	Yes	<p>Enter the registration code or codes to be processed, or enter % for all.</p> <p>For example, if the report should include students with a status of RE and waitlisted students, you would use this parameter. It is also possible to run this report for all dropped or withdrawn students or for any specialty status codes defined at your institution.</p>	Course Registration Status Code Validation Form (STVRSTS)
Degree Status Award Indicator	Yes	Enter the degree status for which the class roster is to be printed. Valid values are P for Pending, A for Awarded, or % for All.	P - Pending A - Awarded % - All
Combine Cross-listed Sections	Yes	This parameter allows you to specify if all cross-listed courses should display on a single roster. Enter Y to print combined rosters of cross-listed sections. Enter	Y - Combined cross-lists N - Individual sections

Parameter Name	Required?	Description	Values
		N to individually print each section belonging to a cross list.	
Print Student Addresses	Yes	Enter A to print the student's address on the class roster. Enter P to print the student's address and the primary phone number associated with the address on the class roster. Enter N to print neither the student's address nor telephone number on the class roster.	A - Address P - Address and primary phone N - Neither
Address Selection Date	No	Enter the effective date for the address to be printed on the class roster for address selection. Enter the date in DD-MON-YYYY format. If left blank, the system date will be the default.	
Address Priority and Type(s)	No	Enter the address priority and type to be printed on the class roster. Multiple requests are permitted and must be entered in priority	Address Type Code Validation Form (STVATYP)

Parameter Name	Required?	Description	Values
		<p>sequence.</p> <p>For example, 1MA 2PR will first print the mailing address, and if none is found, will print the permanent address. Enter each parameter, then hit Return for the next prompt. Returning with a null value will move you to the next parameter.</p>	
Primary Instructors Only	No	<p>Enter Y to produce a single class roster listing the names of all instructors. Enter N or a null value to produce a class roster for each of the instructors who is assigned to teach the class. An N will also print rosters with no instructors assigned. This will produce multiple copies of the class roster. Instructors will print in alphabetical order.</p> <p>If no instructors are associated with a course, and a Y is</p>	<p>Y - Single class roster of instructors</p> <p>N or Null - Roster of instructors assigned to teach class and roster of classes when no instructors assigned</p>

Parameter Name	Required?	Description	Values
		entered, you will not receive a roster.	
Print Long Section Title	Yes	Enter Y to print the long section title from the syllabus (SSRSYLN) or N to print the existing course title from the section (SSBSECT) or from SCBCRSE if the section title is null. The default is N.	Y - Print long section title N - Print existing course title
Run Mode	Yes	Enter U to produce a Class Roster report and to update the class sort key for the CRN on SFRSTCR or R to create a Class Roster report that does not update SFRSTCR. The default is U.	U - Create roster and update SFRSTCR R - Create roster but do not update SFRSTCR

Enrollment Verification Report (SFRENRL)

Updated: August 27, 2020

This process produces the enrollment verification reports which were processed using the Enrollment Verification Request Form (SFARQST) or selected using the population selection parameters.

You can specify the number of copies of the enrollment verification that are to be printed on SFARQST. Term, registration date, or academic year information from SFARQST is used to determine the term information that is included in the report.

The report processes information based on terms that are part of student centric periods. Enrollment dates, attendance information, enrollment history, and course summary information are printed as student centric period data.

If an academic year is entered in SFARQST, the enrollment verification process examines the terms in the academic year specified in the request to find the earliest term record for the learner in which any records exist as follows, and begins printing the terms for the report commencing with that term and including only the terms within that academic year:

- SGBSTDN - general student
- SFBETRM - student registration
- SHRTCKN - institutional term course maintenance

If no such data exists within the specified academic year, then no enrollment verification report will be printed.

If no academic year is entered in SFARQST, the enrollment verification will be produced only for the term entered in the Key Block, which will be the term used to process the request.

Parameter Name	Required?	Description	Values
Student ID	Yes	To request that the verification on a specific student be processed, enter that person's ID number, or enter % to request all IDs which are in the collector file.	
Enrollment Request Type	No	Enter the enrollment request type for which the verification is to be processed. If all types are to be processed, enter a Null value.	Enrollment Verification Type Code Validation Form (STVEPRT)
Address Type	Yes	Enter the address	Address Type Code

Parameter Name	Required?	Description	Values
		type for which the verification is to be processed.	Validation Form (STVATYP)
Select Credit Type to Print	Yes	Enter the credit hours type, (E) Earned or (A) Attempted, to be printed on the report.	E - Print earned hours A - Print attempted hours
Print Enrollment Request Type	No	Enter Y to have the enrollment request type printed on the report Enter a Null value or N to prevent the enrollment request type from printing.	Y - Print enrollment request type N - Do not print enrollment request type
Printer	No	Enter the printer destination for the enrollment verifications.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		<p>area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
Time Status Calc Credit Type	Yes	Enter the credit hours type (E) Earned or (A) Attempted, to be used for the enrollment history time status calculation.	<p>E - Print earned hours</p> <p>A - Print attempted hours</p>
Print Birth Date	Yes	Enter Y to print the student's birth date	Y - Print birth date

Parameter Name	Required?	Description	Values
		<p>or N to not print the birth date.</p> <p>The default is N.</p> <p>This parameter allows you to keep this information confidential, unless the student gives you permission to distribute it.</p>	N - Do not print birth date
Print Long Section Title	Yes	<p>Enter Y to print the long section title from the syllabus (SSRSYLN) or N to print the existing course title from the section (SSBSECT) or from SCBCRSE if the section title is null.</p> <p>The default is N.</p>	<p>Y - Print long section title</p> <p>N - Print existing course title</p>
Print Reg Start/End Dates	Yes	<p>Enter Y to print the registration start and end dates (the original registration start date and the most current expected completion date) for the student or N to not print the dates.</p>	<p>Y - Print registration start/end dates</p> <p>N - Do not print registration start/end dates</p>

Parameter Name	Required?	Description	Values
		The default is N.	
Web Self-Service Options	No	Enter the Web self-service option codes to be used to process the request.	Web Self Service Options Validation Form (STVWSSO)
Web Payment Options	No	Enter the Web payment option codes to be used to process the request.	Web Payment Options Validation Form (STVWPYO)
Use Request Cutoff Term	Yes	Enter Y to request that a cutoff term be used or N to not request that a cutoff term be used. The default is N.	Y - Use cutoff term N - Do not use cutoff term
Request Cutoff Term	No	When the Use Request Cutoff Term parameter is set to Y, enter the term to be used as the cutoff term for processing. If the Use Request Cutoff Term parameter is set to Y, and a cutoff term is specified, only learners with registration terms (or terms where academic year is specified) that are less than the	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		<p>specified cutoff term will be printed.</p> <p>For example, when a registration drop or add has been completed, you can redefine the cutoff term, or you can set the Use Request Cutoff Term parameter to Y, and remove the term from the Request Cutoff Term parameter.</p>	
Process by Student Period	Yes	Enter Y to process enrollment by student centric periods or N to not process enrollment by student centric periods. The default is N.	<p>Y - Use student centric periods</p> <p>N - Do not use student centric periods</p>

Enrollment Verification Request Purge Process (SFPENRL)

Updated: August 27, 2020

This process purges the enrollment verification requests which were previously requested.

Parameter Name	Required?	Description	Values
Date requested	Yes	Enter the date for	

Parameter Name	Required?	Description	Values
		which the enrollment verification purge is to take place.	
Request Type	No	Enter the enrollment request type for which the purge is to be processed.	Enrollment Verification Type Code Validation Form (STVEPRT)
Run Mode	Yes	Enter an A to indicate that the process is to be run in Audit mode. Running in Audit mode produces an audit report without updating the database. Enter a U to indicate that the process is to be run in Update mode. Running in Update mode removes the information from the database and produces the report.	A - Audit mode U - Update mode

Student Enrollment Status Update Process (SFPESTU)

Updated: December 14, 2023

The SFPESTU process updates the enrollment status and date when a study path does not exist for students. If study path records exist for students, the process updates the status and date for the enrollment and the attributed study path enrollment.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term code to be updated for the enrollment status	Term Code Validation Page (STVTERM)

Parameter Name	Required?	Description	Values
		and date.	
Current Enrollment Status Code	Yes	Enter the current enrollment status code.	Enrollment Status Code Validation (STVESTS)
New Enrollment Status Code	Yes	<p>Enter the new enrollment status code to update records.</p> <p>The New Enrollment Status parameter accepts only the enrollment status codes for which the Affect Course flag is not enabled (STVESTS_EFF_CRSE_STAT should be N). If the Affect Course flag is Y, an error displays on the GJAPCTL page.</p>	Enrollment Status Code Validation (STVESTS)
Last date of attendance	Yes	<p>When updating to a withdraw enrollment state, the process uses the values you enter. The values are:</p> <p>Y - Enter Y to update the maximum date in the SFRSTCR_LAST_ATTEND column for the student.</p>	

Parameter Name	Required?	Description	Values
		N - Enter N to update the maximum date in the SFRSTCR_RSTS_DATE column for the student	
Perform Fee Processing	Yes	Process fees in accordance with the specified value.	
Application	No	Enter the application to run with Population Selection.	Application Inquiry (GLIAPPL)
Selection ID	No	Enter the Selection ID to run with Population Selection.	Population Selection Inquiry (GLISLCT)
Creator ID	No	Enter the Creator ID to run with Population Selection.	
User ID	No	Enter the User ID to run with Population Selection.	
Run Mode	Yes	Enter A for Audit Mode, or U for Update Mode.	A - Audit mode (default) U - Update mode

Job Process Logic

Depending on the input parameters, the SFPESTU process identifies the students and checks for a few validations to verify if the enrollment status and date can be updated for the records. The process uses the STVESTS_THIRD_PARTY_WD_IND flag value to determine if a record is in the enrolled or withdrawn status.

- If the STVESTS_THIRD_PARTY_WD_IND = Y for any STVESTS enrollment status

code, the process considers the status to imply the withdrawn status.

- If the `STVESTS_THIRD_PARTY_WD_IND = N` for any `STVESTS` enrollment status code, the process considers the status to imply the enrolled status.

The process is study path compliant and will update the study path record wherever it exists with the new enrollment status. If the student's study path enrollment status in the `SFRENSP` table matches the `SFBETRM` enrollment status, only then is the study path record updated, or else the status is not updated. However, the process updates the parent `SFBETRM` enrollment status.

If you want to update the student records with similar enrollment statuses (that is, if the `STVESTS_THIRD_PARTY_WD_IND` is the same for both the current and future statuses), the process does not verify if the CRNs exist, and if there are CRNs, it will not verify the CRN status. The process updates the enrollment status and study path enrollment status only, and the enrollment status date will not change.

When you change to a different status, where, `STVESTS_THIRD_PARTY_WD_IND` is different for the current and to-be statuses, the process uses different validations to fulfill the state transition.

When you want to update from a withdrawn status to an enrolled status, the process will first validate if there are any active CRNs for the students (any CRNs that are in the registered status and not dropped/withdrawn for a pidm). When a student has any active CRNs, which means that not all CRNs are in the dropped or withdrawn status and at least one is active/in the registered status, the process will update the enrollment status with the enrollment status code you provided and the date of the earliest registration for all such records. The earliest registration date is derived when the minimum `SFRSTCR_RSTS_DATE` from the `SFRSTCR` table for a CRN that is in the Registered status for the student is updated as the enrollment status date.

An exception displays for the student ID in the generated `.lis` file if there are zero CRNs, or if all CRNs are in the dropped or withdrawn status. In this case, the process does not make any updates for the student.


When you want to update from an enrolled status to a withdrawn state, the process should first determine whether all the CRNs imply the dropped or withdrawn status before updating the status and date for any student. The user-supplied parameter **Last date of attendance** should determine the status date to be updated. When there are active CRNs for a student record, the process does not update the student record. Instead, the process displays an error in the `.lis` file.

- If the **Last date of attendance** value is set to \mathbb{Y} , the process determines whether the SFRSTCR_LAST_ATTEND exists for a given CRN. If it does, the SFRSTCR_LAST_ATTEND is considered for a CRN; if not, the SFRSTCR_RSTS_DATE date is considered for the CRN. The process will then calculate the maximum date from all the CRN dates and populate the enrollment status dates in the enrollment record and the enrollment study path records as appropriate.
- If the **Last date of attendance** value is set to \mathbb{N} , the process considers SFRSTCR_RSTS_DATE for all CRNs. The process will then calculate the maximum date from all CRN RSTS dates and populate the enrollment status dates in the enrollment record and the enrollment study path records as appropriate.

When the process is run with the **Fee Processing Parameter** set to \mathbb{N} , the students are added to the collector table (SFRBTCH). If the **Fee Processing Parameter** is set to \mathbb{N} , the fee is processed.

Note: When the records are created in the collector table, you must run the SFRFASC process to trigger the batch fee processing.

The population selection works only if all the population selection parameters are entered correctly. If one parameter is incorrect, the population criterion will fail and an error displays in the .lis file.

To download the *SFPESTU Process Flowchart*, click **Attachments**  on this page, then select the SFPESTU_process_flowchart.pdf file.

Registration Purge Process (SFPREGS)

Updated: August 27, 2020

This process, sorted by student name, lists registrations, and optionally time status history records, which are purged.

A total number of students processed and a total number of registrations and class roster records deleted is also provided on the report. The process may be run in either Audit mode for review, or Update mode to purge eligible records. When the SFRSTCR records are purged, the associated SFRAREG records are also deleted. This prevents the creation of orphan records.

Note: The purge process will bypass Elevate registration records based on the integration

partner code. When the `SSBSECT_INTG_CDE` field on `SSASECT` is set to `ELEV8`, the record is not considered by the purge.

Registration and time status history records will not be purged if an outstanding fee assessment record exists in the Batch Fee Assessment Collector Table (`SFRBTCH`) for the student for the purge term. If a student's information cannot be purged because fee assessment is pending, the message *OUTSTANDING FEE ASSESSMENT PREVENTS DELETE* will be printed in the report output. Run the Batch Fee Assessment Process (`SFRFASC`) with the Batch Type parameter set to `C` (Collector) to process outstanding registration assessments.

Registration and time status history records will be deleted in Update mode even if some or all of the following conditions exist:

- a gradable section has not been graded
- a non-gradable section has a grade
- the student has a course with a non-gradable status
- a grade has not been rolled to history
- the registration fee has not been accepted

The process should be run in Audit mode before Update, to review these errors and take any necessary action before purging the records.

Note: Be aware that all results of the student's coursework will be deleted during the purge, and if no paper copy of this information is kept, this information will be lost.

Note: If registration records are purged, but time status history records are not purged, time status records will no longer be accessible to display online in the Student Course Registration Form (`SFAREGS`).

Component and sub-component records should only be purged for those registration records that are eligible to be purged as a result of existing logic (not graded and not rolled to academic history). This processing prevents the existence of orphaned component and sub-component records. Component records should not be purged if it is required that sub-components records be kept.

- The Purge Component Records parameter is required and can be set to `Y` to purge component records or `N` to not purge component records. The default value is `N`.

- The Purge Sub-Component Records parameter is required and can be set to Y to purge sub-component records or N to not purge sub-component records. The default value is N.
- When both parameters are set to Y, component and sub-component records are purged. Messages are displayed on the report for the student (*Component Information* and *Sub-Component Information*), and the number of records purged for components or sub-components.
- When both parameters are set to N, neither component nor sub-component records are purged. A message is displayed on the report for the student: *NO COMPONENT/ SUB-COMPONENT RECORDS PURGED*.
- When the Purge Component Records parameter is Y and the Purge Sub-Component Records parameter is N, component records are purged. A message is displayed on the report for the student (*Component Information*), and the number of records purged for components.
- When the Purge Component Records parameter is N and the Purge Sub-Component Records parameter is Y, sub-component records are purged. A message is displayed on the report for the student (*Sub-Component Information*), and the number of records purged for sub-components.

The 'start from' and 'to' dates are used to isolate all registration records in a range. For traditional courses (which are assigned to a part-of-term), the part-of-term start date associated with the section is used to determine inclusion. For open learning courses, the start date of the original SFRAREG record for the student is used.

If you need to isolate a portion of a term for processing, enter either a valid term or a wildcard (*) to search all terms. The wildcard feature is only permitted if start from and to dates are also entered. In this instance, only registration records in a particular term matching the date range entered would be purged.

Term	Date Range	Results
Fall 1999		All registration records for the Fall 1999 term would be purged.
Fall 1999	01-SEP-1999 to 30-NOV-1999	All registration records with a registration start date between the date range (inclusive) for the Fall 1999

Term	Date Range	Results
		term would be purged.
%	01-SEP-1999 to 30-NOV-1999	All registration records with a registration start date between the date range (inclusive), regardless of term, would be purged.

Parameter Name	Required?	Description	Values
Purge Term	Yes	Enter the term code which is to be purged of registration information.	Term Code Validation Form (STVTERM)
Start Range From Date	Yes	Enter the start date for which registration records are to be purged.	
Start Range To Date	Yes	Enter the end date for which registration records are to be purged.	
Report Type	No	Enter the type of purge to be processed. Either students with errors will be purged, or all students will be purged.	
Run Mode	Yes	Enter an A to indicate that the process is to be run in Audit mode, which purges no records. Enter a U to run in	A - Audit mode U - Update mode

Parameter Name	Required?	Description	Values
		Update mode, which purges the registration data.	
Purge Time Status History	Yes	<p>Enter Y to purge time status history records.</p> <p>Enter N to bypass the purge of time status history records.</p>	<p>Y - Purge time status history records</p> <p>N - Bypass purge</p>
Purge Component Records	Yes	<p>Enter Y to purge component records.</p> <p>Enter N to bypass the purge of component records.</p> <p>The default value is N.</p>	<p>Y - Purge component records</p> <p>N - Bypass purge</p>
Purge Sub-Component Records	Yes	<p>Enter Y to purge sub-component records.</p> <p>Enter N to bypass the purge of sub-component records.</p> <p>The default value is N.</p>	<p>Y - Purge sub-component records</p> <p>N - Bypass purge</p>
Purge Audit Records	Yes	Enter Y to purge registration audit trail records	<p>Y - Purge registration audit trail records</p> <p>N - Bypass purge</p>

Parameter Name	Required?	Description	Values
		Enter N to not purge the records. The default is N.	

Purge Enrollment Records Process (SFPREN)

Updated: December 14, 2023

The Purge Enrollment Records Process allows you to delete the enrollment information records (SFBETRM) in the absence of registration records, and helps correctly report students for enrollment reporting through National Student Clearinghouse.

SFPREN allows you to do the following:

- Use multiple population selection parameters such as Application, Selection ID, Creator ID and User ID to filter for the predefined population selection.
- Use Enrollment Status Code along with the population selection parameters to filter the Student Enrollment Records.
- Enter multiple rows for Enrollment Status Code to fetch data on multiple codes
- Run the process in Audit or Update mode.

Parameter Name	Required?	Description	Values
Purge Term	Yes	Enter the term code which is to be purged of registration information.	Term Code Validation Form (STVTERM)
Enrollment Status Code	No	Enter the enrollment status code of purge to be processed.	Enrollment Status Code Validation (STVESTS)
Purge Accepted records	Yes	Enter Y to purge the N,C,Y records or enter N to purge the	Y - Yes

Parameter Name	Required?	Description	Values
		<p>C, N records and back out charges.</p> <p>If the parameter is set to N, then the process deletes the SFBETRM and SFRENSP enrollment records for the term, only if the student record does not have any registration data.</p> <p>If the parameter is set to Y, then the process purges the SFBETRM and SFRENSP records.</p> <p>By default the parameter is set to N.</p>	N - No
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be</p>	Application Inquiry (GLIAPPL)

Parameter Name	Required?	Description	Values
		processed in the load from the selection identifier and application code entered.	
Selection ID	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry (GLISLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry (GLISLCT)
Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	Creator ID is optional to run with the population selection.
User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or	User ID is optional to run with the population selection.

Parameter Name	Required?	Description	Values
		none of the population selection parameters must be entered.	
Run Mode	Yes	Enter A to run in Audit mode and print an audit report. Enter U to update the database records. The default is A .	A - Audit mode (default) U - Update mode

View the SFPREN process reports

Updated: January 11, 2021


You can run the SFPREN process to generate and view the enrollment status, number of students selected, and number of potential registration enrollment records deleted.

Procedure

1. Access the **Process Submission Controls (GJAPCTL)** page.
2. Provide parameter values for the fields as given in the table:
3. Click **SAVE**.

Result: After the SFPREN process runs, it generates a unique log file.

4. To review the log file, perform the following steps:

- a. From the top panel, click the Related icon .
- b. Select **Review Output [GJIREVO]**.

Result: This opens the **Saved Output Review (GJIREVO)** page.

- c. Populate the required fields and click **Go**.
- d. Review the `.log` and `.lis` files to see the processed data and verify the

exceptions if any.

Figure 1: Sample Report

January 04, 2021 7:05:28 AM		Ellucian University- 1 Purge Enrollment Records	SFPRENR Page 1
** REPORT CONTROL INFORMATION **			

PROGRAM NAME: SFPREN			
PROGRAM VERSION: 8.21			
Report Begin Date/Time: January 04, 2021 7:05:28 AM			

JOB PARAMETERS			

PURGE TERM: 290030			
ENROLLMENT STATUS CODE: EL			
APPLICATION:			
SELECTION ID:			
CREATOR ID:			
USER ID:			
RUN MODE: A			

STUDENT ID	NAME	ENROLLMENT STATUS	

VR1EST001	Testing, VR1 Registration Enrollment Information to be DELETED	EL	

NUMBER OF STUDENTS SELECTED: 1			
STUDENTS WITH ERRORS: 0			
NUMBER OF POTENTIAL REGISTRATION ENROLLMENT RECORDS DELETED: 1			

Report End Date/Time: January 04, 2021 7:05:29 AM			

Waitlist Enrollment Purge (SFPWAIT)

Updated: August 27, 2020

This process removes the waitlist enrollment information for those students who could not be placed in the class section. It also adjusts the waitlist counts on the Schedule Form (SSASECT).

It should be run after the end of the drop/add period after *all* enrollment data has been processed for the term. A report, sorted by student name, will list the waitlist enrollments which are purged. A total number of students processed and a total number of enrollments deleted is also provided on the report. Multiple parts-of-term may be purged. Expired notifications can also be purged for the term or part-of-term and registration status.

The process uses the course statuses defined on the Course Registration Status Code Validation Form (STVRSTS). Only those course statuses with the **Waitlist Indicator** check box selected (set to Y) and the **Count in Enrollment** and **Count in Assessment** check

boxes not selected (set to N) will be acceptable for processing.

Parameter Name	Required?	Description	Values
Purge Term	Yes	Enter the term code for which waitlist enrollments are to be purged.	Term Code Validation Form (STVTERM)
Part-of-Term	Yes	Enter the part of term code for which the waitlist enrollments are to be purged. Multiple parts of term codes can be entered or a % can be used to indicate that all parts of term within the purge term are to be processed. The default is %.	Part of Term Code Validation Form (STVPTRM)
Status	Yes	Enter the waitlist status codes to be deleted. Only those statuses with the Waitlist Indicator checked (set to Y) and the Count in Enrollment and Count in Assessment checkboxes unchecked (set to N) on the Course Registration Status Code Validation Form (STVRSTS) are available for processing. WL is the default. Multiple	Course Registration Status Code Validation Form (STVRSTS)

Parameter Name	Required?	Description	Values
		waitlist statuses may be entered. % is not a valid selection parameter.	
Audit or Update Option	Yes	Enter an A to indicate that the process is to be run in Audit mode. Running in Audit mode produces an audit report without updating the database. Enter a U to indicate that the process is to be run in Update mode. Running in Update mode removes the information from the database and produces the report.	A - Audit mode U - Update mode
Purge All Expired Notifications	Yes	Enter Y to purge all expired waitlist notifications for the term or part-of-term or N to not purge expired notifications. The default is N. The Audit or Update Option parameter must set to U (Update) to use this option.	Y - Purge all expired notifications N - Do not purge expired notifications

Course Request Load Process (SFPBLCK)

Updated: August 27, 2020

This process defaults the CRNs of a student's block code to the selected student's record on the Student Course Request Form (SFACREQ) for the effective term and tracks student populations by block schedule codes for effective and report terms.

Parameter Name	Required?	Description	Values
Selection Identifier	Yes	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	Yes	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		people who will be processed in the load from the selection identifier and application code entered.	
Creator ID	Yes	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
Report Term	Yes	Enter the code representing the term for which the report is to be run. This is the term that will be used in headers and student selection.	Term Code Validation Form (STVTERM)
Effective Term	Yes	Enter the effective term of the general student record to be scanned to a matching block code.	Term Code Validation Form (STVTERM)
Block Schedule Code	Yes	Enter the block schedule code to be used to create sections as input to batch scheduling.	Block Schedule Code Validation Form (STVBLCK)

Unsatisfied Links Report (SFRLINK)

Updated: August 27, 2020

This report produces a list of students who have unsatisfied or missing section links for a term.

This report will find sections with missing links only if links were not checked at the time of registration, when `No Check` is selected for the **Links** radio group on the Registration Error Checking window of the Term Control Form (SOATERM).

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term code representing the term for which the unsatisfied linking is to be checked.	Term Code Validation Form (STVTERM)

Clearinghouse Extract Report (SFRNSLC)

Updated: February 15, 2024

This report extracts student enrollment information for the purpose of reporting to the National Student Clearinghouse (NSC).

The report should first be run in the Report of Missing/Invalid Data mode, and then run in either the EDI or EDI.Smart mode to create the extract file. All errors must be corrected, and the Report of Missing/Invalid Data may be run as many times as needed, to diagnose and resolve problems with the data.

When all data problems have been resolved, the message `No invalid or missing student data found for the <term code> term.` will print on the report output. Some informational messages may appear on the report output, when all missing data or data that is not valid, has been corrected or resolved. Only institutions that have licensed EDI.Smart and have made arrangements with the Clearinghouse to transmit the extract file with EDI.Smart should select that Run mode option.

SFRNSLC is run by term using the Process Term parameter. When SFRNSLC is run with the Process by Student Period parameter set to `Y`, the process checks the rules on

SOASCPT to determine which student centric period includes the value entered in the Process Term parameter as the last term. The data comes from the SFASTSR and SFASCPR forms. All term codes that are part of the student centric period are considered, as is the order in which the terms fall within the student centric period. When SFRNSLC is run for a single term, the data comes from the SFATMST form.

The report uses the **Third Party Withdrawal Indicator** on STVESTS to determine students who have withdrawn. When the **Third Party Withdrawal Indicator** is selected for the student's enrollment status code, the student will be reported as a withdrawn student to the NSLDS through the NSLDS SSCR Process (SFRSSCR) or the NSC through the Clearinghouse Extract Report (SFRNSLC). When the indicator is not selected, the SFRNSLC report will not consider the student as withdrawn and will report the last time status for the student.

Students who begin a term in a degree seeking program and change to a non-degree seeking program mid-term will be reported as withdrawn from the degree seeking program in the term for which the change was made. During the term in which the change from degree to non-degree seeking is made, the student will be reported with the **Program Indicator** set to *x*, the program level information for the degree program will be reported as withdrawn and include the withdrawal date. Additionally, no program information will be sent for the non-degree seeking program. After the term in which the change to a non-degree seeking program was made has ended, the student will be reported with the **Program Indicator** set to *N* and no program level information will be reported for the student. Campus level information will continue to be reported.

The report uses the **Third Party Report Indicator** on STVLEAV to select the leave of absence codes for the student. When the indicator is checked, the report will select leave of absence codes from the general student record to report the leaves to third parties.

The Create Summary parameter is used to produce a summary report/overview of the data to be transmitted to the NSC. This summary can be used to easily view student information such as:

- names
- Banner IDs
- SSNs
- dates of birth
- enrollment statuses

- term start and end dates
- graduation dates

This file is created in addition to the pipe-delimited files, and the missing data report or data report that is not valid, that are produced by SFRNSLC.

The files created by SFRNSLC are handled as follows:

- When SFRNSLC is run through job submission (GJAPCTL), three files are created and stored in the job submission directory:
 - `sfrnslc_oneup#.log`
 - `sfrnslc_oneup#.lis`
 - `sfrnslc_oneup#.txt`
- The `sfrnslc_oneup#.log` and `sfrnslc_oneup#.lis` files are viewable on the GJIREVO form.
- The `sfrnslc_oneup#.txt` file can be found in the job submission directory.

When the Run Mode parameter is set to 1 (Report of Missing/Invalid Data), no output is created for the pipe-delimited data file (`.txt`). Only the error report (`.lis`) is created with a control page and a `.log` file.

When the Run Mode parameter is set to 2 (EDI TS190) or 3 (EDI.Smart TS190), and the Create Summary Report parameter is set to Y, (create a summary report for Run Modes 2 (EDI TS190) and 3 (EDI.Smart TS190)), the summary report is created (`.lis`) with a control page. The pipe-delimited file is created (`.txt`), and a `.log` file is created.

When the Run Mode parameter is set to 2 (EDI TS190) or 3 (EDI.Smart TS190), and the Create Summary Report parameter is set to N, (do not create a summary report for Run Modes 2 (EDI TS190) and 3 (EDI.Smart TS190)), the summary report is created (`.lis`) with the message: *Summary Report Not Requested*, and a control page is printed. The pipe-delimited file is created (`.txt`), and a `.log` file is created.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the registration enrollment term for the report/extract.	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
Student Attributes to Exclude	No	<p>Enter the student attributes that will identify enrolled (registered) students for the term who should not be included in reporting to the Clearinghouse.</p> <p>If specific students who have registration term header records for the term of the report should not be included in the extract, a specific student attribute (Student Attribute Validation Form (STVATTS)) should be assigned to those students on the Additional Student Information Form (SGASADD).</p> <p>The Clearinghouse reporting term should fall between the effective term start and end range for the attribute.</p>	Student Attribute Validation Form (STVATTS)
Report Flag	Yes	<p>Enter Y to select a standard report.</p> <p>Enter N to select a non-standard report.</p>	<p>Y - Standard report</p> <p>N - Non-standard report</p>

Parameter Name	Required?	Description	Values
		Non-standard reports are submitted only for specific occasions, such as a summer term or a graduation report.	
Address Hierarchy	Yes	Enter the address types for reporting address information for enrolled (registered) students.	Address Type Code Validation Form (STVATYP)
Report Date	Yes	<p>Enter the certification date for the report/extract. This is the date that will be used to determine the enrollment status for registered students to be reported to the Clearinghouse.</p> <p>This date is used to find each student's time status on the certification date by selecting the maximum time status record less than or equal to the report date. Hours and minutes are stored with this date. If the current date</p>	

Parameter Name	Required?	Description	Values
		default is overridden with a prior date, the current hours and minutes will be appended to the date. This date is also used in subsequent reports for the same term as the basis of determining whether a student's enrollment status has changed to a lower status from the last report submitted.	
Run Mode	Yes	<p>Enter the appropriate run mode. Enter:</p> <ul style="list-style-type: none"> • 1 for Report of Missing/Invalid Data • 2 for EDI TS190 output • 3 for EDI.Smart TS190 output <p>Run mode 1 must be selected first, when preparing to report to the Clearinghouse and to print a report of missing data or</p>	<p>1 - Report of Missing/Invalid Data</p> <p>2 - EDI TS190</p> <p>3 - EDI.Smart TS190</p>

Parameter Name	Required?	Description	Values
		<p>data that is not valid. After correcting all missing data or data that is not valid, select either Run mode 2 or 3 to produce the extract file that is submitted to the Clearinghouse.</p> <p>Only institutions that have licensed EDI.Smart and have made arrangements directly with the Clearinghouse to transmit an EDI.Smart file should select Run mode 3.</p>	
Graduate Level Code	No	Enter the code for graduate level courses. For example, GR. Multiple codes may be entered.	Level Code Validation Form (STVLEVL)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the	

Parameter Name	Required?	Description	Values
		ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Effective Withdrawal Date	Yes	Enter Y to select the effective withdrawal date from the student withdrawal record (SFRWDRL_EFF_WDR L_DATE) if one exists for term, otherwise the date from the enrollment record (SFBETRM_ESTS_DATE) will be used. Enter N to select the date from the enrollment record (SFBETRM_ESTS_DATE). The default is N.	Y - Use date from SFRWDRL N - Use date from SFBETRM
Branch Code	No	Enter the two digit numeric branch code to be associated with the header record and individual records when transmitted in the file to third party agencies. If left	

Parameter Name	Required?	Description	Values
		<p>blank, 00 will default.</p> <p>The Branch Code parameter value and the FICE Code parameter value (or the SHACTRL default) are used when constructing the value for the ENT 02 segment (DOE assigned School Identification Number including branch code). If your institution is using a branch code, you must enter the value in the Branch Code parameter, even if it is also included in the OPEID parameter.</p>	
Create Summary Report	Yes	<p>This parameter allows you to produce a summary of the data being transmitted.</p> <p>Enter y to create a Summary Report for Run Modes 2 (EDI TS190) and 3 (EDI.Smart TS190). Enter n to not create a summary report.</p>	<p>Y - Create summary for Run Modes 2 and 3</p> <p>N - Do not create summary report</p>

Parameter Name	Required?	Description	Values
		<p>The default is Y.</p> <p>This summary output shows all students included in the EDI output file and has a suffix of .lis.</p> <p>Run Mode 1 will produce the Report of Missing/Invalid Data, regardless of the value selected for this parameter.</p>	
FICE Code	No	<p>Enter the institutional FICE code to be associated with the header record and individual records when transmitted in the file to third party agencies. If no code is entered, the institutional FICE code from SHACTRL will be used. If no code exists on SHACTRL, 000000 will default.</p> <p>When the Run Mode parameter is set to 2 or 3, the FICE code must exist on SHACTRL when</p>	

Parameter Name	Required?	Description	Values
		SFRNSLC is run, or it must be entered here. If no FICE code is provided for Run Modes 2 or 3, the value will default to 000000, and the process will terminate with an error.	
Major 1 and CIP Code	N/A	This parameter is no longer used.	
Major 2 and CIP Code	N/A	This parameter is no longer used.	
Email Address	No	<p>Enter y to include the email address in the extract. Leave blank to not include this data. The default is Null.</p> <p>The email address reported is determined by the following criteria:</p> <ul style="list-style-type: none"> • If one email address exists, it is reported. • If multiple email addresses exist, the preferred email address is reported. (The Preferred check 	<p>Y - Include email address</p> <p>Null - Do not include</p>

Parameter Name	Required?	Description	Values
		<p>box is checked on SPAIDEN.)</p> <ul style="list-style-type: none"> If multiple email addresses exist, and none are designated as preferred, no email address is reported. <p>Used with Run Mode 2 or 3.</p>	
Gender	No	<p>Enter Y to include the gender in the extract. Leave blank to not include this data. The default is Null.</p> <p>When Y, the value of the SPBPERS_SEX column is used. When the SPBPERS_SEX column is set to N, that is reported as U.</p> <p>Used with Run Mode 2 or 3.</p>	<p>Y - Include gender</p> <p>Null - Do not include</p>
Race	No	<p>Enter Y to include the race in the extract. Leave blank to not include this data. The default is Null.</p>	<p>Y - Include race</p> <p>Null - Do not include</p>

Parameter Name	Required?	Description	Values
		<p>When set to Y, the value of the STVETHN_ETHN_CODE column is reported where the value of the STVETHN_CODE column is equal to the value of the STVETHN_CODE column.</p> <p>Used with Run Mode 2 or 3.</p>	
Class Level	No	<p>Enter Y to include the class level in the extract. Leave blank to not include this data. The default is Null.</p> <p>An NSC class level translation equivalent must be set up for each class level code on STVCLAS using the NSC Class Level Translation field.</p> <p>Used with Run Mode 2 or 3.</p>	<p>Y - Include class level</p> <p>Null - Do not include</p>
Banner ID	No	<p>Enter Y to include the Banner ID in the extract. Leave blank</p>	Y - Include Banner ID

Parameter Name	Required?	Description	Values
		to not include this data. The default is Null. Used with Run Mode 2 or 3.	Null - Do not include
SSN	No	Enter Y to include the SSN in the extract. Leave blank to not include this data. The default is Y. The SSN data is required by the NSC for federal compliance reporting. Questions concerning whether the SSN is required by your institution should be submitted to the NSC. When the SPBPERS_SSN field is Null, NO SSN is printed on the output. Used with Run Mode 2 or 3.	Y - Include SSN Null - Do not include
Report Start and End Dates	No	Enter Y to report the enrollment start and end dates by student for the term. Leave blank to use the	Y - Report enrollment dates Null - Use the corresponding term

Parameter Name	Required?	Description	Values
		<p>corresponding term dates. The default is Null.</p> <p>When sent to Y, the process looks at the registration record for the student and reports the minimum start date and the maximum end date from all enrolled courses.</p> <p>Courses must have the Count in Enrollment indicator checked on STVRSTS for the course registration status code, and the student cannot be withdrawn.</p> <p>Used with Run Mode 2 or 3.</p>	date
Process by Student Period	Yes	Enter Y to process enrollment by a student centric period for the extract or N to not process enrollment by a student centric period. The default is N.	<p>Y - Use student centric period</p> <p>N - Do not use student centric period</p>
OPEID	No	Enter the number for the OPEID where the	If there is not a value for the OPEID, the

Parameter Name	Required?	Description	Values
		enrollment is certified. This is the combined six-digit school code and the two-digit school location code.	data will not be included in the output file to send to NSLDS.
Citizenship	No	<p>Enter Y to include citizenship data in the extract. Leave Null to not include the information.</p> <p>When set to Y, citizenship is reported based on the value in the STVCITZ_EDI_EQUIV column, where the value in the SPBPERS_CITZ_CODE column is equal to the value in the STVCITZ_CODE column.</p>	
Nation Code	No	<p>Enter the default EDI nation code to be used for processing student addresses. This value is used with the SPRADDR_NATN_CODE value is Null.</p> <p>When this parameter is blank, no default value is captured.</p>	Nation Code Validation Form (STVNATN)

Parameter Name	Required?	Description	Values
Previous Rpt Term and Sequence	N/A	This parameter is no longer used.	
Continuing Education Level	No	Enter the continuing education level code to be used for processing.	Level Code Validation Form (STVLEVL)
Remedial Course	No	Enter the remedial course attribute code to be used for processing. This parameter is used with Achieve the Dream reporting.	Attribute Validation Form (STVATTR)
Pell Grant	No	Enter the Pell Grant detail code to be used for processing. This parameter is used with Achieve the Dream reporting.	Detail Code Control Form (TSADETC)
User Final Date	No	Enter Y to use Final Exam Dates. This parameter will check CRN (SORFNCR) Section Finals End Dates, Parts of Term SORFNPT Finals End Dates and STVTERM dates. The maximum end dates from the	Y - Final Exam Dates Form (SOAFNDT). N - Process as normal. The process looks at the registration record for the student.

Parameter Name	Required?	Description	Values
		<p>comparison is reported.</p> <p>Enter N to process as normal.</p> <p>Default value is set to N.</p> <p>Courses must have the Count in Enrollment indicator checked on STVRSTS for the course registration status code.</p> <p>Used with Run Mode 2 or 3.</p>	
Use Curriculum Start/End Dates	No	<p>Enter Y to use curriculum Start and End dates from Curriculum or Field of Study</p> <p>Enter N to process as normal.</p> <p>Default value is set to N.</p> <p>The parameter first checks for Field of Study Start and End Date, then the Curriculum Start and</p>	<p>Y - Curriculum Start and End dates.</p> <p>'N' - Process as normal.</p>

Parameter Name	Required?	Description	Values
		End Date. If neither exist the process leverages dates based on parameter 24, Report Start and End Dates.	

Time Status Calculation Update Process (SFRTMST)

Updated: August 27, 2020

This process calculates student enrollment time statuses in batch mode and updates/ inserts time status history records in preparation for reporting student enrollment data to the National Student Clearinghouse (NSC).

Students are selected for processing only if the current time status calculated by this process is different from the most recent existing time status that is stored in the database. This process should be run if the **Calculate Time Status (Indicator)** on the Term Control Form (SOATERM) has not been selected (set to N) during any period of registration processing for a term.

This process uses the **Count in Time Status (Indicator)** on STVRSTS for each course registration status code on each CRN to determine which sections are included in the time status calculation. The time status calculation will use the sum of the credit hour hold values (SFRSTCR_CREDIT_HR_HOLD) where the **Count in Time Status (Indicator)** is set to Y. Therefore, if the **Count in Time Status (Indicator)** is checked for a course registration status code on STVRSTS, the SFRSTCR_CREDIT_HR_HOLD value will be used. Otherwise, time status hours will default to zero for the course. This allows an institution to set the **Count in Enrollment (Indicator)** to any value needed for institutional processing and without creating any processing issues for the time status calculation.

The process should initially be run in Audit Mode to allow messages to be reviewed. Any messages that reflect errors in the database must be corrected. The process can be run in Audit Mode as many times as needed before being run in Update Mode. If no records need to be updated, the message `No Time Status Records to be Updated` will print on the report output. This process can also be used as an additional error detection

process in conjunction with the of running the Clearinghouse Extract Process (SFRNSLC) in the Report of Missing/Invalid Data Mode.

The process calculates the student centric period time status in addition to the existing term time status when the student has a cycle designator in effect for the registration term and CRNs being processed. A new student centric period time status history record is inserted in SFRSTSH if the time status for the student centric period has changed after the last update. If the time status has not changed, no additional record is created. When a student has a manually inserted time status record, no additional time status record is inserted.

Parameter Name	Required?	Description	Values
Run Sequence Number	No	Sequence number that is system-generated by Job Submission.	
Term Code	Yes	Enter the registration enrollment term for the time status update.	Term Code Validation Form (STVTERM)
Campus Code	Yes	Enter the single campus to be processed, or enter % for all.	Campus Code Validation Form (STVCAMP)
Level Code	Yes	Enter the single level to be processed, or enter % for all.	Level Code Validation Form (STVLEVL)
Run Mode (A=Audit or U=Update)	Yes	A or Audit mode will print a report of the calculated student enrollment time statuses, without actually updating the database. U or Update mode will update/insert time status history records.	A - Audit mode U - Update mode

Parameter Name	Required?	Description	Values
Calculate SCP Time Status	Yes	<p>Enter Y to calculate the student centric period time status for students assigned to a cycle designator for the term being processed or N to not calculate the student centric period time status. The default is N.</p> <p>If the new student centric period time status is different from the previous one, and the Run Mode parameter is set to U, the new student centric period time status history record will be inserted into the database.</p>	<p>Y - Calculate student centric period time status</p> <p>N - Do not calculate student centric period time status</p>

NSLDS SSCR Process (SFRSSCR)

Updated: August 27, 2020

This process is used to read and process the NSLDS Student Status Confirmation Report (SSCR) Roster and Error Notification Files. The Roster File is the first file that is received, and should be run in Audit mode, then Create flat file mode.

All errors identified in Audit mode must be corrected, and Audit mode may be run as many times as needed, to diagnose and resolve problems with the data. When all data problems have been resolved, no errors will appear under either the Matched Records

heading or the New Students Added to SSCR File heading on the report output.

Any records listed under the Unmatched Records heading will be reported as unknown to your institution when the process is run in Create flat file mode. The process should be run in Create flat file mode to produce the Submittal File that is returned to NSLDS. The Create flat file mode report should be reviewed for any errors that would cause missing data or data that is not valid to be submitted.

After NSLDS processes the Submittal File, an Error Notification File will be returned. That file should be processed in Error listing mode. The report information will indicate if the Submittal File was accepted without errors, or if errors exist that need correction. If errors exist, both Audit and Create flat file modes should be used to review the data and create an Error Correction File that is submitted to NSLDS.

The following output files are created when the Roster file or Error Notification file is processed in Create flat file mode.

- report output and control information listing, which includes appropriate messages about the data or processing of the file or both
- log file
- flat data file with updates that would be transmitted back to NSLDS

The name of the report listing will conform to existing standards for job submission processing or command line (host) execution. The name of the data file produced from the Roster file will be `sfrsubm.dat` (Submittal file), and the name of the data file produced from the Error Notification file will be `sfrserrec.dat` (Error Correction file), regardless if executed from job submission or the command line. Only a report control information listing is produced when the Roster file is processed in Audit mode, and the Error Notification file is processed in Audit or Error listing mode.

This process uses the **Third Party Withdrawal Indicator** on STVESTS to report students as withdrawn to the NSLDS. When the indicator is not checked, the process will not consider the student as withdrawn and will report the last time status for the student.

Students who begin a term in a degree seeking program and change to a non-degree seeking program mid-term will be reported as withdrawn from the degree seeking program in the term for which the change was made. During the term in which the change from degree to non-degree seeking is made, the student will be reported with the **Program Indicator** set to `Y`, the program level information for the degree program will be reported as withdrawn and include the withdrawal date. Additionally, no program

information will be sent for the non-degree seeking program. After the term in which the change to a non-degree seeking program was made has ended, the student will be reported with the **Program Indicator** set to *N* and no program level information will be reported for the student. Campus level information will continue to be reported.

The process also uses the **Third Party Report Indicator** on STVLEAV to select leave of absence codes for the student. The process will select leave of absence codes from the general student record to be reported as valid leaves when the indicator is checked.

Use the **Summer Flag** parameter to indicate that the processing term is a summer term or other non-required term. When this parameter is set to *Y*, the bridging process is enabled to calculate enrollment status. The bridging process reports students who are not enrolled (or enrolled less than half-time in a summer term) as enrolled with the previous term's enrollment status information instead of as withdrawn. This is "bridging" the enrollment status. A student who is enrolled half-time, three-quarter time, or full-time in a summer term will continue to be reported with the appropriate summer enrollment status. To enable this functionality, set the **Summer Flag** to *Y*, populate the **Previous Term** parameter with the term preceding the processing term, and set the **Future Term** parameter to the term immediately following the processing term.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the registration enrollment term for processing. Time status for enrolled students for this term is used to update enrollment status, if a change has occurred.	Term Code Validation Form (STVTERM)
Summer Term Flag	Yes	Set this parameter to <i>Y</i> (Yes) and populate the Previous Term and Future Term parameters for enrollment status calculations to use the bridging process.	Y – Yes N – No Parameter ValueValidations (GJAPVAL)

Parameter Name	Required?	Description	Values
		Value may be left null if not using summer bridging functionality.	
Previous Term	No	<p>Enter a term immediately preceding a summer term (or other non-required term) when using the bridging enrollment status functionality.</p> <p>Value may be left null when not using summer bridging functionality. The value entered will be ignored if the Summer Term Flag is not set to Y (Yes).</p>	Term Code Validation Form (STVTERM)
Future Term	No	Enter a term immediately following a summer term (or other non-required term) when using the bridging enrollment status functionality. Value may be left null when not using summer bridging functionality. The value entered will be ignored if the	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		Summer Term Flag is not set to Y (Yes).	
SSCR File to Process	Yes	Enter the path and file name for the SSCR Roster or Error file to process. The path and file name entered must not exceed 30 characters. If no extension for the file name is supplied, an extension of .dat is assumed.	
SSCR File Type	Yes	Enter R for a Roster File or E for an Error Notification File.	R - Roster file E - Error Notification file
Run Mode	Yes	Enter A to create an audit file, C to create a flat file, or E to create an error listing. Only A and C are valid run modes for processing a Roster File. If E is entered, Audit mode will default. A, C, and E are valid modes for processing an Error Notification File.	A - Audit file C - Create flat file E - Error listing
Address Hierarchy	Yes	Enter the address type and hierarchy for reporting permanent address information. For	Address Type Code Validation Form (STVATYP)

Parameter Name	Required?	Description	Values
		example, 1MA. Multiple values may be entered. This parameter will not be used when the Error Notification File is processed in Error listing mode.	
Aid Year Code(s)	N/A	This parameter is no longer used.	
Level Code for New Students	No	Enter the level code(s) to select students with new loans. The default value is % for all levels.	Level Code Validation Form (STVLEVL)
College Code for New Students	No	Enter the college code(s) to select students with new loans. The default value is % for all colleges.	College Code Validation Form (STVCOLL)
Campus Code for New Students	No	Enter the campus code(s) to select students with new loans. The default value is % for all campuses.	Campus Code Validation Form (STVCAMP)
Match on ID Only	No	Enter Y to match on ID/SSN only or N to match on ID/SSN and last name. The default is N.	Y - Match on ID/SSN N - Match on ID/SSN and last name
Effective Withdrawal Date	Yes	Enter Y to select the	Y - Use date from SFRWDRL

Parameter Name	Required?	Description	Values
		effective withdrawal date from the student withdrawal record (SFRWDRL_EFF_WDR L_DATE) if one exists for term, otherwise the date from the enrollment record (SFBETRM_ESTS_DATE) will be used. Enter N to select the date from the enrollment record (SFBETRM_ESTS_DATE). The default is N.	N - Use date from SFBETRM
Telephone Hierarchy	No	Enter the telephone priority and type code, such as 1HM, for reporting phone information for enrolled students.	Telephone Type Validation Form (STVTELE)
Email Hierarchy	No	Enter the email address priority and type code, such as 1EM, for reporting email information for enrolled students.	E-mail Address Type Validation Form (GTVEMAL)
OPEID	Yes	Enter the number for the OPEID where the enrollment is certified. This is the combined six-digit school code and the two-digit school location code.	

Parameter Name	Required?	Description	Values
		<p>If no school code is used, enter "00".</p> <p>If no value is entered in this parameter, the roster file OPEID is defaulted into all records.</p>	
Nation Code	No	<p>Enter the default EDI nation code to be used for processing student addresses. This value is used with the SPRADDR_NATN_CODE value is Null.</p> <p>When this parameter is blank, no default value is captured.</p>	Nation Code Validation Form (STVNATN)
Previous Rpt Term and Sequence	N/A	This parameter is no longer used.	
Continuing Education Level	No	Enter the continuing education level code to be used for processing.	Level Code Validation Form (STVLEVL)
Use Curriculum Start/End Dates	No	<p>Enter Y to use curriculum Start and End dates from Curriculum or Field of Study</p> <p>Enter N to process as normal.</p>	<p>Y - Curriculum Start and End dates.</p> <p>'N' - Process as normal.</p>

Parameter Name	Required?	Description	Values
		<p>Default value is set to N.</p> <p>The parameter first checks for Field of Study Start and End Date, then the Curriculum Start and End Date, if neither exist the process leverages dates from STVTERM.</p>	

Compliance Listener Start Up Process (SFRPINI)

Updated: August 27, 2020

This process is used to initialize the SFRPIPE process to run in the background, listening for Oracle pipe calls to execute the compliance process for registration prerequisite processing with CAPP. Run SFRPINI from the host. There are no job submission parameters for this process.

Compliance Pipe Process (SFRPIPE)

Updated: August 27, 2020

This process is used as a listening agent for DBMS_PIPE, to initiate the compliance process to perform registration prerequisite processing with CAPP. Run SFRPIPE from the host. There are no job submission parameters for this process.

The following is displayed when the process is run.

```
Waiting for work on pipename...
```

There is no hardcopy output from this process.

GTVSDAX rules with SFRPIPE

Updated: August 27, 2020

These GTVSDAX rules can be used with pipes processing for debugging purposes.

Internal Code	Internal Code Group	External Code	Description
PIPETIME	PIPETIMEOUT	300	SFRPIPE timeout in seconds
PIPESIZE	PREREQUISITES	4048	SFRPIPE pipe size
PREREGDEBG	PREREQUISITES	FALSE	Debug Msg in PreReg
PIPESELECT	PREREQUISITES	FALSE	Randomly select pipes

The PIPETIME rule allows you to change the timeout period for the pipe process. The default timeout period is 300 seconds or five minutes. The SFKPREL and SFKPIP1 packages are used by this rule.

The PIPESIZE rule allows you to change the size of the pipe used for the pipe process. The default pipe size is the Oracle default of 4048.

Warning! This value should not be changed unless specified by a technician.

The PREREGDEBG rule allows you to perform testing and debugging for pipe processing.

Warning! It is strongly advised that this rule only be set to `TRUE` when pipe process testing is taking place. Numerous calls to the `dbms_output` item are performed, which could affect system performance in a production environment.

The PIPESELECT rule provides an alternative method of selecting a database pipe from the SFBPIPE table. You can still use the method that applies load balancing communications across the pipes. The PIPESELECT rule uses values of `TRUE` or `FALSE` to toggle between the alternative pipe selection and the load balancing pipe selection. When the rule is `TRUE`, the logic randomly selects a pipe from the SFBPIPE table. When the rule is `FALSE`, load balancing is performed across the pipes as determined by SFBPIPE. The pipe naming convention in the SFBPIPE table must use the format

XXYYYYZZ: where XX is the node, YYYY is the name, and ZZ is the pipe number.

Queue Initialization Process (SFRQINI)

Updated: August 27, 2020

This process initializes the SFRADVQ listener process to be run in the background, where it listens for Oracle advanced queue calls to execute the compliance process. It can be run from job submission. SFRQINI can be compared to the SFRPINI pipe initialization process.

Parameter Name	Required?	Description	Values
Number of Listeners to Start	Yes	Enter the number of advanced queue listeners to be started from SFRADVQ. The default is 10.	

Compliance Advanced Queue Process (SFRADVQ)

Updated: August 27, 2020

This process is a listening agent for Oracle advanced queue processing. It tells advanced queuing to perform compliance processing. Run the SFRQINI process to start the SFRADVQ process. SFRADVQ can be compared to the SFRPIPE pipe listener process. There are no job submission parameters for this process.

GTVSDAX rules with SFRADVQ

Use these GTVSDAX rules with advanced queue processing.

Internal Code	Internal Code Group	External Code	Description
AQ4PIPES	CAPP	Y	All CAPP Processing
QUEUEETIME	QUEUEETIMEOUT	300	SFRADVQ timeout in seconds

The `AQ4PIPES` rule for the internal code group of CAPP is used to toggle between pipes processing (`SFRPINI` and `SFRPIPE`) and advanced queue processing (`SFRQINI` and `SFRADVQ`).

The `QUEUETIME` rule is used to change the timeout period for the advanced queue process. The delivered default timeout period is 300 seconds (five minutes). You need to set the rule to the timeout value you choose for the queue to work with the advanced queuing. The `SFKCOMM` package uses the `AQ4PIPES` rule to determine the transmission protocol, while the `SOKADVQ` package uses the `QUEUETIME` rule.

The `QUEUETIME` rule is equivalent to the `PIPETIME` `GTVSDAX` rule. The `QUEUETIME` rule states the amount of time the user is willing to wait for a response for compliance processing while using the advanced queuing option, while the `PIPETIME` rule denotes the amount of time the user is willing to wait for a response for the compliance processing while using pipes processing.

Advanced queuing can be used in place of pipes processing, but using advance queuing is not required for communication protocol. The `GTVSDAX` rules are delivered with a value of `N`, you can continue to use pipes processing.

Withdraw Pending Status Change Report (SFRNOWD)

Updated: August 27, 2020

This report is used to show which students have zero enrollment hours but have not officially withdrawn from the institution.

These students are ones who have been enrolled in a term and whose status indicates they are eligible to enroll, but no longer have any active registration for a term, because there are no `SFRSTCR` records with a **Status Code** checked as **Count in Enrollment** on the Course Registration Status Code Validation Form (`STVRSTS`).

Note: The **Withdrawal Code** on `STVESTS` is used to show that the enrollment status code is also a withdrawn indicator for this reporting process.

You can display several different groups of students in the report output:

- those who have received or could have received Title IV financial aid,
- those who received only non-Title IV aid, or

- those with no financial aid.

The report also allows you to include those students who have enrollment for the term but no credit hours in academic history (all F's, for example).

Date parameters are included in this report so as not to include students previously identified as withdrawn if desired. Dates are based on activity date on SFRSTCA.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the code of the term for which you want to run the report.	Term Code Validation Form (STVTERM)
Student Level(s)	Yes	Enter the student level or levels (such as undergraduate or graduate) for which you want to run the report. Multiple levels may be entered.	Level Code Validation Form (STVLEVL)
Financial Aid Selection	Yes	Enter the type of financial aid recipient. Enter τ for Title IV recipients only, \mathbb{F} for Financial Aid recipients, or \mathbb{A} for all students. The default is τ .	T - Title IV recipients F - Financial Aid recipients A - All students
Verify Enrollment	Yes	Enter \mathbb{Y} to verify enrollment or \mathbb{N} to not verify enrollment. The default is \mathbb{Y} .	Y - Verify enrollment N - Do not verify enrollment
Start Date	No	Enter the start date in DD-MON-YYYY format. Use this parameter to exclude students previously identified as	

Parameter Name	Required?	Description	Values
		withdrawn. Dates are based on the activity date on SFRSTCA.	
End Date	No	Enter the end date in DD-MON-YYYY format. Use this parameter to exclude students previously identified as withdrawn. Dates are based on the activity date on SFRSTCA.	
Verify History	Yes	Enter Y to verify history or N to not verify history. The default is Y. Use this parameter to include those students who have enrollment for the term but no credit hours in academic history (all F's, for example).	Y - Verify history N - Do not verify history
Grade Which Reflects Drop	No	Enter any grades which may reflect a drop.	
Campus Selection	Yes	Enter the campus for which you want to run the report, or % for all. The default is %.	Campus Code Validation Form (STVCAMP)
Sort Order	Yes	Enter the sort order for the report output. Enter 1 to sort on	1 - Student ID

Parameter Name	Required?	Description	Values
		Student ID, N to sort on Name, or L to sort on Level.	N - Name L - Level
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		parameters must be entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	

Withdrawn Student Report (SFRWDRL)

Updated: August 27, 2020

This report is used to identify students who have withdrawn from the term and need to have a Title IV refund calculated.

In other words, those students who have had a withdrawal status code with the **TIV Update Indicator** selected on the Student Withdrawal Status Code Validation Form (STVWDRL) and entered on their student record.

This report can also be used to record the student's withdrawal date for Title IV purposes and to create a withdrawal record for those students who received Title IV funds.

The report allows you to:

- Select only those students who have been awarded Title IV funds or all students.
- Select only the withdrawal enrollment status codes requested. The default for the parameter is all withdrawal enrollment status codes. You have the option of selecting all withdrawal status codes, one withdrawal status code, or multiple withdrawal status codes.
- Review the student status date and Accounts Receivable institutional charge detail to determine if changes are required.
- Use population selection.
- Sort by activity date, ID, name, withdrawal status code, and level.

Note: Address type codes need to be set up on the Crosswalk Validation Form (GTVSDAX) to map to the home address type and campus address type if you want addresses to print on the report. The value in the **Internal Code** field is used to identity the GTVSDAX address hierarchy.

Parameter Name	Required?	Description	Values
Audit or Update Mode	Yes	Enter a for Audit mode or u for Update mode. Update mode will update the database records by creating a withdrawal record for those students who received Title IV funds.	A - Audit mode U - Update mode
Term Code	Yes	Enter the code of the term for which you want to run the report.	Term Code Validation Form (STVTERM)
Student Level	Yes	Enter the student level or levels (such as undergraduate or graduate) for which	Level Code Validation Form (STVLEVL)

Parameter Name	Required?	Description	Values
		you want to run the report. Multiple levels may be entered.	
Campus Code (% for all)	Yes	Enter the code of the campus for which you want to run the report, or enter % for all. The default is %.	Campus Code Validation Form (STVCAMP)
Title IV Recipients Only	No	Enter Y to include only Title IV recipients or N to include all students.	Y - Title IV recipients only N - All students
Enrollment Status Code (% for all)	Yes	Enter the enrollment status code for the type of enrollment status to be included in the report or % for all enrollment codes. Multiple values may be entered.	Enrollment Status Code Validation Form (STVESTS)
Default WDRL Code	Yes	Enter the withdrawal code to be used for records that do not have an associated withdrawal code on STVESTS.	Withdrawal Code Validation Form (STVWDRL)
Major Sort Sequence	Yes	Enter the sort sequence for the primary sort order: I for ID, N for Name, S for Status Code, D for Date, or L for	I - ID N - Name S - Status code

Parameter Name	Required?	Description	Values
		<p>Level.</p> <p>Sorting is performed by calendar date, using the SFBETRM_ESTS_DATE value and the DATE format.</p>	<p>D - Date</p> <p>L - Level</p>
Minor Sort Sequence	No	Enter the sort sequence for the secondary sort order: I for ID or N for Name, when the Major Sort Sequence parameter is set to S, D, or L.	<p>I - ID</p> <p>N - Name</p>
Home Address SDAX Code	Yes	Enter the address type to be used as the home address for Title IV processing. This code must be defined on the Crosswalk Validation Form (GTVSDAX).	Crosswalk Validation Form (GTVSDAX)
Campus Address SDAX Code	Yes	Enter the address type to be used as the campus address for Title IV processing. This code must be defined on the Crosswalk Validation Form	Crosswalk Validation Form (GTVSDAX)

Parameter Name	Required?	Description	Values
		(GTVSDAX).	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		code entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	

Auto Grade Assignment Process (SFPAGRDR)

Updated: August 27, 2020

This process is used to assign an incomplete or institutionally defined letter grade to long-standing, ungraded, open learning registration records.

If a student has passed their expected completion date by a defined period of time (as defined in the report parameters), then the registration record will given the specified grade, thereby closing the record. The information displayed on the report comes from the student and section registration information in the SFRSTCR and SFRAREG records.

Note: The process will bypass Elevate registration records based on the integration partner code. When the `SSBSECT_INTG_CDE` on `SSASECT` is set to `ELEV8`, the record is not considered by the process.

Note: After you run the Auto Grade Assignment Process (SFPAGRD), you need to run the Grade Roll to Academic History (SHRROLL).

Parameter Name	Required?	Description	Values
Processing Term	No	Enter the term code or codes for the terms to be checked for incomplete registration records.	Term Code Validation Form (STVTERM)
Start Range From Date	No	Enter the start date for which registration records are to be processed.	
Start Range To Date	No	Enter the end date for which registration records are to be processed.	
CRN	No	Enter the CRN or CRNs for the sections to be processed, or enter % for all sections. The default is %.	
Schedule Type	No	Enter the schedule type code or codes for the sections to be processed. Enter % for all. The default is %. For example, you could select all sections with a schedule type	Schedule Type Code Validation Form (STVSCHD)

Parameter Name	Required?	Description	Values
		of self-paced.	
Instructional Method	No	<p>Enter the instructional method or methods for the sections to be processed.</p> <p>Enter % for all.</p> <p>The default is %. For example, you could select all sections with an instructional method of Web-based.</p>	Instructional Method Validation Form (GTVINSM)
Instructor	No	Enter the ID of the instructor for the sections to be processed. You may only enter one instructor in this parameter.	
Grade Deadline Grace Period	No	<p>Enter the number of calendar days for the grace period deadline. The default is 45.</p> <p>The number of calendar days is added to the most recent expected completion date. If the derived date is less than or equal to the current date, that</p>	

Parameter Name	Required?	Description	Values
		is, the registration record has passed the grade period for which a grade can be entered, then the record will be updated.	
Grade	Yes	<p>Enter the grade code to be assigned to the registration record. The default is I (Incomplete).</p> <p>Make sure the grade code is defined for each existing grading mode so SHRROLL will run correctly.</p>	Grade Code Maintenance Form (SHAGRDE)
Run Mode	Yes	<p>Enter R to produce a report of those students still without grades.</p> <p>Enter U to update the database.</p> <p>The default is R.</p>	<p>R - Audit</p> <p>U - Update</p>
Report Sequence	Yes	<p>Enter S to sort the report output by student name.</p> <p>Enter C to sort the report by CRN within term.</p>	<p>S - Sort by student name</p> <p>C - Sort by CRN within term</p>

Parameter Name	Required?	Description	Values
		The default is s.	

Registration Admin Messages Report (SFRRGAM)

Updated: August 27, 2020

This report is used to track registration errors for administrative purposes, check for in-progress prerequisites errors, view any potential schedule conflicts due to changes in class schedule, or find students who took in-progress prerequisites that may have not met the requirements.

You can use the error checking settings for registration restrictions on SOATERM when the report is run, or you can define the error checking settings using individual parameters. This report reruns the edit checking based on the settings entered by the user. These errors are not stored anywhere in the database, as this information can change constantly.

If a single term is entered in the Term parameter, both date parameters (Start Date From Date and Start Date To Date) will be set to `NULL` for the running of the report, even if valid dates have been entered in these two parameters. The control report will display `NULL` for these two fields, even though they contain the user-entered values in Banner job submission (GJAPCTL).

If a date range is used for the report (for example, the Term parameter is set to %), the Use SOATERM Error Check Flags parameter will be set to `N` for this running of the report, even though it may have been set to `Y` on GJAPCTL. The field value will be displayed on the control report as `N`, indicating that the SOATERM error checking values were not used for this specific running of the report. The values that exist on GJAPCTL for all the error checking parameters will be used for this specific running of the report, and they will be displayed on the control report.

If an individual course is entered in the CRN parameter, the process will operate only on that CRN. It is important to remember that a CRN may be involved in an error condition, even though no error is reported against that CRN. For example, if a student registers for CRN 1 and CRN 2, and a time conflict exists between the two sections, only the latter, based on the date and time it was added to the student's schedule, is assigned an error message. Therefore, if the report is run for CRN 1, no error will be generated. If the report is run for CRN 2, the time status error will be generated.

Note: If CAPP prerequisites are being processed and the pipes (SFRPINI and SFRPIPE) are not being run, the report will display an error such as `CAPP pipes error` or `CAPP processing error`.

The *Active Registration Cannot Process* error means that another user was in the record at the time this report was run, and it will need to be run against that student at a later time.

The data entered for these parameters are stored in the STVESTS, SFBETRM, and SPRIDEN tables.

Parameter Name	Required?	Description	Values
Term Code	No	<p>Enter the registration term for which administrative messages are to be processed.</p> <p>Enter % when using a date range.</p> <p>If % is entered in the Term parameter, a date range must be entered.</p>	Term Code Validation Form (STVTERM)
Start Date From Date	No	<p>Enter the start date from which registration records should be selected. Enter in DD-MON-YYYY format.</p> <p>This parameter can be used when a value of % has been entered in the Term parameter.</p>	
Start Date To Date	No	Enter the start date	

Parameter Name	Required?	Description	Values
		<p>to which registration records should be selected. Enter in DD-MON-YYYY.</p> <p>This parameter can be used when a value of % has been entered in the Term parameter.</p>	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Student ID	No	Enter the ID of the student for which administrative messages are to be reported. Multiple IDs may be entered.	
CRN	No	Enter the CRNs for	

Parameter Name	Required?	Description	Values
		which administrative messages are to be reported. Multiple CRNs may be entered.	
Report Option	Yes	<p>Enter P to report failed in-progress prerequisite messages. This option is valid only if prerequisite checking was turned on during registration.</p> <p>Enter A to report all messages.</p> <p>The default is A.</p>	<p>P - Failed in-progress prerequisites</p> <p>A - All messages</p>
Registration Access Errors	Yes	<p>Enter I to include the reporting of students whose courses could not be evaluated because they had an active registration session in progress at the time the report was run.</p> <p>Enter E to exclude the reporting of these students.</p> <p>The default is I.</p>	<p>I - Include</p> <p>E - Exclude</p>
Use SOATERM Error Check Flags	No	Use this parameter when the Report Option parameter is	Y - Use SOATERM flags

Parameter Name	Required?	Description	Values
		<p>set to A.</p> <p>Enter Y to use the error checking flags for registration restrictions on SOATERM.</p> <p>Enter N to use the parameters which follow for error checking.</p> <p>The default is Y.</p> <p>If dates have been entered in the Start Date From Date and Start Date To Dates parameters, this parameter must be set to N.</p>	N - Use parameters
Duplicates	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for duplicates errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Links	No	<p>Use this parameter instead of the error checking flag on</p>	F - Fatal error checking

Parameter Name	Required?	Description	Values
		<p>SOATERM to check for links errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	N - No checking
Corequisites	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for corequisite errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Prerequisites	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for prerequisite errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>

Parameter Name	Required?	Description	Values
Max Hours	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for maximum hours errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Time	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for time errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Approval	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for approval errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>

Parameter Name	Required?	Description	Values
		The default is N.	
Field of Study	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for field of study/ major errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
College	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for college errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Level	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for level errors.</p> <p>Enter F to check for fatal errors.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>

Parameter Name	Required?	Description	Values
		<p>Enter N to not check for errors.</p> <p>The default is N.</p>	
Class	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for class errors.</p> <p>Enter F to check for fatal errors</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Repeat Hours	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for repeat hours errors.</p> <p>Enter F to check for fatal errors</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Repeat Limit	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for repeat limit errors.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>

Parameter Name	Required?	Description	Values
		<p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	
Campus	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for campus errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Degree	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for degree errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Program	No	<p>Use this parameter instead of the error checking flag on SOATERM to check</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>

Parameter Name	Required?	Description	Values
		<p>for program errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	
Department	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for department errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Student Attribute	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for student attribute errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>
Cohort	No	Use this parameter	F - Fatal error

Parameter Name	Required?	Description	Values
		<p>instead of the error checking flag on SOATERM to check for cohort errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>checking</p> <p>N - No checking</p>
Mutual Exclusion	No	<p>Use this parameter instead of the error checking flag on SOATERM to check for mutual exclusion errors.</p> <p>Enter F to check for fatal errors.</p> <p>Enter N to not check for errors.</p> <p>The default is N.</p>	<p>F - Fatal error checking</p> <p>N - No checking</p>

Fee Assessment Report (SFRFEES)

Updated: August 27, 2020

This report is used to assist in troubleshooting and debugging fee assessment processing.

It is intended to be an efficient way to gather needed information when a question on arises on fee assessment. The report will be the primary method for the ActionLine to obtain contact data, (along with additional delivered SQL*Plus scripts).

This report lists various data values stored for a student that have the potential to meet registration assessment rule criteria. The values displayed are for enrollment data, student data, curriculum data, course registration data, optional mock fee assessment data, previous and current fee assessment, and accounts receivable records. The report processes a single ID or a population selection for a term. The report also lists a basic summary of learner data that may be used for assessment verification and can be helpful when troubleshooting assessment results. The supported parameters will be expanded in later releases to assist with reviewing assessment information.

This report can also be used as a tool for institutions to evaluate their processing rules or check on a specific group of students. For example, an institution may want to update a rule. They could take a sample population selection, and then compare the current assessment with a mock assessment to determine if this change would be appropriate. Another potential use would be if a user wanted to review assessment results for students who have a specific drop registration status (i.e., DD). They would create a population selection containing these students, and run the report. This allows them to easily compare the current assessment to the previous one, and determine if the refund was performed correctly.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the registration term for which fee assessment is to be reported.	Term Code Validation Form (STVTERM)
Student ID	No	Enter the ID of the student for which fee assessment is to be reported.	
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the	

Parameter Name	Required?	Description	Values
		ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Mock Assessment Indicator	Yes	Enter Y to process mock fee assessment or N to not process mock fee assessment. The default is N.	Y - Mock assessment N - No mock assessment
Mock Assessment Effective Date	No	Enter the date for the mock fee assessment in DD-MON-YYYY format. This parameter is the equivalent of the Assessment Date parameter in Registration Fee Assessment Process (SFRFASC). This parameter could be used to expand on the details of accounting transactions.	
Assessment Detail Indicator	Yes	Enter a value to select the level of report detail. Enter C for current detail, P	C - Current P - Previous

Parameter Name	Required?	Description	Values
		for previous detail, or B for both kinds of information. The default is B.	B - Both
Sort Order	Yes	Enter a value to select the sort order for the output. Enter N for name order or I for student ID order. The default is N.	N - Order by name I - Order by student ID

Batch Waitlist Notification Process (SFRBWLP)

Updated: August 27, 2020

This process is used to produce waitlist notifications by term for new available seats based on entries in the SFRCOLW collector table.

It will search the waitlisted sections for entries that are pending or expired (SFRWLNT) and remove those students from the waitlist. The waitlist enrollment count will then be updated for the CRN. Sleep/wake processing is used with batch waitlist notification, and the results can be sent to a specific printer.

This process also selects all records from the SFRWLNT table for the CRNs where transient errors exist, and the waitlist status is Pending. Email notifications are then resent. If the start date of the email is still within the resend period, the notification end date is extended to restart the countdown and attempt to resend the email.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term for which waitlist notifications are to be processed.	Term Code Validation Form (STVTERM)
Printer ID	Yes	Enter the ID of the printer to be used with sleep/wake	Printer Validation Form (GTVPRNT)

Parameter Name	Required?	Description	Values
		processing.	
Run in sleep/wake mode (Y/N)	No	Enter Y to use sleep/wake processing or N to not use sleep/wake cycling. The default is N. Sleep/wake mode does not produce any printed output.	Y - Use sleep/wake N - Do not use sleep/wake
Sleep Interval	No	Enter the time in seconds that the process should pause before running the job. Use values from 1 to 999999.	
Print Control Report (Y/N)	Yes	Enter Y to print the control report in the output or N to not print the control report. The default is N.	Y - Print control report N - Do not print control report

Waitlist Priority Reorder Process (SFPWLRO)

Updated: August 27, 2020

This process is used to reorder positions in the waitlist queue based on the rules defined on SOAWLTC.

Waitlists are sorted by waitlist priority order and the timestamp for the course registration status code (STVRSTS). Reordering can be performed by term and CRN or by term and cross list group. Manual overrides can be included in the reordering process. If an entry has a manually assigned waitlist priority that is not overridden, it will not be processed.

Reordering is only applied to sections that fit the selection criteria and is done on a first

come, first served basis within each rule. Waitlists for cross-listed courses are consolidated and reordered as a single waitlist for the group. Waitlists for courses with reserved seats and overflow allowances are consolidated and reordered as a single waitlist. Waitlists for courses with reserved seats but without overflow allowances are treated as a single waitlist.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the term code for which waitlist priorities are to be reordered.	Term Code Validation Form (STVTERM)
CRN	No	Enter one or more CRNs for which waitlist priorities are to be reordered. If a value is entered in this parameter, the Cross List Group parameter cannot be used.	
Cross List Group	No	Enter the cross list group (SSAXLST) to be used to process specific cross-listed CRNs. This parameter cannot be used when a value is entered in the CRN parameter.	
Manual Override	Yes	Enter Y to include manual overrides in the reordering process or N to not include the overrides.	Y -Include manual overrides N - Do not include manual overrides

Feedback Monitor Students Process (SFRFFMN)

Updated: August 27, 2020

This process uses a population selection to find students registered for a course in a specific term that are required to be monitored by faculty members.

Students are designated as monitored, and a feedback record for each monitored student is loaded to the Faculty Feedback Student Estimated Grade Table (SFRFFST). Students not designated as monitored are optional and are not considered by the process.

When a faculty member views the Faculty Feedback Roster (`bwlkfdbk.P_FacultyFeedback`) in Banner Faculty and Advisor Self-Service, the students that require feedback are displayed, and the student marked as Monitored have the status of Monitored. When an issue or recommendation has been entered for a monitored student, the Monitored status changes to Complete. Students with an Optional status remain as optional.

If desired, the process can be executed multiple times for the same session with different populations. Subsequent executions add new students not marked as Monitored.

This process calls the `sb_feedback_session` API and the `sb_estimated_grades` API.

Parameter Name	Required?	Description	Values
Session Term Code	Yes	Enter a term code to be assigned to the feedback session.	Term Code Validation Form (STVTERM)
Feedback Session Description	Yes	Enter the description of the feedback session.	
Application Code	Yes	Enter the code that identifies the general area for which the selection identifier was defined. The population selection parameters are required for this	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		process. The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Selection Identifier	Yes	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Form (GLISLCT). The population selection parameters are required for this process.	Population Selection Inquiry Form (GLISLCT)
Creator ID	Yes	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. The population selection parameters are	

Parameter Name	Required?	Description	Values
		required for this process.	
User ID	Yes	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. The population selection parameters are required for this process.	

Faculty Feedback Purge Process (SFRFFPG)

Updated: August 27, 2020

This process is used to purge records for a term and session description for the start and end dates of the session control record.

The feedback session end date must be in the past. Data purged includes: feedback session definition, estimated grades and comments, and issues and recommendations. The feedback session definition can be deleted from the user interface as long as no feedback exists. When feedback exists, SFRFFPG must be used.

Parameter Name	Required?	Description	Values
Session Term Code	Yes	Enter the term code for the session to be purged, or enter % for all.	Term Code Validation Form (STVTERM)
Feedback Session Description	Yes	Enter the feedback session description for the session to be purged.	

Gainful Employment Student Creation (SFPGESc) report

Updated: September 19, 2024

This report is used to retrieve data for gainful employment reporting based on processing rules.

There are two run modes for the SFPGESc report:

- Write to table mode (T) – For the identified students, the write to table mode calculates a new batch ID, calculates the fields that all students need, including current program status (F, Q, H, L, A, G, or W). For program status F, Q, H, L, or A, write to table mode calculates the values of the AA fields for the specified award year. For program status G or W, write to table mode calculates the values of the TA fields for the total across award years. It also writes the student information to SFRGEFM with the batch ID.
- Write to file mode (F) – For the identified aid year and optional batch ID, write to file mode creates a `.csv` file with the information from the SFRGEFM table.

Report Parameters

Updated: July 17, 2025

Here are the parameters used with SFPGESc.

Parameter Name	Required?	Description	Run mode
Aid Year Code	Yes	Enter the aid year to select students.	File and Table
Run Mode	Yes	Enter Run Mode. F (write to file) T (write to table).	File and Table
Effective withdrawal date	No	Use the effective withdrawal date from SFRWDRL if available; otherwise, use the term start date.	Table
Process by Student	No	Enter Y to process by	Table

Parameter Name	Required?	Description	Run mode
Period		student-centric period.	
Application Code	No	Application is required to run with Population Selection.	Table
Selection Identifier	No	Selection is required to run with Population Selection.	Table
Creator ID	No	Creator ID is required to run with Population Selection.	Table
User ID	No	User ID is required to run with Population Selection.	Table
OPEID or Third Party Code	No	OPEID or Third Party Code for Student Records.	Table
Batch ID	No	Enter the Batch ID for Report Submission.	File
Included students	No	A (all students) G (Graduated and Withdrawn) Q (Qualifying Graduate Programs)	File

Gainful Employment Program Creation (SFPGEPC) report

Updated: September 19, 2024

This report is used to retrieve data for gainful employment reporting based on processing rules.

There are two run modes for the SFPGEPC report:

- Write to table mode (T) – For the identified programs, write to table mode calculates a new batch ID, calculates the values of the fields for each program, and writes the program information to SFRGEPM with the batch ID.
- Write to file mode (F) – For the identified aid year and optional batch ID, write to file mode creates a .csv file with the information from the SFRGEPM table.

Report Parameters

Updated: September 19, 2024

Here are the parameters used with SFPGEPC.

Parameter Name	Required?	Description	Run mode
Aid Year Code	Yes	Enter the aid year to select students.	File and Table
Run Mode	Yes	Enter Run Mode. F (write to file) T (write to table).	File and Table
OPEID or Third Party Code	No	OPEID or Third Party Code for Student Records.	File
Batch ID	No	Enter the Batch ID for Report Submission.	Table

Gainful Employment Program Purge (SFPGEPP) report

Updated: September 19, 2024

This report is used to purge program data from gainful employment reporting based on processing rules.

Report Parameters

Updated: September 19, 2024

Here are the parameters used with SFPGEPP.

Parameter Name	Required?	Description
Aid Year Code	Yes	Enter the aid year to select programs.
Batch ID	No	Enter the Batch ID.
Run Mode	Yes	Enter A for Audit mode, and enter U for Update mode.

Gainful Employment Purge Process (SFPGEED)

Updated: August 27, 2020

This purge process is used to remove the records from the Gainful Employment File Maintenance Table (SFRGEFM) for an aid year or a batch ID or both. Run the process in Audit mode to check the data to be purged and Update mode to update the database.

Parameter Name	Required?	Description	Values
Aid Year Code	Yes	Enter the aid year for which students are to be purged. Values come from the Financial Aid Process Year field on STVTERM.	
Batch ID	No	Enter the batch ID for the SFPGES report to be purged.	
Run Mode	Yes	Enter A to run in Audit mode and print an audit report for	A - Audit mode

Parameter Name	Required?	Description	Values
		fee assessment. Enter <code>U</code> to update the database records. The default is <code>A</code> .	U - Update mode

Student Block Pre-Assignment Process (SFPSBPA)

Updated: August 27, 2020

This process is used with block registration processing in Banner Student Registration 9.x.

The Student Block Pre-Assignment Process (SFPSBPA) is used to pre-assign a block to a specific student, to multiple students, or to a selected population. Population selection parameters are used to pre-assign a block to more than one student ID at a time. The rules defined in the Block Rules Definition Page (SFABRDF) are used to pre-assign a block to the student. The pre-assigned block is displayed as *Suggested* in Banner Student Self-Service Registration.

Note: Before the Student Block Pre-Assignment Process (SFPSBPA) is run, the CRNs must be associated with a block on the Block Schedule Control Page (SFABLCK).

Only one block can be pre-assigned to the student at a time, using the Student Block Pre-Assignment Process (SFPSBPA). If a student is permitted to select multiple blocks in Self-Service, based on the rule defined in SFABRDF, then the system identifies the block with fewer pre-assigned students and pre-assigns it to the student. This ensures equal distribution of students to all the available blocks that are associated with the rule. After the block has been pre-assigned to the student, the Student Block Pre-Assignment Page (SFABLPA) can be used to verify the assignment.

When two block rules apply to a student but the defined priorities are different, the rule with highest priority (lowest priority number) will be selected for pre-assigning a block to a student. When two rules match exactly and the defined priorities are the same, the first one found is selected for pre-assigning a block to a student.

The SFPSBPA process does not require that any permit/override options be checked on the Registration Permit-Overrides Control Page (SFAROVR). The process will display a message in the `.log` file when the override code defined on the Pre-Assigned Block Configuration Page (SFAPABC) is not defined on SFAROVR or does not have any options

checked. The override code on SFAPABC is ignored by the process in this case.

When a term is selected for registration, SFPSBPA uses the specific term associated with the rule on SFABRDF instead of using an effective term. The process must use a term that is exact to the rule, not a term that falls within a range or comes after a particular term. For example, for term 201610, a rule must exist on SFABRDF for that term. The rule cannot be for a term within a range of 201510 to 201710 or for a term that comes after term 201510.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code to be used for block pre-assignment.	Term Code Validation Page (STVTERM)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Page (GLISLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Page (GLISLCT)
Selection Application	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population	Application Inquiry Page (GLIAPPL)

Parameter Name	Required?	Description	Values
		Selection Extract Inquiry Page (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Selection Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	
Selection User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or none of the population selection parameters must be entered.	
ID Number	No	Enter the SPRIDEN ID of the student to be included in block pre-assignment.	

Parameter Name	Required?	Description	Values
Level Code	No	<p>Enter the level code for block pre-assignment.</p> <p>The level code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).</p>	Level Code Validation Page (STVLEVL)
College Code	No	<p>Enter the college code for block pre-assignment.</p> <p>The college code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).</p>	College Code Validation Page (STVCOLL)
Program Code	No	<p>Enter the program code for block pre-assignment.</p> <p>The program code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).</p>	Program Definitions Rules Page (SMARPLE)
Major Code	No	<p>Enter the field of study code for block pre-assignment.</p> <p>The field of study</p>	Major, Minor, Concentration Code Validation Page (STVMAJR)

Parameter Name	Required?	Description	Values
		code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).	
Student Type	No	<p>Enter the student type code for block pre-assignment.</p> <p>The student type code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).</p>	Student Type Code Validation Page (STVSTYP)
Student Class	No	<p>Enter the student class code for block pre-assignment.</p> <p>The student class code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).</p>	Class Code Validation Page (STVCLAS)
Sort Type	No	<p>Enter the sort type for all students retrieved by the process. Choices are:</p> <ul style="list-style-type: none"> • A - 	<p>A - Alphabetical sort</p> <p>G - GPA sort</p> <p>T - Test score sort</p>

Parameter Name	Required?	Description	Values
		<p>Alphabetical. Students are sorted in alphabetical order. This is the default.</p> <ul style="list-style-type: none"> • G - GPA. Students are sorted by their GPAs. • T - Test Score: The process sorts records based on freshman student registration and then on test scores. 	
Test Code	No	<p>Enter the test code for block pre-assignment.</p> <p>If the Test Score sort type is selected in the Sort Type parameter, then this parameter must be entered.</p>	Test Code Validation Page (STVTESC)
Override Assigned Block? [Y/N]	Yes	Enter Y to delete the previously pre-assigned block before a new block is pre-assigned to a	Y - Delete the previously pre-assigned block record and insert a new record

Parameter Name	Required?	Description	Values
		<p>student for a given term.</p> <p>Enter N not to override the previously pre-assigned block to a student for a given term.</p> <p>Manually pre-assigned blocks will be overridden by the process.</p>	N - Do not override previously pre-assigned block records
Verify Capacity? [Y/N]	Yes	<p>Enter Y to verify the block capacity defined on the Block Schedule Control Page (SFABLCK) during the pre-assignment of a block to the student, using the Student Block Pre-Assignment Process (SFPSBPA).</p> <p>Enter N not to verify the block capacity defined on SFABLCK during the pre-assignment of a block to the student, using the SFPSBPA.</p>	<p>Y - Verify the block capacity during pre-assignment</p> <p>N - Do not verify block capacity during pre-assignment</p>
Generate Ovr Permission? [Y/N]	Yes	Enter Y to update the previous override	Y - Update the previous override

Parameter Name	Required?	Description	Values
		code for the block in the Block Web Student Pre-Assigned Table (SFRBLPA). Enter N to not update the previous override code for the block in the SFRBLPA table.	code for the block N - Do not update the previous override code for the block
Detailed Report [Y/N]	Yes	Enter Y to generate a detailed report that includes listing the block information, the students who are pre-assigned to the block, and so on. Enter N to not generate a detailed report.	Y - Generate a detailed report N - Do not generate a detailed report
Enter Run Mode [A/U]	Yes	Enter A to run the process in Audit Mode and produce a report for distribution results and fee assessment. Enter U to update the database records. The default is A. If A (Audit Mode) is used to view the distribution results,	A - Audit Mode U - Update Mode

Parameter Name	Required?	Description	Values
		then the Override Assigned Block parameter will be ignored.	
Curriculum	Yes	<p>Enter A to validate the curriculum code entered against all the curriculum records (both primary and secondary) in the Learner Curricula Table (SORLCUR).</p> <p>Enter P to validate the curriculum code entered against only the primary curriculum records in the Learner Curricula Table (SORLCUR).</p>	<p>A - All curriculum records</p> <p>P - Primary curriculum records</p>

Incomplete Registration Report (SFRIBLR)

Updated: August 27, 2020

This report is used with block registration processing in Banner Student Registration 9.x.

The Incomplete Block Registration Report (SFRIBLR) is used to retrieve details of students who have not been successfully registered for all the CRNs in a registration block. The report output is grouped by the student's college, level, major, program, and ID. Student type and student class are also reported.

A report can be produced for a specific student ID or for a population selection. If a population or single ID is not specified, the report is processed for all the students.

Note: When the Report Level parameter is set to c (Catalog), processing does not validate the schedule type for the CRNs/sections. For example, if you have CHEM 101 Lecture and CHEM 101 Lab, and only the lecture has been selected for registration, the Catalog report level does not recognize that the lab is missing. The Schedule report level does return the CHEM 101 Lab as missing.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code for which you want to see incomplete registration records.	Term Code Validation Page (STVTERM)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Page (GLISLCT) . All or none of the population selection parameters must be entered.	Population Selection Inquiry Page (GLISLCT)
Selection Application	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Page	Application Inquiry Page (GLIAPPL)

Parameter Name	Required?	Description	Values
		(GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Selection Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	
Selection User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or none of the population selection parameters must be entered.	
ID	No	Enter the SPRIDEN ID of the student to be included in the incomplete registration results.	
Level	No	Enter the level code	Level Code

Parameter Name	Required?	Description	Values
		for incomplete registration. The level code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).	Validation Page (STVLEVL)
College	No	Enter the college code for incomplete registration. The college code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).	College Code Validation Page (STV COLL)
Program	No	Enter the program code for incomplete registration. The program code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).	Program Definitions Rules Page (SMARPLE)
Major	No	Enter the field of study code for incomplete registration. The field of study	Major, Minor, Concentration Code Validation Page (STVMAJR)

Parameter Name	Required?	Description	Values
		code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).	
Student Type	No	<p>Enter the student type code for incomplete registration.</p> <p>The student type code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).</p>	Student Type Code Validation Page (STVSTYP)
Student Class	No	<p>Enter the student class code for incomplete registration.</p> <p>The student class code is validated against the existing student curriculum records in the Learner Curricula Table (SORLCUR).</p>	Class Code Validation Page (STVCLAS)
Report Level [C/S]	Yes	Enter c to report the catalog level.	<p>C - Catalog level report</p> <p>S - Schedule level</p>

Parameter Name	Required?	Description	Values
		Enter s to report the schedule level.	report
Detailed Report [Y/N]	Yes	<p>Enter y to generate a detailed report that includes listing the block information, the students who are pre-assigned to the block, and so on.</p> <p>Enter n to not generate a detailed report.</p>	<p>Y - Generate a detailed report</p> <p>N - Do not generate a detailed report</p>

Student Projection Process (SFPPROJ)

Updated: August 27, 2020

This process is used with projected registration processing in Banner Student Registration 9.x.

This Java process takes CAPP compliance results, generates the list of projected courses, applies filters, verifies prerequisites and corequisites, and marks the most probable courses for registration. Students are selected and processed by ID or population selection when CAPP compliance results exist for the term. Only students that match the selected college, major, and student type are selected.

CAPP compliance for the primary program is used when study paths are not active. When study paths are active, CAPP compliance results are used for each active program that needs to be processed for projections. When the Curriculum parameter is set to P, only primary curriculum records are processed.

Not-met courses are identified from CAPP compliance results from each row of courses attached to areas and rules.

- When the subject and course number are specified, that course is included in the

projection.

- When a subject with a range of course numbers is specified, all courses with the subject in the range of course numbers are included in the projection.
- When only the subject is specified, no courses are included in the projection, but the subject is projected.
- When a rule only includes attributes, no courses are included in the projection, but the attribute is projected.
- When a rule only includes the course number, no courses are included in the projection, but the course number is projected.
- When the rule description contains the elective rule key specified on SOATERM, courses are marked as electives in the projection. Rules are designated as elective on the Projection Maintenance Page (SFAPROJ).

Note: Lists of projected courses generated previously for the term are deleted when the process is run.

Name	Required?	Description	Values
Registration Term	Yes	Enter the term code for the projected term being processed for the student.	Term Code Validation Page (STVTERM)
Schedule Term	No	<p>Enter the schedule term to be processed.</p> <p>This term is used when the Pre-req checking? [Y/N] parameter or the Co-req checking? [Y/N] parameter is set to Y.</p> <p>If no value is entered, the term</p>	Term Code Validation Page (STVTERM)

Name	Required?	Description	Values
		entered in the Registration Term parameter is used for the schedule term.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Inquiry Page (GLISLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Page (GLISLCT)
Selection Application	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract Inquiry Page (GLIEXTR) may be used to review the	Application Inquiry Page (GLIAPPL)

Name	Required?	Description	Values
		people who will be processed in the load from the selection identifier and application code entered.	
Selection Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	
Selection User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or none of the population selection parameters must be entered.	
ID Number	No	Enter the ID number for the student being processed. If this parameter is not used, the population selection	

Name	Required?	Description	Values
		parameters must be used. If the population selection parameters are not used, this parameter must be used.	
College	No	Enter the college code for the student.	College Code Validation Page (STVCOLL)
Major	No	Enter the major code for the student.	Major, Minor, Concentration Code Validation Page (STVMAJR)
Student Type	No	Enter the student type code for the student.	(STVSTYP)
Curriculum	Yes	Enter P to use the primary curriculum record for the student or A to use all curriculum records. The default is P.	P - Primary curriculum record A - All curriculum records
Campus	No	Enter the campus code for the student. The campus code is used with prerequisite and corequisite checking.	Campus Code Validation Page (STVCAMP)
Included Offered	No	Enter Y to include	Y - Offered courses

Name	Required?	Description	Values
Courses [Y/N]		only offered courses in processing or N to include all courses. The default is N.	N - All courses
Pre-req checking? [Y/N]	No	Enter Y to execute prerequisite checking during processing or N to not use prerequisite checking. The default is Y.	Y - Use prerequisite checking N - No prerequisite checking
Co-req checking? [Y/N]	No	Enter Y to execute corequisite checking during processing or N to not use corequisite checking. The default is Y.	Y - Use corequisite checking N - No corequisite checking

Schedule Planning Report (SFRPRES)

Updated: August 27, 2020

This report is used with projected registration processing in Banner Student Registration 9.x.

The report produces a list of courses with the expected number of students to be registered in each active course in the Course Catalog. This can assist with schedule planning for the upcoming term. The numbers returned are based on the most probable courses for all available term projections. Historic enrollment data from two previous terms is included in the report, and courses are grouped by college and department.

Name	Required?	Description	Values
Term	Yes	Enter the term code for the projected term to be processed. Multiple codes can be entered.	Term Code Validation Page (STVTERM)
College	No	Enter the college code for the college to be included. Multiple codes can be entered.	College Code Validation Page (STVCOLL)
Department	No	Enter the department code for the department to be included. Multiple codes can be entered.	Department Code Validation Page (STVDEPT)

Course Program of Study Process (SFPCPOS)

Updated: August 19, 2021

The Course Program of Study Process (SFPCPOS) is a Java process used to identify courses in which a student is registered that count toward the student's program.

The process uses the registration term information on the Course Program of Study Control (SFACPSC) page to determine the terms to process. It sends a request to CAPP or Degree Works for a degree evaluation or audit, and updates the data in the Student Course Evaluation Audit Table (SFRSCORE). It also captures remedial courses and hours, English as a Second Language (ESL) courses, repeat coursework, and repeat hours calculations. SFPCPOS then analyzes changes in registration, curriculum, and academic history records.

You can run the process on demand by setting the On Demand Evaluation parameter to `Y`. When the parameter is set to `Y`, SFPCPOS produces an audit for a student or group of students that includes all students you have selected, even if there is no change to the student's record.

You can run the process through job submission, schedule it to run automatically, or schedule it as a sleep/wake process.

When you run the process in batch mode, SFPCPOS evaluates all students. It compares each student's information against the active terms found on SFACPSC. If the student's information has changed as of the last CPoS audit, SFPCPOS will reevaluate the student's term. SFPCPOS reviews each of these areas to determine if there are changes:

- Registration
- Academic History
- Curriculum

The packaged files that launch and execute the process include the `sfpcpos.jar` file and the `sfpcpos.sh` file. The process captures registration changes that it uses to identify whether the courses in which a student is registered are counted toward the student's program or degree. GORRSQL rules are used to identify remedial and ESL classes.

Note: You can also run SFPCPOS to run financial aid repeat processing. Processing is based on defined rules and controls.

SFPCPOS updates and inserts student records into the SFRSCORE table. It also updates CAPP records for use with the Degree Evaluation process, and updates Degree Works records for use with the Degree Audit Evaluation. The process logs the audit ID for the evaluation, and you can use this to check the results.

Parameter Name	Required?	Description	Values
Run Mode	Yes		<p>Values are:</p> <ul style="list-style-type: none"> • B - Run in batch (default) • P - Run with population selection • S - Run for a student ID <p>Warning! Running a Batch process (Parameter 01 = B) with on demand evaluation</p>

Parameter Name	Required?	Description	Values
			(Parameter 09 = Y) will result in SFPCPOS evaluation for every student and course in each active Term on the Course Program of Study Control Form (SFACPSC). This can take an extensive amount of time and affect overall system performance. Please exercise caution.
Selection Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		identifier must be defined on the Population Selection Inquiry Form (GLISLCT). All or none of the population selection parameters must be entered.	
Selection Creator ID	No	Enter the user ID of the person creating the sub-population rules. The creator ID must have been specified when defining the selection identifier. All or none of the population selection parameters must be entered.	
Selection User ID	No	Enter the user ID for the population selection. This will match the creator ID and is the Banner logon user ID. All or none of the population selection parameters must be entered.	
Student ID	No	Enter the ID of the specific student to be processed. This parameter is used when the Run Mode parameter is set to	

Parameter Name	Required?	Description	Values
		S.	
Run in Sleep/Wake Mode	Yes	Enter Y to start sleep/wake cycling for this process. The default is N.	Values are: <ul style="list-style-type: none"> • Y - Use sleep/wake processing • N - Do not use sleep/wake processing
Sleep Interval	No	Enter the time in seconds to process pauses before resuming execution. This parameter is used when the Run in Sleep/Wake Mode parameter is set to Y. The lowest enterable value is 1. The highest enterable value is 86400. The default is 60.	
On Demand Evaluation	No	This feature enables the user to run SFPCPOS for a student, or group of students, without any change having occurred to the Registration Status, Academic History or Curricula.	Values are: <ul style="list-style-type: none"> • Y - Use On Demand Evaluation processing • N or (null) - Do not use On Demand Evaluation processing

Export File to OraDir (SMRORAD)

Updated: June 16, 2022

Degree Evaluation reports require an updated version of the `smrcrlt.xml` file to display appropriately in self service. The Export File to OraDir (SMRORAD) process contains the updated `smrcrlt.xml` file and will write it to the Oracle directory named `SCHEMA_XSLDIR`.

This process enables Banner SaaS users to manage the placement of the updated version of the file in the appropriate directory without additional assistance.

For more information, refer to *Banner Student CAPP content* in the *Banner Student Use* content in the Ellucian Documentation site.

Parameter Name	Required?	Description	Values
file name	Yes	Enter <code>smrcrlt.xml</code>	
Oracle directory	Yes	Enter the Oracle directory: <code>SCHEMA_XSLDIR</code>	

Populate Engagement Details (SOPSPDF) process

Updated: October 21, 2021

The SOPSPDF process allows institutions to populate the engagement details (Student ID and Study Path) that is available in the SGACHRT page into the SOBENGA table.

The SOPSPDF accepts Cohort Code and Term as input parameters, and fetches all the Student IDs and the associated Study Path numbers that the SGACHRT page maintains. Institutions should populate the Study path details in the SGACHRT page before running the SOPSPDF process.

The process then validates the information by checking if the Study Path number is present in the SGRSTSP table for the student. If available, the process inserts the Student ID and Study Path number to the SOBENGA table.

The `.log` and `.lis` files provide the summary of the successfully processed records. The files also include any errors during the process generation.

Parameter Name	Required?	Description	Values
Cohort Code	Yes	Enter the cohort code to fetch the selected population	Cohort Code Validation (STVCHRT) page
Term Code	Yes	Enter the term code of the Cohort	Term Code Validation (STVTERM) page

Populate Student Identifier (SOPHUF) process

Updated: September 22, 2022

The SOPHUF process (HESA Data Futures SIDs) allow institutions to populate the new HESA Data Futures student identifier (SID) details into the GORPSID table.

Note: Ellucian highly recommends that you copy any HUSIDs that you want to maintain in the GOAPSID page, before running the SOPHUF process.

The SOPHUF process accepts the cohort code and term code as input parameters and fetches all the active Student IDs from the SGACHRT page for the cohort and term code. The process also updates the HUSID value in the GORPSID table for the active students only if the value does not exist already. The label on the table displays as HUSID, but the displayed HUSID contains your copied HUSIDs, in addition to the newly generated SIDs. The structure of the SID is as follows:

- First 2 digits: Year of entry into provider (last 2 digits of year)
- Next 8 digits: Provider's UKPRN
- Next 6 digits: 6 digit reference number internally allocated by provider
- Last digit: Check digit

The `.log` and `.lis` files provide the summary of the successfully processed records. The files also include any errors during the process generation.

Parameter Name	Required?	Description	Values
Cohort Code	Yes	Enter the cohort code to fetch the selected	Cohort Code Validation (STVCHRT) page

Parameter Name	Required?	Description	Values
		population	
Term Code	Yes	Enter the term code of the Cohort	Term Code Validation (STVTERM) page

Update Return to Regulator (SOURRDF) process

Updated: June 28, 2023

The SOURRDF process allow institutions to populate the **Return to Regulator** indicator in various HESA Data Futures Return pages. The indicator controls the data that the system reports through HESA Data Futures.

Note: Ellucian recommends to run this process before the HESA Data Future return. You can clear the **Return to Regulator** check box if you do not want the data to be reported.

The SOURRDF process accepts the multiple cohort code, multiple term code, Reference Start Date, and Reference End Date as input parameters and fetches all the active Student IDs from the SGACHRT page for the cohort and term code combination.

The system updates the Module Instance, Course, Session, Venue and Qualification Return to Regulator values based on the Course Session details that comes from the SOASTCS page. The SOASTCS page fetches data for a given student and engagement number where the Course ID is present and the data is within the reference period range.

Parameter Name	Required?	Description	Values
Cohort Code	Yes	Enter the cohort code to fetch the selected population.	Cohort Code Validation (STVCHRT) page
Term Code	Yes	Enter the term code of the Cohort.	Term Code Validation (STVTERM) page
Reference Start Date	Yes	Enter reference period start date.	Date
Reference End Date	Yes	Enter reference period end date.	Date

Parameter Name	Required?	Description	Values
Reset R2R (Y/N)	No	Select Y or N to reset the Return to Regulator indicator.	<ul style="list-style-type: none">• Accepts the Y (Yes) and N (No) values• If you select the values as Y, irrespective of the Term and Cohort that you enter, all the Return to Regulator indicators will be reset to N.• If it is set to N or left blank, the existing values of the Return to Regulator indicators will remain as is.

Academic History

Updated: June 28, 2023

Grade Roll to Academic History Process (SHRROLL)

Updated: August 27, 2020

This process is used to roll grades entered in Registration through the Class Roster Form (SFASLST) and the Attendance Roster Form (SFAALST) or online through Banner Faculty and Advisor Self Service into Academic History. (Grades may also be rolled online through SFASLST and SFAALST).

The grade roll creates a term header record in academic history and copies courses from registration into the Term Course Maintenance Form (SHAINST). The process also populates the term header record with the student centric period when the record is created during the roll process and the student has a student centric period associated with the term or a cycle designator in effect for the term.

Grade Roll and Degree Records

Updated: August 27, 2020

The grade roll will create a degree record in academic history with a status of so (Sought), if no degree record already exists.

The learner curriculum that is active for the term associated with the graded courses that are being rolled will become the sought outcome curriculum for the newly created degree record.

- If a degree record already exists with the status of so (Sought) or any status where the **Awarded Indicator** (STVDEGS_AWARD_STATUS_IND) is set to P (Pending), and the student's learner curriculum (program, degree, level, and college) for the term in which the courses are registered, graded, and to be rolled matches the existing curriculum on the degree record with the status of so or any status where the **Awarded Indicator** is set to P, the courses will be rolled into that existing, matching degree record.

- If the program, degree, level, and college in the learner and outcome curriculum records match, but the campus or active field of study data in the term being rolled differ, a new degree record will be created that includes the changed or new campus and field of study information.
- If the program, degree, level, and college are the same, but the major is different, the major on the existing degree record is updated to reflect the change in major information.
- If a degree record exists with the status of SO or any status where the **Awarded Indicator** is set to P, and the student's learner curriculum for the term in which the registered and graded courses to be rolled does not match the existing, active outcome curriculum values of program, degree, level, and college, a new degree record with status of SO will be created with the new curriculum information from the term being rolled.
- If a degree record exists with any status where the **Awarded Indicator** is set to A (Awarded), and additional courses are then graded and rolled, a new degree record with a status of SO will be created using the active learner curriculum, even if all curriculum information matches that of the awarded degree.

Grade Roll and the Curriculum Roll Indicator

Updated: August 27, 2020

The Roll Indicator (SORLCUR_ROLL_IND) on SORLCUR (**Roll Learner** radio group on SOILCUR) is only applicable to the General Student (Learner) module.

Therefore, the **Roll Learner** option group on SGASTDN and SFAREGS should be used to set the value of the Roll Indicator and to designate which learner curriculum records are to be rolled to history (outcome).

When the curriculum is rolled, the outcome record is created (SHADEGR), and the learner curriculum inserted for the outcome. A new outcome is not created if a previous outcome exists that has not been awarded and has a curriculum record with the same level, degree, college, and program. In this case, the curriculum is rolled to the existing outcome.

The **Roll Learner** radio group choices on SOILCUR are Yes, No, or Default. The default value originates first from the setting of the **Primary (Indicator)** or the **Secondary (Indicator)** on SOACURR. If a curriculum has not been defined, the default value then

originates from the **Create or Update Outcome Record with Primary Learner Curriculum** radio group or the **Create or Update Outcome Record with Secondary Learner Curricula** radio group on SOACTRL.

- Select **Yes** to roll the learner record to academic history (outcome).
- Select **No** to not roll the learner record.
- Select **Default** to use the curriculum rules defined on SOACURR (**Primary** or **Secondary** checkboxes) and SOACTRL (**Create or Update Outcome Record with Primary Learner Curriculum** radio group or **Create or Update Outcome Record with Secondary Learner Curricula** radio group).

Note: All non-learner modules (Recruiting, Admissions, Academic History) will display a value of **No** in this field.

Grade Roll and Section Dates

Updated: August 27, 2020

Section start and end dates are rolled to academic history when an enrollment is rolled, regardless of whether the section is a CEU section.

When information is rolled to academic history either online using the Class Roster Form (SFASLST) or the Class Attendance Roster Form (SFAALST) or in batch using the Grade Roll to Academic History (SHRROLL), the section start and end dates are rolled.

- If the schedule type of the section permits assignment of a CRN to a co-op activity, and the CRN is assigned to a co-op for the term, the start and end dates for the co-op are rolled.
- If no co-op exists or the section's type does not permit the assignment of a CRN to a co-op activity, then the section dates are rolled.

Grade Roll and Components/Sub-components

Updated: August 27, 2020

The process will only roll components and sub-components when there is no value for the grade date. The grade update restrictions also apply to components and sub-components.

When a final grade is entered against an individual registration record, the grade date (SFRSTCR_GRDE_DATE) is not, as yet, updated. When SHRROLL is run in batch mode, those registration records containing a value in the **Final Grade** field (SFRSTCR_GRDE_CODE) and no value in the **(Grade) Date** are rolled to academic history. The existence of a date in this field prevents the batch grade roll process from performing any subsequent rolls to academic history. The presence of this date also prevents the final grade from being updated in either SFASLST or SFAALST.

The same grade update restriction is required for component and sub-component marks. Therefore, when the registration is rolled, the same date that is entered in the registration date field is also used to populate the roll date in the SHRMRKS, SHRCMRK, and SHRSMRK tables for the applicable student.

Grade Roll and Open Learning Courses/Part-of-Term

Updated: August 27, 2020

The start from and to dates are used to select all registration records in a range.

For traditional courses (which are assigned to a part-of-term), the part-of-term start date associated with the section is used to determine inclusion. For open learning courses, the start date of the original SFRAREG record for the student is used.

If you need to isolate a portion of a term for roll processing, enter either a valid term or a wildcard (%) to search all terms. The wildcard feature is only permitted if start from and to dates are also entered. In this instance, only registration records in a particular term matching the date range entered would be rolled.

Also, if a specific part-of-term is entered, records meeting the date requirements are rolled. A valid term must be entered to also have the associated part-of-term.

Term	Part-of-Term	Date Range	Results
Fall 2002			All graded registration records for the Fall 2002 term would be rolled.
Fall 2002	1		All graded registration records for the Fall 2002

Term	Part-of-Term	Date Range	Results
			term for sections assigned a part-of-term code of 1 would be rolled.
Fall 2002	%	01-SEP-2002 to 30-NOV-2002	All graded registration records with a registration start date between the date range (inclusive), for the Fall 2002 term, would be rolled.
%	1	01-SEP-2002 to 30-NOV-2002	Not permitted.
Fall 2002	1	01-SEP-2002 to 30-NOV-2002	All graded registration records for the Fall 2002 term for sections assigned a part-of-term code of 1 with a registration start date between the date range (inclusive) would be rolled.
%	%	01-SEP-2002 to 30-NOV-2002	All graded registration records with a registration start date between the date range (inclusive) would be rolled.

Open learning information is rolled from SFRAREG to SHRTCKN for the number of extensions processed for a registration record, the original start date from the first SFRAREG record, and the most recent expected completion date. The instructor assignment from the SFRAREG record is rolled and is displayed in the Instructor Information block on SHATCKN.

How Degree Attributes Move from Catalog to Academic History

Updated: August 27, 2020

1. Degree attributes are entered in the Catalog module (SCAETL).
2. A new schedule record is created in the Class Schedule module, and the catalog attributes populate the schedule attributes (SSAETL).

Note: This is the reason that degree attributes exist on the catalog record, so they can be defaulted into the schedule record.

3. A student registers for the section, and the section is graded and rolled to history.
4. For the first student that is rolled in the section, the schedule degree attributes are used to populate the history degree attributes (SHRATTC).
5. The History Course Section Attribute Table (SHRATTR), which is used in CAPP, is populated from SHRATTC.
6. Other students register for the section and have grades rolled. The contents of SHRATTC are used to populate the student's degree attributes.
7. You can view the rolled section degree attributes (SHRATTC) on SHADEGR and SHATCKN, although they are not updateable.
8. To customize the degree attributes on a student's record (SHRATTR), you can insert or delete data or do both from the SHRATTR block.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code representing the term for which grades are to be rolled.	Term Code Validation Form (STVTERM)
Start From Date	No	Enter the registration start range from date for the records to be rolled.	
Start To Date	No	Enter the registration start	

Parameter Name	Required?	Description	Values
		range to date for the records to be rolled.	
Part of Term	Yes	Enter the code representing the part of term for which grades are to be rolled. Multiple values allowed. Enter % for all parts-of-term.	Part of Term Code Validation Form (STVPTRM)
Course Reference Number	Yes	Enter the CRN of the course(s) for which grades are to be rolled. Multiple values allowed. Enter % for all courses.	
User ID	Yes	When grades are rolled into academic history, each entry for each student is associated with the user ID responsible for the roll. Enter that user ID.	
Report Mode	Yes	Enter A for Audit mode or U for Update mode. Audit mode does not update the database. It produces a list of errors that can be corrected before the roll is performed in Update mode and	A - Audit mode U - Update mode

Parameter Name	Required?	Description	Values
		the database is updated. If errors occur when Update mode is used, only the records for students with errors may not be completed by the process. API errors are listed as <i>APIERR</i> , a record type on SOTPRNT.	
Print Selection	Yes	Enter A ll to print all grades rolled or E rror to print only those grades which did not roll due to errors. An error will be generated if the substitute grade information is not correctly established on the database.	A - All E - Error
Grade Term	No	Enter the term in which the course was graded.	Term Code Validation Form (STVTERM)
Roll Long Section Title	Yes	Enter Y to roll the long section title from the syllabus or N to not roll the long section title. The default is N .	Y - Roll long section title N - Do not roll long section title

Calculate GPA Conversion Process (SHRCONV)

Updated: August 27, 2020

This process is used to calculate and store the campus GPAs by term and the level of the students.

It should be run before any of the other GPA calculation processes are executed. Academic History tables will be locked in exclusive mode to prevent problems from occurring while the process is running. Be certain no users are accessing Academic History before running this job. Due to the calculation of GPAs for all students in Academic History, this job may run for several hours.

No parameters are used with this process. The process is always run in Update Mode, and the GPAs are updated.

Calculate GPA Report (SHRCGPA)

Updated: August 27, 2020

This process is used to calculate the GPA for the selected term and group of students.

You can use population selection or you can select all students for the term, students whose histories have been rolled, or students whose information has been fed to a collector file. The process also calculates a student's GPA by student centric period, level, and type (institutional, transfer credit, and overall) for terms that are part of a student centric period.

Institutions can calculate the GPA by Study Path to allow users to view the GPA which applies towards a Study Path or outcome. The term and level GPA will be calculated for all the Study Paths for the selected term and group of students

Note: The GPA calculation by Study Path will be processed only if the **Process GPA by Study Path** check box is selected in the SHACTRL page.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the code representing the term for which the	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		report is to be run.	
Select All, Rolled, or Collector	Yes	Enter A to select all the students from the term, R to select only those students whose academic histories have been rolled, or C to select those students whose information has been fed to a collector file.	A - All students R - Rolled students C - Collector file students
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	

GPA Recalculation Report (SHRGPAC)

Updated: August 27, 2020

This process is used to recalculate the GPA for all terms for each student. When terms have been recalculated, then all levels for each student are recalculated.

Students may be selected for GPA recalculation using one of three methods:

- The user has previously created a population selection file.
- The user enters a term, and if no population selection file exists, and the user does not select individual students, all students enrolled in the term will be processed.
- The user will be prompted for individual student IDs.

The process also recalculates a student's GPA by student centric period, level, and type (institutional, transfer credit, and overall) for terms that are part of a student centric

period.

The recalculated GPA by Study Path is included in the SHRGPAC output file. The SHRGPAC output file displays the following:

- Along with the regular GPA calculation, the GPA calculation by Study Path is also printed
- The Study Path value displayed will be in the format that is configured in the Curriculum Rules Control (SOACTRL) page

Note: The GPA calculation by Study Path will be processed only if the Process GPA by Study Path check box is selected in the SHACTRL page. The Study Path calculations are not calculated for campus GPA and Student centric period and hence, the output file will print/display only the term GPA and level GPA for all the Study Paths registered by the student.

Parameter Name	Required?	Description	Values
Process Term	Yes	Enter the code representing the term for which the report is to be run.	Term Code Validation Form (STVTERM)
Student ID	No	Enter the student IDs which are to be processed for recalculation.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
Audit Trail Report Request	No	<p>Enter Y to request the production of an audit trail report. Leave Null to not produce the audit trail report.</p>	<p>Y - Audit trail</p> <p>Null - No audit trail</p>

Calculate Academic Standing Report (SHRASTD)

Updated: December 01, 2020

This process is used to calculate the academic standing for the selected term and group of students.

The process will also calculate the academic standing of students by their study paths for the selected term if an Institution has study path turned on in Curriculum Rules Control page (SOACTRL) and Academic History Control page (SHACTRL).

You should run this process after the Repeat/Equivalent Course Check Report (SHRRPTS) but before the Grade Mailer Report (SHRGRDE). Records are selected and processed for the term requested for students having an SHRGCOL record.

The academic standing process uses a student's displayed GPA rather than the stored GPA when determining their academic standing. For example, if a student's GPA is calculated to be 1.987821, that is the value that will be stored. However, if the institution's GPA display rules are set up to round the GPA to three digits, the displayed GPA would be 2.000, and that is the value the SHRASTD process will use to evaluate the student's academic standing.

When running the report to calculate either academic standing or Dean's List standing, only that status which has been selected to be calculated will be updated. If both academic standing and Dean's List standing are to be calculated, both will be updated. The Dean's list standing for students is not specific to study paths and that calculation will not take study paths into account even if study paths are enabled. To update minimum/maximum hours, academic standing must also be updated. To calculate minimum/maximum registration hours, the Calculate Academic Standing parameter must also be set to γ . The students are selected for this report only if the record exists on the Grade Mailer Status/Error Correction Form (SHAGCOL).

The process also calculates academic standing by student centric period for students with an active student centric period for the term. The student is considered to have an active student centric period for the term when the **Student Centric Period** field on SHAINST (or the column in the SHRTTRM table) has a valid value. The Academic Difficulty Rules by Student Centric Period window on SHAACST is used to maintain academic standing hours and GPA rules by student centric period.

When academic standing is evaluated for the student for the final term of the student centric period, the new standing is based on the institutional hours and GPA from all the

terms associated with the student centric period. When academic standing is evaluated for the student for an earlier term in the student centric period, the most recent, previous academic standing calculated before the student centric period will be assigned as the new standing.

For a student, for all terms before the final term in a student centric period, the academic standing is rolled forward from the student's most recent term that is before the start of the current student centric period. This permits registration restrictions and maximum hours calculations to remain in effect throughout the student centric period. When a student who has an active student centric period does not enroll in the final term of the student centric period, and academic standing is calculated for the final term, the student's standing is evaluated based on the student centric period GPA totals, but the academic standing is stored in the highest or maximum existing term header record for the student centric period.

Note:

- When a student does not have an active student centric period assigned, the existing term based rules from SHAACST are used for the evaluation of academic standing.
- A student's standing for a student centric period will not be calculated based on specific study paths.

When a student does not have an active student centric period assigned, the existing term-based rules from SHAACST are used for the evaluation of academic standing.

In the **Progress Evaluation Method Controls** section in SHACTRL, if you select the **Academic Standing and Progression Evaluation Method** option, the process runs as per the current functionality. If you select the **Structured Progression and Awards Method** option, if the evaluation term parameter value is less than the start term value, the process runs as per current functionality, and if the evaluation term parameter value is greater or equal to the start term value, an error message appears.

For Example:

- On running SHPPGAW job process for evaluation Term \geq 202001 the further evaluation of Stage GPA and Progression Outcome for the student is processed.
- On running SHPPGAW job process for evaluation Term \leq 202001, an error message appears on the .log file that the configurations are setup to run for Academic Standing and Progression Evaluation method, and not for Structured Progression and Awards process.

- On running SHRASTD or SHRPREV job process for evaluation Term <= 202001 term the current functionality is processed.
- On running SHRASTD or SHRPREV job process for evaluation Term >= 202001 term, an error message appears on the .log file that the configurations are setup to run for Structured Progression and Awards process, and not for Academic Standing and Progression Evaluation method.

Parameter Name	Required?	Description	Values
Term	Yes	Enter the code representing the term for which the report is to be run.	Term Code Validation Form (STVTERM)
Update Academic Standing	Yes	Enter Y to calculate the updated academic standing or N to not calculate the updated academic standing.	Y - Calculate academic standing N - Do not calculate academic standing
Update Dean's List Standing	Yes	Enter Y to calculate the updated Dean's List standing or N to not calculate the updated Dean's List standing.	Y - Calculate Dean's List standing N - Do not calculate Dean's List standing
Audit/Update Mode	Yes	Enter A for Audit mode to print a report of the calculated standings without updating the database or U for Update mode to update the records with the new standings.	A - Audit mode U - Update mode
Calculate Min/Max Registration Hrs	Yes	Enter Y to compare the hours for the new academic standing	Y - Compare hours N - No checking

Parameter Name	Required?	Description	Values
		codes to existing future registration. Enter N when no checking is needed.	
Pre-registration Future Term	No	Enter the future term registration to be compared to the new academic standing minimum/maximum registration hours.	Term Code Validation Form (STVTERM)
Min/Maximum Hours Update/Audit	No	Enter A to print an audit report of the updated minimum/maximum hours, without actually updating the database. Enter U to update the future term to the new minimum/maximum hours. The Audit/Update Mode parameter must also be set to U for update, if this parameter is set to U for update.	A - Audit updated hours U - Update future term
Update 'USER' Source New Value	Yes	Enter Y to override minimum/maximum hours, or N to not override minimum/maximum hours when the existing source for the hours from SFAMHRS is	Y - Override minimum/maximum hours N - Do not override minimum/maximum hours for source USER

Parameter Name	Required?	Description	Values
		USER.	
Process by Student Period	Yes	<p>Enter Y to calculate the academic standing for student centric periods or N to not calculate the academic standing. The default is N.</p> <ul style="list-style-type: none"> When this parameter is set to Y, the process considers students who are assigned to a cycle designator and student centric period using the rules for student centric period academic standing processing. When this parameter is set to N, any students who are not assigned to a cycle designator for the term are processed using baseline term academic standing 	<p>Y - Calculate academic standing for student centric periods</p> <p>N - Do not calculate academic standing for student centric periods</p>

Parameter Name	Required?	Description	Values
		<p>processing.</p> <ul style="list-style-type: none"> When this parameter is set to N, only baseline term academic standing processing is performed. 	
SCPs to be processed	No	<p>Enter the student centric periods to be processed for academic standing. Values should be valid for the term entered in the Term parameter. When the Process by Student Period parameter is set to Y, this parameter must be entered.</p>	Student Centric Period Term Control Form (SOASCPT).

Repeat/Equivalent Course Check Report (SHRRPTS)

Updated: August 27, 2020

The Repeat/Multiple Course Rules Form (SHARPTR) is used to define rules on handling grades and credits if students should exceed repeat limits when taking courses.

This process is run after the grade roll (SHRROLL) and before grade mailers (SHRGRDE) to check new courses rolled into history for repeats and equivalents. It will then look at the rules on SHARPTR to determine how they should be calculated into the student's record. Any course, including transfer courses, identified as a repeat or equivalent which should be excluded from the record's calculations of hours and GPA is accordingly

flagged with an E (for excluded) on the transcript. The report will sort the output of students in alphabetical order by last name.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the code representing the term for which repeat/equivalent checking is to be run.	Term Code Validation Form (STVTERM)
Level Code	Yes	Enter the level for which you want to run the report. Multiple values are allowed.	Level Code Validation Form (STVLEVL)
Report or Update	Yes	Enter R to process the report in Audit mode, or enter U to update the database with the results. After running in Update mode, the GPAs need to be recalculated using the Collector option in the Calculate GPA Report (SHRCGPA).	R - Report results in Audit mode U - Report results in Update mode and update the database
Print Transfer Work	Yes	Enter Y to print transfer work on the report. Enter N to not print transfer work on the report.	Y - Print transfer work N - Do not print transfer work
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		<p>none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be	

Parameter Name	Required?	Description	Values
		entered.	
User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Print Repeated Courses Only	Yes	<p>Enter Y to suppress printing of any courses that are not considered for repeat processing due to the repeat rules settings for the term being processed. Only repeated courses will be printed.</p> <p>Enter N to print all repeated courses, including those courses not considered as the result of the settings in the repeat rules for the term being processed. These courses will have associated</p>	<p>Y - Print repeated courses only</p> <p>N - Print all repeated courses and messages for non-repeated courses</p>

Parameter Name	Required?	Description	Values
		informational messages. The default is N.	
Reset Repeat Indicator	No	<p>Enter Y to remove all repeat indicator messages from the report and update repeat indicators. Enter N to run as an incremental process. The repeat indicators are not updated.</p> <p>For the term and level, if the SHARPTR rule is changed to reflect a new selection rule and evaluation grade, the SHATCKN repeat status is updated (include/exclude). After changes have been made on SHARPTR, if the SHRRPTS process is run again, the new repeat status on the report is updated, and the SHATCKN repeat statuses for the evaluated courses are updated.</p> <p>The default is N.</p>	<p>Y - Remove all repeat indicator messages</p> <p>N - Run as an incremental process</p>

Grade Mailer Report (SHRGRDE)

Updated: August 27, 2020

This process produces grade mailers for students for whom grades have been entered either manually or through the Grade Roll Process (SHRROLL).

The process should be run after the Grade Roll (SHRROLL), the Repeat Checking Process (SHRRPTS), the Calculate GPA Process (SHRCGPA), and after the Academic Standing Process (SHRASTD). Grade mailer status is maintained in the Term Header Block of the Term Course Maintenance Form (SHAINST). A grade mailer must be pending for persons selected through population selection for a grade mailer to be generated.

Four types of grade mailers exist:

- Original - produced as a result of a new institutional grade record created in academic history. When grades are rolled, original grade mailers are produced.
- Duplicate - requested through the Term Header Block of the Term Course Maintenance Form (SHAINST). Will produce a duplicate grade mailer.
- Mid-term - produced by entering mid-term grades through the use of the Class Roster Form (SFASLST). (Mid-term grades are not rolled to academic history.)
- Revised - produced as a result of grade change through the use of the Course Detail Information Form (SCADETL) from the Term Course Maintenance Form (SHAINST).

GPA and Academic Standing by Study Path

- The Academic Standing and GPA calculation by Study Path will be processed only if the **Process GPA by Study Path** check box is selected in the Academic History Control (SHACTRL) page.
- The Study Path column and the associated Study Path values associated with the courses will be printed only if the **Process GPA by Study Path** check box is selected in the Academic History Control (SHACTRL) page.
- Institutions can view the calculated GPA by Study Path in the SHRGRDE output report file.
- Institutions can view Academic Standing by Study Path in the SHRGRDE output report file.

Four types of grade mailers exist		
Produced as a result of a new institutional grade record created in academic history		
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Four types of grade mailers exist	
Requested through the Term Header Block of the Term Course Maintenance Form (SHAINST)	

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Four types of grade mailers exist	
	d e m a i l e r .
M i d - t e r m	N o
P r i n t E x p a n d e d Q u a l i t y P	Y e s

Four types of grade mailers exist

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Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code which represents the term for which grade mailers are to be run. Single value only.	Term Code Validation Form (STVTERM)
Grade Mailer Type	Yes	Enter the code representing the grade mailer(s) to be produced. Enter o for Original, D for Duplicate, R for Revised, or % for a combination of those three codes. Enter M for Midterm. The value M is not included in the % value. Single value only.	O - Original D - Duplicate R - Revised % - All three (O, D, R) M - Midterm
Print Academic Standing Y/N/O	Yes	Do you want academic standing to print on grade mailers? Enter Y to print the academic standing. Enter N to not print the academic standing. Enter o to print the	Y - Print standing N - Do not print standing O - Print override standing

Parameter Name	Required?	Description	Values
		override standing.	
Print Dean's List (Y/N)	Yes	Enter Y to print the Dean's List on the grade mailer or N to not print the Dean's List on the grade mailer.	Y - Print Dean's List N - Do not print Dean's List
Print Headings (Y/N)	No	Enter Y to print headings that identify the subject, course, section, title, etc. Enter N to not print the headings, such as when pre-printed forms are used that already contain column headings.	Y - Print headings N - Do not print headings
Address Selection Date	No	Enter the address effective for this date to be printed on the grade mailer in format DD-MON-YYYY. Leave this parameter blank to default today's date.	
Address Type	Yes	Enter the address type to be printed on the grade mailer. Multiple requests are permitted and must be entered in priority sequence. For example, 1MA 2PR will first print the	Address Type Code Validation Form (STVATYP)

Parameter Name	Required?	Description	Values
		mailing address, and if none is found, will print the permanent address.	
Level Code	Yes	Enter the level code representing the population for which grade mailers are to be run (single value only), or % may be entered for all.	Level Code Validation Form (STVLEVL)
Campus Code	Yes	Enter the campus code representing the campus for which grade mailers are to be run (single value only) or % may be entered for all.	Campus Code Validation Form (STVCAMP)
Campus Process Request	Yes	Enter a Y to indicate that a specific course campus will be used in processing the grade mailers. Enter N to indicate that no special course campus processing is to be used.	Y - Use specific campus N - No special campus used
Campus To Be Processed	Yes	Enter the course campus code representing the campus of the course for which grade mailers are to be run (single value	Campus Code Validation Form (STVCAMP).

Parameter Name	Required?	Description	Values
		only). This parameter is required if the Campus Processing Requested parameter is set to Y.	
Print Transfer GPA (Y/N)	No	Enter Y to have the students' transfer GPAs printed on the grade mailers. Enter N to prevent students' transfer GPAs from printing on the grade mailers. If this value is Null, the transfer GPA will not print on the grade mailers.	Y - Print transfer GPA N - Do not print transfer GPA
Term Description Print Option	No	Enter a Y to indicate that the full term description is to be printed on the grade mailer following the level description. Enter N to if you do not want the full term description to be printed on the grade mailer.	Y - Print full term description N - Do not print full term description
Print Ungraded Sections	Yes	Enter Y to print the ungraded sections on the grade mailer or N to not print ungraded sections.	Y - Print ungraded sections N - Do not print ungraded sections

Parameter Name	Required?	Description	Values
		<p>Ungraded sections will appear on the grade mailer after the list of graded courses.</p> <p>Only those courses with a course registration status that is gradable will print on the student's grade mailer.</p>	
Ungraded Section Indicator	No	Enter a value of up to three characters to print in the grade field of the ungraded sections (that is, UNG for ungraded courses). This is a free format field that is not validated against a validation form.	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		<p>entered.</p> <p>A person included in the population must meet all other grade mailer criteria to have a grade mailer produced. For example, if original grade mailers are requested and population selection is used, no mailer will be produced for people in the population who have no original grade mailer pending.</p>	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and</p>	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		application code entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
Print Expanded Fields (Y/N)	Yes	<p>Enter y to print a modified grade mailer with a five position course number and quality points in format 9999.99.</p> <p>Enter n to print the standard grade mailer. This is the default for the parameter.</p> <p>If pre-printed forms are used, be sure to test mailers with expanded field data before using this option for production runs.</p>	<p>Y - Print modified mailer</p> <p>N - Print standard mailer</p>
Sort by Name (N) or ZIP Code (Z)	No	<p>Enter N to sort the output by the student's last name.</p> <p>Enter z to sort the</p>	<p>N - Last name sort</p> <p>Z - ZIP code sort</p>

Parameter Name	Required?	Description	Values
		<p>output by the student's ZIP/Postal Code. The default is Z.</p> <p>Sorting by ZIP code sorts mailers first by nation description (if nation codes exist on the address), then by ZIP code in ascending order, and then alpha by last name order. Grade mailers with no address are grouped at the end, in alpha by last name order.</p>	
Print Expanded Quality Pts/GPA	Yes	<p>Enter Y to print quality points and GPA up to their maximum sizes. Enter N to print quality points as 999.99 and GPA as 9.99. The default is N.</p>	<p>Y - Expanded maximum quality points</p> <p>N - Regular quality points</p>

Student Type Update Report (SHRTYPE)

Updated: August 27, 2020

This process updates the existing student type for each learner that is maintained on the General Student Form (SGASTDN) to the next student type, which is maintained on the Student Type Code Validation Form (STVSTYP).

The process uses the rules on the Continuant Terms Rule Form (SOACTRM) to identify terms and student types which should be updated. For example, the next student type for a “new” student might be Continuing. An academic history record in the Term Course Maintenance Form (SHAINST) for user-specified terms will trigger the system to change the student type to the next status based on the fact that the student was enrolled.

This process also reviews all current and active curricula and processes the student type, if available, on the curriculum record (SORLCUR). It displays the learner curriculum sequence number for the learner curriculum that contains the status type that is selected by the update process. For example, if a student has a current and active curriculum for the processing term with a sequence number of 6 and a status type of A, and the SOACTRM rules determine that status type A moves to status type B for continuant term processing, then SHRTYPE is run with the Process Curriculum parameter set to Y, and SHRTYPE prints a learner curriculum sequence number of 6 in the column after the updated student type information. The process also copies the graduation application sequence number to the new curriculum record if the degree to which the curriculum was rolled has not been awarded.

Note: This process should be run after the Grade Roll to Academic History (SHRROLL).

The process has an option to use student centric period rules to determine student type. This allows you to update student type based on a student's enrollment in a student centric period, instead of enrollment by term. The student type in effect on the general student record (SBGSTDN) for the first term in the student centric period will be used for reporting for the duration of the student centric period.

Parameter Name	Required?	Description	Values
Rules Term	Yes	Enter the term code for which there must be academic history to be updated. This term should be the same as the key term on the Continuant Terms Rule Form (SOACTRM).	Term Code Validation Form (STVTERM)
Update Term	Yes	Enter the term code for which the new	Term Code Validation Form

Parameter Name	Required?	Description	Values
		student type should be effective.	(STVTERM)
Mode	Yes	Enter A (Audit mode) to print a report of all students affected, their current student type, and what would be changed, without actually updating their database. Enter U (Update mode) to update records with the next status.	A - Audit mode U - Update mode
Process Curriculum	No	Enter Y to process the student type for the learner curriculum record. Enter N to process only the student type for the general student record (SGBSTDN).	Y - Process student type for learner curriculum record N - Process student type for general student record
Process by Student Period	No	Enter Y to use student centric period rules when determining the student type or N to not use student centric period rules. The default is N. See notes below.	Y - Process student centric period rules N - Do not process student centric period rules
		<ul style="list-style-type: none"> When this parameter is set to Y and the student has a cycle designator (general 	

Parameter Name	Required?	Description	Values
		<p>student record) or student centric period (academic history record) in effect for the update term, the SOACSCP rules are used to evaluate whether the student type should be updated to the next student type defined on STVSTYP.</p> <ul style="list-style-type: none"> • When this parameter is set to Y and the student does not have a cycle designator or student centric period in effect for the update term, the SOACTRM rules are used to evaluate whether the student type should be updated to the next student type defined on STVSTYP. • When this parameter is set to N, the current SOACTRM rules are used, even if the student has a cycle designator or student centric period in effect for the update term. 	

Transcript Population Creation Process (SHRTPOP)

Updated: December 12, 2024

This process is used to select a population of students for whom you want to have the transcripts printed. Electronic transcripts can be sent in EDI or XML format.

When you use the population selection parameters, the record is only processed if the student in the population selection has an SHADEGR record that is effective for the term value entered in the Selection Term parameter. When you use the population selection parameters, the parameters for Student ID, Level(s), Advisor ID, Degree Code, Degree Status, Degree Graduation Date, College, and Major are bypassed.

Parameter Name	Required?	Description	Values
Purge Parameter	No	Enter Y if you want the population from the previous transcript purged if the selection file already exists. If you don't enter Y, and a population already exists, the run will be aborted. Enter N to not purge the population. The default is N.	Y - Purge previous transcript population N - Do not purge
Selection Term	No	Enter the code representing the term for which the report is to be run. Enter % to cause all students with any academic history to be selected. Students must be registered for the requested term and have some academic history (no specific term), or students must have academic history for the requested term. At least one of these conditions must exist for the student to be selected.	Term Code Validation Form (STVTERM)
Student ID	No	Enter the ID(s) for the selected student(s) for whom	

Parameter Name	Required?	Description	Values
		you want the transcript to run, or enter % or a Null value to select all the students.	
Level(s)	No	Enter the level(s) for which you want to run the transcripts, or enter % or a Null value to select all the levels.	Level Code Validation Form (STVLEVL)
Advisor ID	No	Enter the ID(s) number of the advisor(s) to whom the transcript is to be restricted, or enter % or a Null value if there are no restriction. Only those students assigned to the requested advisor(s) will be selected.	
Degree Code	No	Enter the degree code(s) for which the transcript is to run, enter % for all degree codes, or enter a Null value to bypass the degree code restrictions, so that degrees are not even considered.	Degree Code Validation Form (STVDEGC)
Degree Status	No	Enter the degree status(es) to which the transcript is to be restricted. Enter % to	Degree Status Validation Form (STVDEGS)

Parameter Name	Required?	Description	Values
		select all degree statuses, or enter a Null value if there are no restrictions.	
Degree Graduation Date	No	Enter the date after which the student must have graduated to receive a transcript.	
College	No	Enter the college code(s) for the transcript, or enter % or a Null value to select all the colleges.	College Code Validation Form (STVCOLL)
Major	No	Enter the major code(s) selected for the transcript, or enter % or a Null value to select all the majors.	Major, Minor, Concentration Code Validation Form (STVMAJR)
Transcript Type	No	Enter the type of transcript requested. If null, all transcript types are selected for processing. Enter % or a Null value to select a transcript displaying all data that may be printed on the Transcript Type Rules Form (SHATPRT).	Transcript Type Code Validation Form (STVTPRT)
Billing Term	No	Enter the term during which the student's transcript fee is to be billed. If no term is	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		entered, no transcript fee will be processed.	
Billing Code	No	Enter the detail code associated with the transcript fee for which the student is to be billed. If no code is entered, no charge is made.	
Billing Description	No	Enter a free-format description associated with the transcript fee.	
Billing Amount	No	Enter the amount the student is to be billed for the transcript.	
Issued to Institution Code	No	<p>This parameter is required for EDI use. Enter the institution code for the institution where the transcript will be sent.</p> <p>These institutions should be designated as EDI Capable on STVSGBI.</p>	Source/Background Institution Code Validation Form (STVSBGI)
Send Electronic	No	Use this parameter if you have the ability to send an electronic transcript.	<p>P - PESC/XML transcript</p> <p>E - EDI TS130 transcript</p>

Parameter Name	Required?	Description	Values
		Enter P to select the PESC/XML transcript format, E to select the EDI TS130 format, or N or blank to select the paper transcript format.	N - Paper transcript
Issued to Name	No	Enter the name of the person or department to whom the transcript was issued. When running through the Host, if a Null value is entered, the system will proceed to the In-Progress Term parameter.	
Issued Street 1	No	Enter the first line of the street address of the person or department to whom the transcript was issued.	
Issued Street 2	No	Enter the second line of the street address of the person or department to whom the transcript was issued.	
Issued Street 3	No	Enter the third line of the street address of the person or department to whom the transcript was	

Parameter Name	Required?	Description	Values
		issued.	
Issued City	No	Enter the city of the issued address.	
Issued State	No	Enter the state of the issued address.	State/Province Code Validation Form (STVSTAT)
Issued Zip	No	Enter the ZIP code for the issued address.	
Issued Country	No	Enter the country code for the country of the issued address.	Nation Code Validation Form (STVNATN)
In-Progress Term	No	Enter the cutoff term for future registration. Courses from history to selected term will be printed.	Term Code Validation Form (STVTERM)
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		<p>selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection	

Parameter Name	Required?	Description	Values
		parameters must be entered.	
Outcome Record Required	Y	Set the parameter to N so that the students in the population selection need not have a SHADEGR record. These students should have rolled at least one course in the academic history, but their learner curriculum records do not need to have been rolled to outcome. Apply this parameter exclusively when the procedure is run through a population selection.	<ul style="list-style-type: none"> Y - students should have at least one outcome (SHADEGR) record to be included in the transcript population N - students do not need outcome records to be included in the transcript population but must have courses in academic history.

Academic Transcript Process (SHTRTC)

Updated: September 28, 2023

This process is run to produce the Banner paper transcript from the system.

A transcript must have been requested through the use of the baseline Transcript Request Form (SHARQTC), Banner Student Self-Service transcript request processing, or a baseline transcript population for a transcript identified through the Transcript Population Creation Process (SHRTPOP), to be produced through this process.

SHARQTC sends the request to a collector file which is read by this process and then

printed. Transcripts may be produced for an individual with a pending request, or for all requests which have been sent to the collector file. The type of information that displays on the transcript is controlled by the transcript type specified on the request. The Transcript Type Rules Form (SHATPRT) is used to define the options and create the rules associated with the transcript type.

Note: The process checks the value in the `SHTRAN_TYPE` field. A `Null` value indicates the paper transcript should be printed. Values of `E` (EDI), `P` (PESC/XML), or `D` (PDF) are ignored, and a transcript is not printed if those electronic values exist.

The transcript also displays course history information and GPA totals by term within student centric periods. All terms with a specific student centric period on the term header record (SHRTTRM) are grouped between a student centric header line and student centric GPA statistics section on the report output. This allows an institution to provide totals for both the student centric period and terms within the student centric period. This information is displayed when the **Student Centric Period Statistics** check box is selected on the Transcript Type Rules Form (SHATPRT).

You can select continuous pagination or pagination by course level when printing transcripts for students with multiple levels of coursework. Page numbering can be reset for each course level, which is printed on a new Page 1. When the transcript type rule on SHATPRT is set to `Y`, regular continuous page numbering is used for the transcript. When the rule is set to `N`, pagination by course level is used.

SHTRTC can be used with eTranscripts processing. When a paper transcript is requested from the vendor, and the transcript order has been run, and the paper transcript has been generated in Banner, a record is inserted into the SHRTEOS table with a status of `FO - Offline Record Sent`. See the *eTranscripts Processing* section in the *Academic History* in the *Banner Student Use* content for more information on eTranscripts.

The Grade Code or the Grade Abbreviation is printed depending on the selection of the **Grade Abbreviation instead of Grade Code** check box in the **Transcript Type Rules (SHATPRT) page > Print Options** section.

- When the check box is selected and **Print Expanded Hours Formats** parameter is set to `N` while running the job process, then 3 characters Grade Abbreviation is printed.
- When the check box is selected and **Print Expanded Hours Formats** parameter is set to `Y` while running the job process then 6 characters Grade Abbreviation is printed.

- When the check box is clear the Grade Code is printed.

The printing of **Grade Abbreviation** on transcript supports all the file types, such as, .html, .xml, .dat, and .lis files.

The process checks for the **Hide in Transcripts** check box on the **Course Maintenance (SHATCKN)** page. A student's courses will not appear on the transcript when you run the process for the .lis and .pdf export files for a specific term if **Hide in Transcripts** check box for a course is selected.

The courses appear on the transcript if you clear the check box. The credit hours displayed on the transcript for the student will not have any impact based on the value of **Hide in Transcripts** check box and can be controlled by the **Repeat** or **System** fields on the SHATCKN page.

Parameter Name	Required?	Description	Values
Transcript Population File	No	<p>Enter Y if the population for which the transcript(s) are to be printed has previously been selected through the Transcript Population Process (SHRTPOP).</p> <p>Enter N if the population has not been pre-selected.</p> <p>The default is N.</p>	<p>Y - Population pre-selected by SHRTPOP</p> <p>N - Population not pre-selected</p>
ID and Seq as XXXXXXXXXX/000	No	<p>Enter % or a Null value to select all IDs and sequences.</p> <p>To select a specific ID, enter the nine</p>	

Parameter Name	Required?	Description	Values
		<p>character ID number (XXXXXXXXXX) for the student.</p> <p>Enter the three character sequence number (000) after the ID to select a specific transcript request. Multiple IDs may be entered.</p> <p>The default is %.</p> <p>The sequence number is derived from the Request (Number) field on the Transcript Request Form (SHARQTC). When multiple requests exist for a transcript, you may select the specific one you want by entering that sequence number after the student's ID.</p>	
<p>When SHRTRTC is run manually for an eTranscript request, the format XXXXXXXXXXXX/000 must be used, such as 12345/09, 123456789/01, or N00014401/11.</p> <ul style="list-style-type: none"> • Positions one through nine (XXXXXXXXXX) are available for the ID number. The ID number may not use the entire nine digits. It can be shorter than nine digits. • The next position (/) is a separator. This position will float, depending on the ID length. 			

Parameter Name	Required?	Description	Values
<ul style="list-style-type: none"> The next positions (000) are available for the sequence number or transcript request number. The transcript request number may not use all three positions. It can be shorter than three digits. These positions will also float based on the length of the ID and the position of the separator. 			
Transcript Type	No	Enter the type of transcript(s) requested. Enter % or a Null value to select all transcript types. The default is %.	Transcript Type Code Validation Form (STVTPRT)
Transcript Printer	No	<p>If a specific printer is requested, only those students requested through that printer will be printed.</p> <p>Enter % or a Null value to select all printers.</p> <p>The default is %.</p>	
Address Selection Date	No	Enter the date (format DD-MON-YYYY) for which you want to retrieve an active address record of the student for whom the transcript is being printed.	
Address Priority and Type	Yes	Enter the priority number and address type code (format 1MA) for the address selection.	

Parameter Name	Required?	Description	Values
Official Transcript Request	No	<p>Enter Y if the transcript request is official</p> <p>Enter N or a Null value if the request is considered unofficial.</p> <p>The default is N.</p>	<p>Y - Official request</p> <p>N - Unofficial request</p>
Campus Selection Indicator	No	<p>Enter Y if only the courses associated with the campus selected are to be printed. An N will include all course campus codes on the transcript.</p> <p>The default is N</p>	<p>Y - Print courses for selected campus</p> <p>N - Print courses for all campuses</p>
Campus Selected	Yes	(Required if Campus Selection Indicator is set to Y). Enter the course campus code representing the campus of the courses which are to be included on the transcript.	Campus Code Validation Form (STVCAMP)
Control Report	No	<p>Enter Y to generate a control report</p> <p>Enter N or a Null value to suppress printing of the</p>	<p>Y - Print control report</p> <p>N - Do not print control report</p>

Parameter Name	Required?	Description	Values
		control report.	
Page Alignment	No	Enter Y to generate one page of alignment N or a Null value to suppress alignment.	Y - Print with alignment N - Do not print with alignment
Run in Sleep/Wake Mode	No	Enter Y to begin the sleep/wake cycling for this process and printer or N to not use sleep/wake processing.	Y - Use sleep/wake N - Do not use sleep/wake
Enter Sleep Interval	No	Enter the time (in seconds) this process is to pause before resuming execution. The default is 60.	
Substitute In Progress Title	No	Enter the value that you would prefer to print on the transcript if the default title "IN PROGRESS WORK" is not desirable. A title of up to 30 alpha numeric characters may be entered.	
Sort Order	Yes	Enter the number that corresponds with the sort order for the transcript: 1 - College, 2 - Dept., 3 - Major, 4 - College,	1 - College 2 - Dept. 3 - Major

Parameter Name	Required?	Description	Values
		<p>Dept., Major, 5 - Name, 6 - Degree, Major.</p> <p>Sort options 1, 2, 3, 4, and 6 sort the information based on the first primary curriculum record (minimum priority number).</p> <p>The alpha sort option cannot be used for last name, first name, and then middle name, if the diploma or legal names are selected to be printed on the transcript. The last name is not separated from the first name in these two instances.</p>	<p>4 - College, Dept., Major</p> <p>5 - Name</p> <p>6 - Degree, Major</p>
Process rqsts awaiting grades?	Yes	<p>Use this parameter to process requests that learners want held until end of term grades are rolled to academic history. Enter Y to process requests waiting for end of term grades. Enter N to process requests that are not waiting for end of</p>	<p>Y - Process requests waiting for end of term grades</p> <p>N - Process requests that are not waiting for end of term grades</p>

Parameter Name	Required?	Description	Values
		term grades. The default is N.	
Process rqsts awaiting degrees?	Yes	Use this parameter to process requests that learners want held until their degrees are posted to SHADEGR. Enter Y to process requests waiting for degrees to be posted. Enter N to process requests that are not waiting for degrees to be posted. The default is N.	Y - Process requests waiting for degrees to be posted N - Process requests that are not waiting for degrees to be posted
Web Self-Service Options	No	Use this parameter to process requests that learners submitted through Banner Student Self-Service with Web self-service options selected.	Web Self Service Options Validation Form (STVWSSO)
Web Payment Options	No	Use this parameter to process requests that learners submitted through Banner Student Self-Service with Web payment options selected.	Web Payment Options Validation Form (STVWPYO)
Print Expanded Hours Formats	Yes	Enter Y to print the credit or points or both and GPA in the expanded format or N to not print using	Y - Print expanded formats N - Do not print

Parameter Name	Required?	Description	Values
		the expanded formats.	expanded formats
Print Expanded Issued To	Yes	Enter the number of characters to print for the Issued To field. The range is 30 - 185 characters. The text will wrap after the seventy-fourth character. The default is 30.	
Print Expanded Address	Yes	Enter the number of characters to print for the address. The range is 30-75 characters. The default is 30.	
Print Formatted Current Name	No	Enter the order in which the full name is printed. Values are <code>FMIL</code> (prints in first, middle, last name order) or <code>LFMI</code> (prints in last, first, middle name order). For example, a student's name is Jane Doe Smith. If the parameter is set to <code>LFMI</code> , the full name is printed as Smith, Jane Doe.	FMIL - First, middle, last name order LFMI - Last, first, middle name order

Academic Transcript Request Purge (SHPTRTC)

Updated: August 27, 2020

This process must be run to purge the Banner transcript requests from the system.

Transcript requests are defined as official, unofficial, or both. Within this criteria, several purge options are available. You can purge transcript requests by request date, level, or transcript type. A transcript must have been requested through the Transcript Request Form (SHARQTC) to be purged using this process.

Parameter Name	Required?	Description	Values
Report Term	No	Enter the term to be used in the heading of the report (has no effect on the purge).	
Option	Yes	Enter 1 to purge by date, 2 to purge by level, or 3 to purge by transcript request type.	1 - Purge by date 2 - Purge by level 3 - Purge by transcript request type
Official Determination	Yes	Enter Y if only official transcripts are to be purged; N if only unofficial transcripts are to be purged; or enter % if both types of transcripts are to be purged.	Y - Purge official transcripts N - Purge unofficial transcripts % - Both
Purge Date	No	If option 1 was selected in the Option parameter, enter date before which data will be purged.	
Purge Level	No	If option 2 was	Level Code

Parameter Name	Required?	Description	Values
		selected in the Option parameter, enter level from which data will be purged. Enter % to select all levels.	Validation Form (STVLEVL)
Purge Transcript Type	No	If option 3 was selected in the Option parameter, enter transcript type for which data will be purged.	Transcript Type Code Validation Form (STVTPRT)
EDI Transcript Purge Option	No	Enter Y to purge selected EDI transcripts by EDI transcript status. Enter N if no EDI transcripts are to be purged. Enter % to purge all selected EDI transcripts. The default is N.	Y - Purge by EDI transcript status N - Do not purge EDI transcripts % - Purge all selected EDI transcripts
EDI Transcript Status	No	This parameter is required if the EDI Transcript Purge Option parameter is set to Y. Enter the statuses of the EDI transcripts that are to be purged.	Electronic Status Code Validation Form (STVEDIS)
Mode	Yes	Enter A (Audit mode) to print a report of all transcript requests purged, without actually updating the database. Enter U (Update mode) to	A - Audit mode U - Update mode

Parameter Name	Required?	Description	Values
		update the database.	

Degree Status Update Report (SHRDEGS)

Updated: August 27, 2020

This report updates the existing degree status code to a new user-defined degree status.

Optionally, the student status maintained on the General Student Form (SGASTDN) may also be updated for a user-defined effective term. The process will push the field of study curriculum status to the new status based on values on STVSTST. This report may be run in Audit or Update mode.

Parameter Name	Required?	Description	Values
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
Report Term	Yes	Enter the code representing the term for which the report is to be run. This is the term that will be used in headers and student selection.	Term Code Validation Form (STVTERM)
Audit or Update Mode	Yes	Enter A for Audit mode to print a report of the degree statuses, without actually updating the database. Enter U (Update mode) to update records with the new degree	A - Audit mode U - Update mode

Parameter Name	Required?	Description	Values
		status. The default is A.	
Current Degree Status Code	Yes	Enter the current degree status code to be used in the selection for the report.	Degree Status Code Validation Form (STVDEGS)
New Degree Status Code	Yes	Enter the new degree status code to be applied to the selected degrees.	Degree Status Code Validation Form (STVDEGS)
Graduation Term	No	Enter the graduation term to be used in the selection. Multiple values may be entered. If entered, only those students whose graduation term matches the user entered term will be selected for the update. If blank, all graduation terms are processed.	Term Code Validation Form (STVTERM)
Graduation Year	No	Enter the year to be used in the selection. If blank, all years are processed.	Academic Year Validation Form (STVACYR)
Graduation Status	No	Enter the graduation status to be used in the selection. If blank, all graduation statuses are processed.	Graduation Status Validation Form (STVGRST)
Degree Code	No	Enter the degree code to be used in	Degree Code Validation Form

Parameter Name	Required?	Description	Values
		the selection. Multiple values may be entered. If blank, all degree codes are processed.	(STVDEGC)
Campus	No	Enter the campus code to be used in the selection. If blank, all campus codes are processed.	Campus Code Validation Form (STVCAMP)
Level	No	Enter the level code to be used in the selection. Multiple values may be entered. If blank, all levels are processed.	Level Code Validation Form (STVLEVL)
New Student Status	No	Enter the student status for updating if the student record is to be updated. If blank, no update of student status occurs. If a value is entered, and this value differs from the selected student's student status in the General Student module, a new General Student record will be created with the new student status for the student status effective term.	Student Status Code Validation Form (STVSTST)
Student Status Effective Term	No	Required, if the New Student Status	Term Code Validation Form

Parameter Name	Required?	Description	Values
		parameter has a value. Enter the new effective term if the student status is to be updated.	(STVTERM)

Academic Status Audit Process (SHRSASA)

Updated: June 16, 2022

This process populates existing data from the Institutional Course Maintenance Term Header Repeating Table (SHRTTRM) and the Student Base Table (SGBSTDN) for academic standing, progress evaluation and combined academic standing values to the Academic Status Term Audit Table (SHRACTA) and Academic Status Override Audit Table (SGRACOA).

Parameter Name	Required?	Description	Values
Start Term	Yes	Enter the start term code. Audit records will be created from this term.	Values come from the Term Code Validation form (STVTERM).
End Term	No	Enter the end term code. Audit records will be created until this term.	Values come from the Term Code Validation form (STVTERM).
Report Mode	Yes	Enter A for audit or U for update.	<ul style="list-style-type: none"> A - Run the report in audit mode. U - Run the report in update mode.

Commencement Report (SHRCOMM)

Updated: August 27, 2020

This report produces a list of students by degree award status code, their degrees, majors, and any institutional or departmental honors associated with the degree.

It prints by student in last name alpha order. The report prints students within a certain date range as specified in the parameters, and a graduation date must exist in the Graduation Date field on the Degrees and Other Formal Awards Form (SHADEGR) to be included in the report.

Parameter Name	Required?	Description	Values
Degree Status Code Selection	Yes	Enter the degree status code which represents the population for which the report is to be generated. Enter a single value only, or enter % for all.	Degree Status Code Validation Form (STVDEGS)
Graduation Begin Range	Yes	Enter the begin date for the date range for which the report is to be generated. Enter in format YYMM where Y=year and M=month. Enter month as 01 for January through 12 for December. The default value is 0000.	
Graduation End Range	Yes	Enter the end date for the date range for which the report is to be generated. Enter in format YYMM where Y=year and	

Parameter Name	Required?	Description	Values
		M=month. Enter month as 01 for January through 12 for December. The default value is 9999.	
Graduation Term Code Selection	No	Enter the graduation term code which represents the population for which the report is to be generated. Multiple values may be entered, or enter % for all.	Term Code Validation Form (STVTERM)
Graduation Year Selection	No	Enter the graduation year for which the report is to be generated.	Academic Year Validation Form (STVACYR)
Graduation Status Code	No	Enter the graduation status code which represents the population for which the report is to be generated. Multiple values may be entered, or enter % for all.	Graduation Status Validation Form (STVGRTS)
Print Graduation Holds	No	Enter Y to print students with active graduation holds. Leave Null to not print students with holds,	Y - Print students with holds Null - Do not print students with holds

Commencement Attendance Report (SHRCATT)

Updated: August 27, 2020

This report produces a list of attendees by ceremony type and term, in addition to information on cap, gown, and hood ordering, pickup, and return.

Parameter Name	Required?	Description	Values
Ceremony Type	Yes	Enter the ceremony type code which indicates the ceremony to be attended. Enter % for all ceremony types.	Ceremony Type Validation Form (STVCERT)
Term	Yes	Enter the term in which the ceremony will occur. Enter % for all term codes.	Term Code Validation Form (STVTERM)
Students, Non-Students, or All?	No	Enter s to print only students, N to print non-students, or leave Null to print all students and non-students.	S - Print students N - Print non-students Null - Print both
Print Cap/Gown/Hood Detail?	No	Enter y to print detail of cap, gown, and hood information for the attendees. Leave Null to not print the detail.	Y - Print cap, gown, hood detail Null - Do not print detail.
Print Cap/Gown/Order Totals?	No	Enter y to print totals of caps, gowns, and hoods ordered by the attendees. Leave Null to not print the totals.	Y - Print cap, gown, hood totals Null - Do not print totals
List All With No Cap/	No	Enter y to list only	Y - Print attendees

Parameter Name	Required?	Description	Values
Gown Information		those attendees with no cap, gown, or hood information available. Leave Null to not print attendees without this information.	without cap, gown hood Null - Do not print attendees without this information
List All With No Pickup Date	No	Enter Y to list only those attendees who have not picked up their order for cap, gown, or hood. Leave Null to not print attendees who have not picked up their items.	Y - Print attendees for non-pickup Null - Do not print non-pickup
List All With No Return Date	No	Enter Y to list only those attendees who have not returned their cap, gown, or hood. Leave Null to not print attendees who have not returned their items.	Y - Print attendees for non-return Null - Do not print non-return

Transfer Equivalency Catalog (SHRTECA)

Updated: August 27, 2020

This report provides a listing used to review the transfer courses entered for each institution.

Parameter Name	Required?	Description	Values
Report Term	Yes	Enter the term code which represents the term for which the	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		catalog is to be produced.	
Process Term	Yes	Enter the effective term for which the course catalog is to be viewed. A term of 9999999 will produce all effective terms.	Term Code Validation Form (STVTERM)
Institution to Process	No	Enter the institution code for which you want the transfer equivalency catalog created, or enter % to select all institutions in the database.	Source/Background Institution Code Validation Form (STVSBGI)
Program Code	No	Enter the selected program code for which you want to review the transfer equivalency catalog, or enter % to select all program codes.	
Level Code	No	Enter the level code for which you want to create the transfer equivalency catalog. Enter % for all levels.	Level Code Validation Form (STVLEVL)
Active/Inactive Indicator	No	Enter A to select only active catalog transfer courses, I to select only inactive catalog transfer courses or % to select all courses, active and inactive.	A - Active courses I - Inactive courses % - All courses

Parameter Name	Required?	Description	Values
		The default is %.	
Print Course Comments	No	Enter Y if you want the course comments printed in the Transfer Equivalency Catalog. Enter N to suppress the printing of the comments.	Y - Print course comments N - Do not print course comments
Print Equivalent Courses	No	Enter Y if you want the equivalent courses printed in the Transfer Equivalency Catalog. Enter N to suppress the printing of the equivalent courses.	Y - Print equivalent courses N - Do not print equivalent courses
Print Equiv Course Comments	No	Enter Y if you want the comments for the equivalent courses printed in the Transfer Equivalency Catalog. Enter N to suppress the printing of the equivalent course comments.	Y - Print equivalent course comments N - Do not print equivalent course comments

Transfer Equivalency Worksheet (SHRTAEQ)

Updated: August 27, 2020

This worksheet is used to review the Transfer Equivalency information for a student.

Parameter Name	Required?	Description	Values
Report Term	Yes	Enter the term code	Term Code

Parameter Name	Required?	Description	Values
		which represents the term for which the report is to be run.	Validation Form (STVTERM)
Selected Student ID Number	Yes	Enter a specific student ID(s) for which the worksheet is to be created, or enter % to run the worksheet for all students for the selected term.	
Selected Transfer College	Yes	Enter the college(s) for which you want the transfer equivalencies worked out for the student(s), or enter % for all the colleges for the student(s).	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
Application Code	No	Enter the code that identifies the general area for which the selection identifier	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		<p>was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	

Transfer Articulation Purge (SHPTAEQ)

Updated: August 27, 2020

This process is used to purge the transfer articulation information for a student. The user may want to purge this information for those students who do not register or attend class.

Parameter Name	Required?	Description	Values
Report Term	Yes	Enter the term code	Term Code

Parameter Name	Required?	Description	Values
		which represents the term from which the transfer articulation information is to be purged.	Validation Form (STVTERM)
Purge ID	No	Enter an ID for which the purge is to be processed, or enter % or a Null value to select all students with no registration.	
Purge Institution	No	Enter an institution within a selected population for which the purge is to be processed. Enter % or a Null value to select all institutions. Valid values should be selected from the Source or Background Institution Base Form (SOASBGI).	Source or Background Institution Base Form (SOASBGI)
Run Mode	Yes	Enter A (Audit mode) to print a report of all transfer articulation request information which will be purged, without actually updating the database. Enter U (Update mode) to update the database.	A - Audit mode U - Update mode

IPEDS First Time Residency Report (SHRIRES)

Updated: December 14, 2023

This report is used to report all students who are first time students, by state, which is determined by the students' address type.

Students are counted in the HS Grad/Year column if they have a high school graduation date on the High School Information Form (SOAHSCH) that falls within the user-specified parameter dates.

Note: The IPEDS File Generation Process Report (SHRIPDS) must be run before this report, as it produces the IPEDS Extract File used in this report.

Web upload for SHRIRES

Updated: September 28, 2023

The Report Format parameter is used to create hardcopy output only, a comma-delimited file only, or both formats during the same run. This comma-delimited file format conforms to the NCES requirements for the creation of the Key Pair Value file.

The Report Format parameter is required.

- Enter 1 to produce hardcopy output.
- Enter 2 to produce output in a Web upload file format.
- Enter 3 to produce both formats.

3 is the default.

Note: When running this report from job submission, the Web upload file name will be in the format `shrires_#####.txt`, where ##### is the run sequence number.

Parameter Name	Required?	Description	Values
Report Term	Yes	Enter the term code representing the term for which the report is to be run. For report heading	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		only.	
HS Graduation From Date	Yes	<p>Enter the beginning date range for graduation for students who are to be counted in report.</p> <p>The system is looking for a high school graduation date on SOAHSCH, the High School Information Form. Any person who has a graduation date between the from and to dates will be counted in the HS Grad/Year column of the report.</p>	
HS Graduation To Date	Yes	<p>Enter the end date range for graduation for students who are to be counted in report.</p> <p>The system is looking for a high school graduation date on SOAHSCH, the High School Information Form. Any person who has a graduation date between the from and to dates will be</p>	

Parameter Name	Required?	Description	Values
		counted in the HS Grad/Year column of the report.	
Address Selection Date	Yes	Which address, effective on this date, do you want to use for residency reporting? Leave blank for today or enter in date format DD-MON-YYYY.	
Address Type	Yes	<p>Enter the address type to be used in determining the residency status of the student (the state code is what the system is looking for). Multiple requests are permitted and must be entered in priority sequence.</p> <p>For example, 1MA 2PR will first print the mailing address, and if none is found, will print the permanent address.</p> <p>Enter each parameter then hit return for the next prompt. Returning</p>	Address Type Code Validation Form (STVATYP)

Parameter Name	Required?	Description	Values
		with a null value will move you on to parameter 06. If a student doesn't have the specified address type(s), the state of residence will be reported as unknown.	
Report Format	Yes	<p>Enter 1 to produce hardcopy output.</p> <p>Enter 2 to produce output in a Web upload file format.</p> <p>Enter 3 to produce both formats.</p> <p>3 is the default.</p>	<p>1 - Hardcopy output</p> <p>2 - Web upload file</p> <p>3 - Both</p>

IPEDS Total Activity Report (SHRIACT)

Updated: September 28, 2023

In the SHRIACT report, both credit hours attempted in a 12-month period and unduplicated headcount of students are generated in the grand totals for the report. All students with at least one course recorded for credit will be counted for the period specified by the parameters.

This report looks at the information maintained in Academic History, not in Registration. Therefore, if a course has not yet been rolled to history, it will not be reported. For each course that falls within the period specified by the parameters, total credit hours and contact hours will be reported in the grand totals. If there is no enrollment in a course, the course will not be reported in the grand totals.

Note: Race/ethnicity categories that have been optional from Fall 2008 are now required for 2012-2013 reporting.

This report is used with student centric period processing. You can enter multiple values in the Effective Terms of Fall Cohort parameter and the Retention Terms of Fall Cohort parameter. This allows your institution to process multiple effective terms and multiple retention terms by student centric period.

Contact hours are calculated by adding the term contact hours together (lecture, lab, and other hours), as defined on the Basic Course Information (SCACRSE) page, and by multiplying that number by the number of students enrolled in the course, and multiplying the number of weeks.

Contact Hours = (Lecture Hours + Lab Hours + Other Hours) x number of students enrolled in course x number of weeks

The unduplicated headcount is calculated by taking those students who have at least one degree credit course in their academic history record (SHACRSE). Students are reported according to their student level. If a student has more than one level during a year, the student is counted by the level the student is in the last term of the report, based on the user-defined parameters.

Beginning with the Fall 2007 submissions, the Unduplicated Count and Instructional Activity data is collected in the Fall. To generate the report for the Fall, run SHRIACT with the parameters used for first-year retention data set to `Null`, thus producing no retention data. These parameters are: Effective Term of Fall Cohort, Retention Term of Fall Cohort, Full-time Fall Cohort Code, and Part-time Fall Cohort Code.

The First Year Retention Rate will be collected in the Winter (optional) and Spring submissions beginning in 2008. The actual cohort values and number of exclusions will be reported, and the retention percentages will be calculated by the NCES system. To generate the report for the Winter and Spring, run SHRIACT with the first-year retention parameters populated with your institution's values to produce the first year retention data. These parameters are: Effective Term of Fall Cohort, Retention Term of Fall Cohort, Full-time Fall Cohort Code, and Part-time Fall Cohort Code.

Note: You need to include any level codes that were formerly used for First-Professional in the list of level codes for Graduate.

Multiple values can be entered in the Effective Terms of Fall Cohort parameter and the Retention Terms of Fall Cohort parameter. This allows your institution to process multiple

effective terms and multiple retention terms by student centric period.

FTE Calculation

Updated: August 27, 2020

Graduate level credit hour activity and Doctor Degree Professional credit hours and FTEs are reported in Part B - Instructional Activity.

Because the NCES collects the FTE for the Doctor's Degree Professional practice separately, and each institution has a different method for calculating an FTE, and Banner does not calculate FTEs while producing the total activity data, users need to manually calculate the FTE on the form for this piece of data. To assist users in reporting the FTE for the Doctor Degree - Professional Practice, the report calculates and uploads the total credit hour activity. When the data is uploaded, the user needs to make the FTE calculation, or alternatively, revise the Web upload value before performing the upload.

SHRIACT separates out the credit hour activity for students at the graduate level whose degrees use the STVACAT code of 45 (Doctor's Degree - Professional). The raw total value of all the credit hour activity is reported in the Web upload file for the purpose of manually calculating the FTE for these courses.

The calculation used is: Credit Hour Activity of a Course = Course Credit Hour Value * Number of Students Enrolled for Credit.

This value is not an FTE value. It is reported only for this segment of the graduate level hours.

When SHRIACT is run, an RDOCFTE field is passed in the Web upload file. It contains a number that represents the total of the credit hour activity for STVACAT level 45 students. This is not the FTE calculation. You will still need to convert this raw credit hour value to an FTE value, based on how FTEs are calculated at your institution. You can either perform the calculation and then edit the Web upload file or upload the value and manually convert it on the form.

For example:

UNITID=123456, SURVSECT=E1D, PART=B, CREDHRSU=23100., CONTHRS=3700., CREDHRSG=12
RDOCFTE=160

You can either perform the calculation and then edit the Web upload file or upload the

value and manually convert it on the form.

Here is an example of this scenario.

- You have ten students working at the Doctor's Degree - Professional level.
- Ten students, with each student in four, four credit hour courses, equals 160 total credit hour activity.
- The FTE calculation is based on a semester, 4-1-4 plan, or other calendar type.
- The FTE calculation is: Graduate total credit hour activity divided by 24.
- (FTE calculations for different institutional practices are available on the NCES/IPEDS reporting website.)
- You must convert the 160 credit hour total activity to $160/24 = 6.667$.
- Do not leave the `RDOC_FTE` value as passed in the Web upload file.

File Parts for Reporting

Updated: September 28, 2023

The SHRIACT Web Upload File contains three parts: A, B, C, and D.

- *Part A* — Unduplicated Count by Student Level, Gender, and Race/Ethnicity.
Part A is used for reporting of student by Race/Ethnicity and Gender, based on the following Student Level table:
Undergraduate is further divided into the following categories:
 - 1 — Full-time, first-time degree/certificate-seeking undergraduate
 - 2 — Full-time, transfer-in degree/certificate-seeking undergraduate
 - 3 — Full-time, continuing degree/certificate-seeking undergraduate
 - 7 — Full-time, non-degree/certificate-seeking undergraduate
 - 11 — Full-time graduate
 - 15 — Part-time, first-time degree/certificate-seeking undergraduate
 - 16 — Part-time, transfer-in degree/certificate-seeking undergraduate

- 17 — Part-time, continuing degree/certificate-seeking undergraduate
- 21 — Part-time, non-degree/certificate-seeking undergraduate
- 25 — Part-time graduate
- *Part B* — Instructional Activity and Full-Time Equivalent Enrollment. Reports the total clock hour activity or the credit hour activity or both activities attempted during the 12-month period.
- *Part C* — Distance Education. Reports the number of undergraduate degree/certificate-seeking, undergraduate non-degree/certificate-seeking, and graduate students on the following criteria:
 - Enrolled exclusively in distance education courses
 - Enrolled in at least one but not all distance education courses

When either the Campus Code, Schedule Type, or Instructional Method or all of those parameters are used, distance education is processed for reporting. SHRIACT looks at the SSBSECT tables where the courses contain one of the report parameter values for schedule type, instructional method, or campus. If all the student's courses being processed contain one of those codes (campus, schedule type, instructional method), the student is flagged as being exclusively enrolled in distance education. If some, but not all, of the courses for the student contain the codes selected, the student is flagged as being enrolled in some distance education. Refer to the table in *Web upload for SHRIACT* to see details of the parameters used.
- *Part D* — 12-month enrollment. Reports on the Gender X (non-binary) with separate counts for undergraduate and graduate students based on the following criteria:
 - If the student's IPEDS gender = *N* and that student is an undergraduate student, then the student is added into the *undergrad not known* count
 - If the student's IPEDS gender = *N* and that student is a graduate student, then the student is added into the *grad not known* count
 - If the *Report another gender?* parameter = *N*, then the count = -2 (negative 2)
 - If the student's IPEDS gender = *X*, that student is an undergraduate student, and if the parameter, *Report another gender undergrad?* = *Y*, then the student is added into the *undergrad another gender* count
 - If the student's IPEDS gender = *X*, that student is a graduate student, and if the parameter, *Report another gender grad?* = *Y*, then the student is added into the *grad another gender* count

Web upload for SHRIACT

Updated: December 14, 2023

The report produces a control page with the parameter values and the number of records processed, and a comma-delimited file for the Web upload. This comma-delimited file format conforms to the NCES requirements for the creation of the Key Pair Value file.

Note: When running this report from job submission, the Web upload file name will be in the format `shriact_#####.txt`, where ##### is the run sequence number.

The SHRIACT Temporary Table (SHRTACT) is used internally within SHRIACT to accumulate data for the Web upload file creation. When the process is completed, the contents of this table are deleted.

Parameter Name	Required?	Description	Values
Start Date of Report Period	Yes	Enter the first day of the 12-month period covered by the report. Enter in date format, DD-MON-YYYY.	
End Date of Report Period	Yes	Enter the last day of the 12-month period covered by the report. Enter in date format, DD-MON-YYYY.	
Undergraduate Level Code	Yes	Enter the undergraduate level to be shown on the report. Multiple values may be entered.	Level Code Validation (STVLEVL) page
Graduate Level Code	No	Enter the graduate level to be shown on the report. Multiple values may be entered.	Level Code Validation (STVLEVL) page

Parameter Name	Required?	Description	Values
No Longer Used (Professional Level Code)	Inactive, do not use	Values entered in this parameter will not be processed.	
Effective Terms of Fall Cohort	No	<p>Enter the cohort effective term for report Part G.</p> <p>Multiple term values can be entered to process multiple effective terms and multiple retention terms by student centric period.</p>	<p>Term Code Validation (STVTERM) page</p> <p>Note: These parameters were used for Part G, which is no longer being produced.</p>
Retention Terms of Fall Cohort	No	<p>Enter the cohort retention term for report Part G.</p> <p>Multiple term values can be entered to process multiple effective terms and multiple retention terms by student centric period.</p>	<p>Term Code Validation (STVTERM) page</p> <p>Note: These parameters were used for Part G, which is no longer being produced.</p>
Full-time Fall Cohort Code	No	Enter the full-time, first-time, cohort code for report Part G.	<p>Cohort Code Validation (STVCHRT) page</p> <p>Note: These parameters were used for Part G, which is no longer being produced.</p>
Part-time Fall Cohort	No	Enter the part-time,	Cohort Code

Parameter Name	Required?	Description	Values
Code		first-time, cohort code for report Part G.	Validation (STVCHRT) page Note: These parameters were used for Part G, which is no longer being produced.
No Longer Used (Report Format)	Inactive, do not use	Values entered in this parameter will not be processed.	
Full-Time Undergraduate Hours	Yes	Number of credits which constitute full-time undergraduate.	Enter full-time graduate hours
Freshman Class Code		Enter freshman class code.	Class Code Validation (STVCLAS) page
Freshman Credit Hour Limit	Yes	Limit of credit hours from first term to find classification.	Enter freshman credit hours
1st Time Freshman Student Type	Yes	Enter 1st time freshman type for a student. Validated against STVSTYP.	Student Type Code Validation (STVSTYP) page
Transfer Student Type	Yes	Enter transfer student type.	Student Type Code Validation (STVSTYP) page
Undergraduate Category	Yes	Enter undergraduate category type.	Degree Award Category Code Validation (STVACAT) page
Campus Code		Enter campus type.	Campus Code Validation (STVCAMP) page
Schedule Type		Enter schedule type.	Schedule Type Code

Parameter Name	Required?	Description	Values
			Validation (STVSCHD) page
Instructional Method		Enter instructional method.	Instructional Method Validation (GTVINSM) table
Create Detail File		Enter detail file type.	Enter Y to create student detail file.
Report another gender undergrad?	Yes	Identifies if your institution able to report another gender for undergraduate.	Enter Y if it can report or enter N if it cannot report another gender.
Report another gender grad?	Yes	Identifies if your institution able to report another gender for graduate.	Enter Y if it can report or enter N if it cannot report another gender.
Full Time Graduate Hours	Yes	Number of credits which constitute full-time graduate.	Enter full-time graduate hours
Student Attributes to Exclude	No	Enter student attribute(s) to exclude from reporting	Student attribute validation page (STVATTS)

IPEDS Completion Report (SHRICIP)

Updated: August 27, 2020

The SHRICIP report provides degree and award information on degrees conferred by the institution within the user-specified time frame. These degrees are broken down by degree level.

Only degrees with a degree status on the Degree Status Code Validation Form (STVDEGS) with an **Awarded Indicator** of A (for awarded) are reported are included in the Web upload file.

The following degree award categories are included:

Award Category in Banner (STVACAT)	Description	IPEDS Equivalent
21	Less than one year certificate (less than 300 clock hours)	1A
21	Less than one year certificate (300-899 clock hours)	1B
22, 25	At least one but less than four-year certificate	2, 4
23	Associate's Degree	3
24	Bachelor's Degree	5
41, 43	Post Baccalaureate and Post Master's Certificate	6, 8
42	Master's Degree	7
44, 45, 46	Doctor's Degree	17, 18, 19

Note: All designated CIP Codes are included in the file.

The following age categories are used:

- Under 18
- 18-24
- 25-39
- 40 and above
- Age unknown

The report also indicates whether the program is available to be completed entirely through distance education. This information is collected by the CIP code and award level.

The report is split to provide count of certificates of less than one academic year in length into two award level categories as follows:

- Post-secondary award, certificate, or diploma of (less than one academic year):
 - less than 300 clock hours, or
 - less than 9 semester or trimester credit hours, or
 - less than 13 quarter credit hours
- Post-secondary award, certificate, or diploma of (less than one academic year):
 - 300-899 clock hours, or
 - 9-29 semester or trimester credit hours, or
 - 13-44 quarter credit hours

File Parts for Reporting

Updated: September 28, 2023

The SHRICIP Web Upload File contains five parts: A, B, C, D, and E.

Part A: Completions — CIP Data

This section produces specified CIP data for the degree award categories.

Part B: Completions — Distance Education

This section is used to report whether the CIP code and award level are being reported for a distance education program. On the Completions form, check boxes with values of **All**, **Some**, and **None** are used for this determination. (The field label is **This program is offered as a distance education program**.) SHRICIP will produce the web upload file with this field set to 2. However, you can remove this value from the web upload file if having it set to 2 is not useful.

Note: SHRICIP passes a value that sets this field to 2 for all CIP codes being reported. You must manually change those records that qualify as distance education.

This determination of what constitutes distance education will vary from institution to institution. Banner does not contain a specific field for this data or a rule for degree completion that specifies if a degree with a CIP code and level qualifies as distance education.

When setting the check box, consider the following information from the NCES:

1. All programs in this CIP code in this award level can be completed entirely through distance education.
2. None of the programs in this CIP code in this award level can be completed entirely through distance education.
3. Some programs in this CIP code in this award level can be completed entirely through distance education.

Part C – All Completers

This section reports totals for all completers by race and gender.

Note: Each student is only counted one time even if the student is awarded multiple times.

Part D – Completers by Level

This section reports all completers by level, race/ethnicity, and gender. It includes a field for the number of students who are completers, based on their age at the time the degree/certificate was awarded.

- If the student's race/ethnicity is unknown, the student is counted in the race/ethnicity unknown grouping.
- If the student does not have the gender populated, the student's degree is not counted.
- If the student does not have an age calculated, the student is counted in the age unknown grouping.

The age at time of completion is calculated as the difference between the graduation date in the degree record on SHADEGR (degree sequence number for the curriculum with the major for the degree) and the student's date of birth.

If completions have been reported in a prior reporting year, and no completions exist for that CIP code in the current year, and the program is still offered at the same award level, the record must be submitted using zeros.

Note: The file produced by SHRICIP will not produce any data for CIP codes when no

completions exist for the date range in which the report is run. These records will need to be manually updated.

Part E – Completion

This section reports on the Gender X (non-binary) with separate counts for undergraduate and graduate students.

Here is the logic for reporting on another gender or an unknown gender:

- If your institution is able to report another gender for undergraduate students, meaning gender information is known but does not fall into either of the two mutually exclusive binary categories (men or women), then *CGU01* = 1 (yes). You can then provide a *CGU011* value between 0 to 999999 to identify this new gender type.
- If your institution is not able to report another gender for undergraduate students, meaning gender information is known but does not fall into either of the two mutually exclusive binary categories (men or women), then *CGU01* = 2 (no). You can then enter a value of -2 or leave the value blank.
- If your institution is able to report another gender for graduate students, meaning gender information is known but does not fall into either of the two mutually exclusive binary categories (men or women), then *CGU02* = 1 (yes). You can then provide a *CGU021* value between 0 to 999999 to identify this new gender type.
- If your institution is not able to report another gender for graduate students, meaning gender information is known but does not fall into either of the two mutually exclusive binary categories (men or women), then *CGU02* = 2 (no). You can then enter a value of -2 or leave the value blank.

Completers by Level

Completers level in Banner (STVACAT)	Description	IPEDS Equivalent
21	Less than one year certificate (less than 300 clock hours)	8
21	Less than one year certificate (300-899 clock hours)	9

Completers level in Banner (STVACAT)	Description	IPEDS Equivalent
22, 25	At least one but less than four-year certificate	2, 4
23	Associate's Degree	3
24	Bachelor's Degree	5
41, 43	Post Baccalaureate and Post Master's Certificate	6, 8
42	Master's Degree	7
44, 45, 46	Doctor's Degree	17, 18, 19

Web upload for SHRICIP

Updated: September 28, 2023

The report produces a control page with the parameter values and the number of records processed, in addition to a comma-delimited file for the Web upload. This comma-delimited file format conforms to the NCES requirements for the creation of the Key Pair Value file.

The Web upload is processed as follows:

- For the first major (MAJORNUM1), the report reflects those students who have completed their studies toward a particular certificate or degree and have been denoted as awarded (SHRDGMR_DEGS_CODE is set to AW) in Academic History. (These translate to NCES Award Levels 1, 2, 3, 4, 5, 6, 7, 8, 9, 17, 18, 19.)
- For the second major (MAJORNUM2), file entries are created for students who have been awarded an Associate Degree, Bachelors Degree (or equivalent), Masters Degree, or Doctoral Degree. (These translate to NCES Award Levels 3, 5, 7, 17, 18, 19.) The second degree can be recognized by the secondary major in the curriculum record.

Note: When running this report from job submission, the Web upload file name will be in the format `shricip_#####.txt`, where ##### is the run sequence number.

Parameter Name	Required?	Description	Values
Report Term	No	Enter the term code representing the term for which the report is to be run. Used in report heading only.	Term Code Validation (STVTERM) page
Degree From Date	Yes	Enter the beginning date range for the graduation date (maintained on SHADEGR, the Degrees and Other Formal Awards Form) for the population to be reported.	
Degree To Date	Yes	Enter the end date range for the graduation date for the population to be reported.	
No Longer Used (Foreign Campus Code)		Inactive, do not use	Values entered in this parameter will not be processed.
No Longer Used (Break by 1st Two CIP Positions)		Inactive, do not use	Values entered in this parameter will not be processed.
No Longer Used (Break by Entire CIP Code)		Inactive, do not use	Values entered in this parameter will not be processed.
No Longer Used (Report Format)		Inactive, do not use	Values entered in this parameter will not be processed.
Program	No	Allows multiple programs to be added. Validates	Program Validation (SMRPRLE) page.

Parameter Name	Required?	Description	Values
		against SMRPRLE. Optional field.	See the notes following this table for more details on how the Program parameter is used.
Major	No	Allow multiple Majors to be added. Validates against STVMAJR. Optional field.	Major Validation (STVMAJR) page See the notes following this table for more details on how the Major parameter is used.
Create Detail File	Yes	Will default to 'N'.	<ul style="list-style-type: none"> Y - For valid values set the parameter to 'Y' to create detail file. N - Normal format
Another gender for undergrad?	Yes	Identifies if your institution able to report another gender for undergraduate.	<ul style="list-style-type: none"> Y - Yes (able to report another gender) N - No (not able to report another gender)
Report another gender grad?	Yes	Identifies if your institution able to report another gender for graduate.	<ul style="list-style-type: none"> Y - Yes (able to report another gender)

Parameter Name	Required?	Description	Values
			<ul style="list-style-type: none"> N - No (not able to report another gender)

Notes on Program and Major parameters

The Program and Major parameters are used to separate Post-secondary award, certificate, or diploma of (less than one academic year) into two levels – 'Less than 1-year certificates (less than 300 clock hours)' and 'Less than 1-year (300-899 clock hours)'. Both Levels have award category 21.

The following rules apply here:

1. The student's degree record data is matched against either **Program** or **Major** parameters – depending on the user input.
2. If the student's degree Program or Major matches with the parameter **Program** or **Major**, the student falls into Completers level 1, that is 'Less than 1-year certificates (less than 300 clock hours)', else into '2-less than 1-year (300-899 clock hours)'.
3. If both Program and Major parameters are not entered, all the students who have a award category of 21 will be counted against award level 1b less than 1-year (300-899 clock hours).
4. If a student has a degree record without a program; in this case, if parameter **Major** is entered the logic compares based on major code as explained above. But if the institution has entered a program code, and the student does not have one, then the logic counts the student in the category for less than 1-year (300-899 clock hours).

Parameter **Create Detail File** is used to produce a csv/excel file to show a user detailed list of student information (like Student ID, Award level, Race, Sex etc.) that would be included as Counts within the SHRICIP Web Upload file.

IPEDS File Generation Process (SHRIPDS)

Updated: September 28, 2023

This extract process allows you to select the parameters used to run the IPEDS Summary by Age Report (SHRIAGE), the IPEDS Race/Ethnic Status Report (SHRIETH), and the IPEDS First Time Residency Report (SHRIRES).

A file of individual and communal statistics is created which is used by SHRIAGE, SHRIETH, and SHRIRES. SHRIPDS, which creates a table, must be run before running any of these reports. A control report, which lists the parameters used, is also produced from this process.

These three reports retrieve data needed for the Fall Enrollment Report:

Report	Part	Description
SHRIETH	Parts A and D	Enrollment Summary by Racial/Ethnic Status
	Part E	All Completers - Gender Unknown or Another gender than Men/Women
	Part G	Enrollment Summary by Distance Education
SHRIAGE	Part B	Enrollment Summary of Students by Age
SHRIRES	Part C	Enrollment Summary by First-Time Residency (Freshman)

A population of students is selected by SHRIPDS using the following criteria:

- Student is validly registered for the term being processed.
- Student has a general student record with an effective term that is less than or equal to the term being processed and which has a degree code that is valid on the Degree Code Validation Form (STVDEGC).

For each student retrieved, a record is created and inserted into the SHRIPDS file for later use by the associated reports.

IPEDS rules dictate that a student may only be counted one time in the ethnicity section if the student is a non-resident alien. A check is made to determine if this is the case, and if it is, the ethnicity is set to reflect this condition.

The student's sex indicator is captured. The student's age is calculated using the student's birthday and user-entered date (default today's date), and the appropriate age column is determined.

The process gathers first year, second year, third year, and fourth year statistics based either upon credit ranges or calculated student classification. Parameters allow entry of one or more student classification codes which, when using online job submission, are validated against the Class Code Validation Form (STVCLAS). When class code values are entered in these parameters, the specified class codes determine which row a student will be reported in, in the IPEDS Web upload file. The credit hour parameters which have been used to control the first year, second year, etc., determination are still required. However, if values are entered in any class code parameters for a given year, the class code instead of the credit hour value is used to determine the row in which a student is reported.

A calculation is done to determine whether or not the student is full-time or part-time based on the following criteria:

Valid undergraduate registered hours for the process term are equal to or greater than the credit hours designated as full-time undergraduate (parameter for Full-Time Undergraduate Hours).

Graduate full-time or part-time hours are calculated the same way. Use the Graduate level parameters to count all student levels and categories that were formerly counted in First-Professional. First-Time First-Professionals must now use the student type code for First-Time Graduate.

Additionally, data is gathered and indicators set if the student is enrolled in all remedial courses, all foreign campuses, all off-campus, or all audit courses or all of the three. All of a student's registered courses are examined for remedial attributes (those supplied through a parameter).

Reporting counts are broken down by undergraduate, non-degree/certificate seeking undergraduate, and graduate levels, and are then further subdivided by whether the

students are enrolled exclusively in distance education or only in some courses that are considered to be distance education. They are also separated into groups by location, such as in-state, out-of-state, and outside the United States.

The IPEDS reports work the same as other Banner reports. If run through job submission, editing of data with system table ties is done. If run interactively, no system table editing done.

Campus Codes

Updated: August 27, 2020

The process looks at the student's individual registered courses when considering the parameters for Foreign Campus Code and Off-Campus Code. Schools won't necessarily build courses that are offered at a foreign campus, but the student might be assigned to a foreign campus.

Each user is allowed to decide for themselves which (if any) of their campus(es) meet the criteria, and enter them through this parameter. If all the courses in which a student is registered match the parameter supplied data, then an appropriate switch is set. This works the same way for the off-campus codes.

Student Centric Periods

Updated: December 14, 2023

SHRIPDS processes information based on terms that are part of student-centric periods. SHRIPDS is run by term using the Process Term parameter.

When the Process by Student Period parameter is also used, the process checks the rules on SOASCPT to determine which student centric period includes the value entered in the Process Term parameter as the last term. All term codes that are part of the student centric period are considered, as is the order in which the terms fall within the student centric period.

After the student centric period and the associated terms have been identified, each student record that shows enrollment in any term in the student centric period is read for reporting.

- If the student is registered in all terms of the student centric period, the following

occurs:

- Enrollment hours are summed from all terms in the student centric period in which the student is enrolled, using the existing rules in base SHRIPDS processing.
- Student centric period rules for time status are used and combine the enrollment hours for all the terms in the student centric period.
- The general student record is used for the lowest term in the student centric period in which the student has registration. The process reports the student's class, type, level, and category.
- Registration records for all terms in the student centric period are used to determine remedial courses, foreign campus courses, off-campus courses, audit grade mode courses, and audit registration status courses.
- Academic standing status rules are used. If the student is new, the system assumes a standing of 00. For continuing students, the system pulls the standing from the previous term's academic standing in the **End of Term Academic Standing** field in the Term Header block on SHAINST. (If there is no standing, the system assumes 00.) If an override standing has been entered for the term on SGASTDN, the system will use the override standing.
- If the student is not registered in all terms of the student centric period, the student's registration records are reported for terms included in the student centric period using these rules:
 - The general student record is used for the lowest term in the student centric period in which the student has a registration record. This determines time status, student class, type, level, and category.
 - Student registration records are used for all terms of the student centric period. This determines remedial courses, foreign campus courses, off-campus courses, audit grade mode courses, and audit registration status courses. See the following example.
A student is registered in a term that falls within a student centric period.
 - Student centric period 2009A is composed of terms 200910 and 200920.
 - The student is not included in the student centric period, but is registered in two terms 200910 and 200930), and term 200910 is included in student centric period 2009A.

- Registration is reported for term 200910, because term 200910 is included in student centric period 2009A.
- Registration in term 200930 is not reported, because term 200930 is not included in student centric period 2009A.

Distance Education Codes

Updated: August 27, 2020

When either the Campus Code, Schedule Type, or Instructional Method or all of those parameters are used, distance education is processed for reporting.

SHRIPDS looks at the enrolled students by level for existing courses in the SFRSTCR and SSBSECT tables where the courses contain one of the report parameter values for schedule type, instructional method, or campus. If all the student's courses for the term being processed contain one of those codes (campus, schedule type, instructional method), the student is flagged as being exclusively enrolled in distance education. If some, but not all, of the courses for the student contain the codes selected, the student is flagged as being enrolled in some distance education.

Also, when at least one of the parameters is used (Campus Code, Schedule Type, or Instructional Method, or all of them), the Address Type, State or Province, and Nation Code parameters are required. The process looks for the settings of the Address Type, State or Province, or Nation Code parameters that indicate whether a student is an in-state resident or a United States resident, and then flags the student in the table accordingly to report the residency of students enrolled in distance education.

If the Campus Code, Schedule Type, or Instructional Method or all of those parameters are not used, the Address Type, State or Province, and Nation Code parameters are skipped, and an error is recorded in the log file for the report.

TO PROCESS DISTANCE EDUCATION, ADDRESS TYPE, STATE AND NATION
ARE REQUIRED

lp: Error - no default destination available

Here is a processing example with the following settings:

- Campus Code parameter set to D, Distance

- Schedule Type parameter set to W, Web
- Instructional Method parameter set to ONL, Online

Courses in the SFRSCTR table are used to determine whether they are counted or not counted as distance education by SHRIPDS. These are OR conditions. If more than one parameter is used for defining the distance education courses, there are multiple ways a course can be considered as a distance education course.

Course	Number	Description	Campus	Schedule Type	Instructional Method	Count as Distance Education
ARTH	200	Art History	D	L	Null	Yes
MATH	200	Math I	M	L	ONL	Yes
ECON	200	Micro Economics	M	W	Null	Yes
PSYC	200	Psychology I	D	W	ONL	Yes
HIST	200	History	M	L	Null	No

When enrolled students are found through SHRIPDS, the process then determines if the students are enrolled exclusively in distance education, enrolled in some distance education courses, or not enrolled in any distance education courses. The Web upload file created using SHRIETH displays these conditions as ENROLL_EXCLUSIVE, ENROLL_SOME, or NOTENROLL. The course must have an STVRSTS code that is set to count in enrollment for the PIDM and term. The CRN must have a value from SSBSECT defined in the Campus Code, Schedule Type, or Instructional Method parameters qualifies as a distance education course.

Counts are defined by level for undergraduate degree seeking students, undergraduate non-degree seeking students, and graduate students. Information for enrollment for distance education courses appears in Part G of the Web upload file for SHRIETH.

Student Location

Updated: December 14, 2023

When a student has been defined as having exclusive enrollment in distance education

courses, processing then determines the student's location based on an address hierarchy and address date.

Students can be in-state, out-of-state but within the U.S., have an unknown state within the U.S., or be outside of the U.S. The Web upload file displays these conditions as INUS, INUS_NOTPPS, INUS_UNKNOWN_STATE, or OUTSIDEUS. The Address Selection Date, Address Type, State or Province, and Nation Code parameters are used for this data.

The Address Selection Date parameter allows for reporting for a date within an enrollment period. Therefore the address for the student should be current as of the date specified in the parameter.

The Address Type parameter allows for a hierarchy of address types the process can search for. If a student does not have any of the address types entered, or the student does not have any addresses in the SPRADDR table, the record is populated into the location unknown row on the IPEDS form/Website so the enrollment counts for distance education will still be accurate. When the state for the student is unknown but the nation code is known, the student is reported as state unknown, located in the United States.

When a student has an address type but the nation code is Null, the address is assumed to be in the United States. When the nation for the address type is equal to the value in the Nation Code parameter, the address is considered to be in the United States. When the nation for the address type is not equal to the value in the Nation Code parameter, the address is considered to not be in the United States.

A student can have an address record with a state/province value, and still be in a non-United States location such as Canada. Therefore, when the nation code is populated in student address data, it is best to define the nation code or codes that would be considered to be in the United States, and so avoid errors in processing this information for the report.

Parameter Name	Required?	Description	Values
Purge IPEDS File Option	No	Enter Y to purge an existing IPEDS table. If you enter N, and a table already exists, the process will be terminated.	Y - Purge table N - Do not purge table
Process Term	Yes	Enter the code representing the	Term Code Validation Form

Parameter Name	Required?	Description	Values
		term for which the report is to be run.	(STVTERM)
Full-Time Undergraduate Hours	Yes	Enter the minimum number of credits required to be considered a full-time undergraduate student.	
Full-Time Graduate Hours	Yes	Enter the minimum number of credit hours required to be considered a full-time graduate student.	
No Longer Used (Full-Time Professional Hours)	Inactive, do not use	Values entered in this parameter will not be processed.	
Freshman Credit Hour Limit	Yes	<p>Enter the undergraduate credit hour limit for a student to be considered a freshman. Students must have a number of cumulative credit hours in academic history that is less than the maximum freshman credit hour limit entered in this parameter, to be considered a freshman.</p> <p>If a value is entered in the Freshman</p>	

Parameter Name	Required?	Description	Values
		Class Codes parameter, the calculated class, rather than hours, is used to determine placement in IPEDS reports.	
Second Year Credit Hour Limit	Yes	<p>Enter the undergraduate credit hour limit for a student to be considered a second year student. Students must have a number of cumulative credit hours in academic history that is less than the maximum second year credit hour limit entered in this parameter.</p> <p>They must also have a number of credits that is greater than or equal to the maximum freshman credit hour limit entered in the previous parameter, to be considered a second year student.</p> <p>If a value is entered</p>	

Parameter Name	Required?	Description	Values
		in the Second Year Codes parameter, the calculated class, rather than hours, is used to determine placement in IPEDS reports.	
Third Year Credit Hour Limit	Yes	<p>Enter the undergraduate credit hour limit for a student to be considered a third year student. Students must have a number of cumulative credit hours in academic history that is less than the maximum third year credit hour limit entered in this parameter.</p> <p>They must also have a number of credits that is greater than or equal to the maximum second year credit hour limit entered in the previous parameter, to be considered a third year student. Students with cumulative credit hours greater than</p>	

Parameter Name	Required?	Description	Values
		<p>the maximum third year limit are counted as fourth year students.</p> <p>If a value is entered in the Third or Fourth Year Class Codes parameters, the calculated class, rather than hours, is used to determine placement in IPEDS reports.</p>	
1st Time Freshman Student Type	Yes	Enter the student type codes representing first-time freshman students. Multiple values may be entered.	Student Type Code Validation Form (STVSTYP)
Unclassified Student Type	Yes	Enter the student type codes representing unclassified students. Multiple values may be entered.	Student Type Code Validation Form (STVSTYP)
1st Time Transfer Student Type	Yes	Enter the student type codes representing first-time transfer students. Multiple values may be entered.	Student Type Code Validation Form (STVSTYP)
1st Time Graduate	Yes	Enter the student	Student Type Code

Parameter Name	Required?	Description	Values
Student Type		type codes representing first-time graduate students. Multiple values may be entered.	Validation Form (STVSTYP)
No Longer Used (1st Time Professional Student Type)	Inactive, do not use	Values entered in this parameter will not be processed.	
Undergraduate Level Code	Yes	Enter the level code representing undergraduate students. Multiple values may be entered.	Level Code Validation Form (STVLEVL)
Graduate Level Code	Yes	Enter the level code representing graduate level students. Multiple values may be entered.	Level Code Validation Form (STVLEVL)
No Longer Used (Professional Level Code)	Inactive, do not use	Values entered in this parameter will not be processed.	
Undergraduate Category	Yes	Enter the degree award category code representing undergraduate degrees. Multiple values may be entered.	Degree Award Category Code Validation Form (STVACAT)
Graduate Category	Yes	Enter the degree award category code representing graduate level degrees. Multiple values may be	Degree Award Category Code Validation Form (STVACAT)

Parameter Name	Required?	Description	Values
		entered.	
No Longer Used (1st Professional Category)	Inactive, do not use	Values entered in this parameter will not be processed.	
Birth Date	No	Enter a date which will be used to determine the age of a person relative to the date the report is being processed. The system date is the default.	
Remedial Course Attributes	No	Enter the valid course attribute code that indicate which course sections are remedial. Multiple values may be entered.	Attribute Validation Form (STVATTR)
Foreign Campus Code	No	Enter a valid campus code to select students who are taking courses on foreign campuses. Multiple values may be entered. Students taking all of their courses at a foreign campus are excluded.	Campus Code Validation Form (STVCAMP)
Off Campus Code	No	Enter a campus code to select students who are enrolled exclusively in off-campus or extension	Campus Code Validation Form (STVCAMP)

Parameter Name	Required?	Description	Values
		centers. Multiple values may be entered.	
Audit Grade Mode	No	Enter the grading mode which identifies an audit-only registration. Multiple values may be entered.	Grading Mode Code Validation Form (STVGMOD)
Audit Registration Status	No	Enter the course registration status code which applies to the course being taken. Multiple values may be entered. Students taking all audit courses are excluded from the four reports.	Course Registration Status Code Validation Form (STVRSTS)
Freshman Class Code	No	Enter a class code which represents first year class standing. Multiple values may be entered. If entered, class standing, rather than the freshman year credit hour limit, will be used to determine first year students.	Class Code Validation Form (STVCLAS)
Second Year Class Code	No	Enter a class code which represents second year class	Class Code Validation Form (STVCLAS)

Parameter Name	Required?	Description	Values
		standing. Multiple values may be entered. If entered, class standing, rather than the second year credit hour limit, will be used to determine second year students.	
Third Year Class Code	No	Enter a class code which represents third year class standing. Multiple values may be entered. If entered, class standing, rather than the third year credit hour limit, will be used to determine third year students.	Class Code Validation Form (STVCLAS)
Fourth Year Class Code	No	Enter a class code which represents fourth year class standing. Multiple values may be entered. If entered, class standing, rather than the fourth year credit hour limit, will be used to determine fourth year students.	Class Code Validation Form (STVCLAS)
Process by Student Period	No	Enter Y to process by a student centric period or N to not	Y - Use student centric period

Parameter Name	Required?	Description	Values
		process by a student centric period. The default is N.	N - Do not use student centric period
Campus Code	No	Enter the campus code for distance education reporting.	Campus Code Validation Form (STVCAMP)
Schedule Type	No	Enter the schedule type code for distance education reporting.	Schedule Type Code Validation Form (STVSCHD)
Instructional Method	No	Enter the instructional method code for distance education reporting.	Instructional Method Validation Form (GTVINSM)
Address Selection Date	No	Enter the address selection date for reporting. This date should be for the enrollment term being reported.	
Address Type	No	<p>Enter the address priority and address type, such as 1MA to establish an address hierarchy for reporting.</p> <p>When the Campus Code, Schedule Type, or Instructional Method parameters are used, this parameter is required.</p>	Address Type Code Validation Form (STVATYP)

Parameter Name	Required?	Description	Values
State or Province	No	Enter the state or province code for an in-state student. When the Campus Code, Schedule Type, or Instructional Method parameters are used, this parameter is required.	State/Province Code Validation Form (STVSTAT)
Nation Code	No	Enter the nation code for the United States. When the Campus Code, Schedule Type, or Instructional Method parameters are used, this parameter is required.	Nation Code Validation Form (STVNATN)
Student Attributes to Exclude	No	Enter student attribute(s) to exclude from reporting	Student attribute validation page (STVATTS)

IPEDS Summary by Age Report (SHRIAGE)

Updated: August 27, 2020

This report generates student counts by age, gender, and full-time/part-time status according to CIP Code. It also creates Part B of the EF Survey Section.

The output provides a breakdown of registered students by CIP Code within the Department of Education age categories. The CIP Code associated with the student is derived from the student's major code (STVMAJR) from SORLCUR and SORLFOS. The

information on this report coincides with the data on the Enrollment Summary by Racial/Ethnic Status (SHRIETH). The information is broken down as follows:

Undergraduate Degree Seeking	Rows	01-06	of SHRIETH for full-time students
All Other Credit Undergraduates	Row	07	of SHRIETH for full-time students
Graduate Students	Rows	11-13	of SHRIETH for full-time students

Note: The IPEDS File Generation Process Report (SHRIPDS) must be run before this report, as it produces the IPEDS Extract File used in this report.

Web upload for SHRIAGE

Updated: September 28, 2023

Use the Report Format parameter to create hardcopy output only, a comma-delimited file only, or both formats during the same run. This comma-delimited file format conforms to the NCES requirements for the creation of the Key Pair Value file. The Report Format parameter is required.

- Enter 1 to produce hardcopy output.
- Enter 2 to produce output in a Web upload file format.
- Enter 3 to produce both formats.

3 is the default.

Note: When running this report from job submission, the Web upload file name will be in the format `shriage_#####.txt`, where ##### is the run sequence number.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the code representing the term for which the report is to be run.	Term Code Validation Form (STVTERM)
CIP Codes	Yes	Enter the CIP codes	CIPC Code Validation

Parameter Name	Required?	Description	Values
		for which you want to run the report; enter % for all CIP codes. Multiple values may be entered.	Form (STVCIPC)
Grand Total Only	No	Enter Y to print just the grand total pages. Enter N to print all the detail pages.	Y - Print total pages N - Print detail pages
Report Format	Yes	Enter 1 to produce hardcopy output. Enter 2 to produce output in a Web upload file format. Enter 3 to produce both formats. 3 is the default.	1 - Hardcopy output 2 - Web upload file 3 - Both

IPEDS Race/Ethnic Status Report (SHRIETH)

Updated: August 27, 2020

This report generates the racial/ethnic breakdown of the selected students and may be used to complete Part A of the Enrollment Summary Report.

Statistical information is generated on the race/ethnic background of students by CIP code. The text file reports statistics only on the CIP codes specified and provides data for Part A of the EF Survey Section and Part D, for the total number of students enrolled.

Undergraduate students are classified by student type, degree category, and level. For example, if a first time undergraduate freshman has a degree category of Masters of Business, then that freshman will be counted in the Undergraduates Enrolled for Credit, because the freshman's degree category does not meet the parameter specified undergraduate degree categories.

For the Ethnic Status Report, students must be registered in the requested term. Subject areas for the students are determined by the CIPC code on the CIPC Code Validation Form (STVCIPC) for each student's major, which is in the student's learner curriculum record. These major codes are defined on the Major, Minor, Concentration Code Validation Form (STVMAJR).

The ethnic category for a student is determined by the **New Ethnicity Code** value maintained on the General Person Form (SPAPERS). The `SPBPERS_ETHN_CDE` value is used to track ethnicity for hispanic, non-hispanic, or non-resident alien ethnicities. Race categories are defined on the Race Rules Form (GORRACE) using the **Regulatory Race (Code)** value that is associated with the **Institution Race (Code)** value. The `GORRACE_RRAC_CODE` value is used to report race categories.

If a student is a non-resident alien, then only the alien status is counted, and race is disregarded. The non-resident alien status is determined by the current visa type established on the International Information Form (GOAINTL), where the current visa type code on the Visa Type Code Validation Form (STVVTYP) has the **Non-Resident (Indicator)** checked (set to Y), and where the visa **Start Date** and **End Date** values from GOAINTL are current as of the creation of the IPEDS data.

The Degree Award Category Code Validation Table (STVACAT) is used to classify degree codes (i.e., B.A. = Bachelor of Arts) into award categories. Required codes for the STVACAT Table are included in the table definitions and should be used.

Students are categorized by the user-specified parameter selections.

For example:

- Full-time versus part-time hours for undergraduates and graduates is a parameter selection.
- Undergraduate and graduate degree categories are user selected. Unlimited categories are available. Graduate categories should include those categories formerly used for First-Professional, in addition to all Doctoral categories.

- First-Time students are determined by user-selected student types for undergraduates and graduates. Unlimited student types are available.
- Level codes for undergraduates and graduates are user specific. Unlimited level codes are available.
- The credit hour range for a first year student is user-defined.
- You may specify the student types used for unclassified students.

The Degree Code Validation Form (STVDEGC) uses the Degree Award Category Code Validation Form (STVACAT) to identify the category that the degree code belongs to, such as Bachelor's, Master's, Doctoral.

Student Type Classification

Updated: September 28, 2023

Students are classified by type as follows by the Student Type Validation Form (STVSTYP).

- First-Time Freshmen are students classified as freshman when their category matches the user-entered category, and their level matches a freshman, user-entered, undergraduate level.
- Other First Year students are classified as transfer-in, degree or certificate-seeking undergraduates.
- Sophomores are classified as students who have more than the maximum number of freshman hours and less than the maximum number of hours designated for a sophomore through the parameter selection of second year credit hours.
- Students whose earned credit hours are greater than or equal to the user-specified freshman credit hours and less than the user-specified sophomore credit hours are counted as sophomores.
- Juniors are classified as students who have more than the maximum number of sophomore hours and less than the maximum number of hours designated for a junior through the parameter selection of third year credit hours.
- Seniors are classified as students who have more than the maximum number of hours designated for a third year student.

- Unclassified students are students that have a student type equal to the parameter selected as unclassified student type.

Transfer hours are used in the calculation of student classification. For example, if a student has 60 transfer credits and 20 institutional credits, then 80 credits will be used to determine their class standing.

Those students who have dropped or withdrawn from all of their classes will not be included in the file. The process examines the **Count in Enrollment** box on the Course Registration Status Code Validation Form (STVRSTS). If all of the course statuses are flagged as `Do not count in enrollment` (**Count in Enrollment** is not selected), then the student is not included in the file.

The totals for full-time degree/certificate-seeking undergraduate students and part-time degree/certificate-seeking undergraduates are reflected in the counts.

Part D is used to generate a new record for the number of students enrolled. Only one record is required.

Part G is used to report the number of students enrolled in distance education courses.

Part H is used to report counts by unknown gender or another gender other than men/women.

Note: The IPEDS File Generation Process (SHRIPDS) must be run before this report, as it produces the IPEDS Extract File used in this report.

Web upload for SHRIETH

Updated: September 28, 2023

The report produces a control page with the parameter values and the number of records processed, and a comma-delimited file for the Web upload. This comma-delimited file format conforms to the NCES requirements for the creation of the Key Pair Value file.

Note: When running this report from job submission, the Web upload file name will be in the format `shrieth_#####.txt`, where ##### is the run sequence number.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the code	Term Code

Parameter Name	Required?	Description	Values
		representing the term for which the report is to be run.	Validation Form (STVTERM)
CIP Codes	Yes	Enter the CIP codes for which you want to run the report; enter % for all CIP codes. Multiple values may be entered.	CIPC Code Validation Form (STVCIPC)
No Longer Used (Grand Total Only)	Inactive, do not use	Values entered in this parameter will not be processed.	
No Longer Used (Report Format)	Inactive, do not use	Values entered in this parameter will not be processed.	
Another gender for undergrad?	Yes	Identifies if your institution able to report another gender for undergraduate.	<ul style="list-style-type: none"> • Y - Yes (able to report another gender) • N - No (not able to report another gender)
Report another gender grad?	Yes	Identifies if your institution able to report another gender for graduate.	<ul style="list-style-type: none"> • Y - Yes (able to report another gender) • N - No (not able to report another gender)

Graduation Rate Survey Report (SHRIGRS)

Updated: August 27, 2020

This IPEDS report collects data on the numbers of undergraduate students entering an institution as full-time, first-time, degree/certificate seeking students.

The GRS requires institutions to collect and generate data on a particular cohort code. The GRS applies only to those institutions that are eligible for Federal student financial assistance and enroll full-time, first-time, degree/certificate seeking undergraduate students. Reporting is by race/ethnicity and gender, length of time to completion, number still persisting, and number transferred to other institutions. The report requires an institution to take a snapshot of these students for a particular year (cohort) and then again after 150% of normal time has elapsed.

Beginning with the Spring 2008 submissions, the NCES has eliminated Sections V and VI that collected data on students who received athletically related student aid. (The related parameters are no longer used and should not be populated.) Institutions are no longer required to report this data to IPEDS, but are still required to disclose this data, as specified in the Student Assistance General Provision Regulations (34 CFR 668) which implemented the Student Right-to-Know Act. An item has been added for the URL which can be used to report this disclosure.

The GRS is published in four versions:

Version	Institution
GRS1	4-year institutions
GRS2	2-year public institutions
GRS2A	2-year private institutions
GRS3	less than 2-year institutions

Refer to the *IPEDS Report Procedures* section of the *Academic History* in the *Banner Student Use* content for detailed setup instructions for this report. You need to set up cohort codes, cohort reason codes, and withdrawal reason codes and associate students with a cohort code for an effective term. You also need to track students who have withdrawn from the institution due to transfer or study-related job and students who are in good academic standing.

Note: This IPEDS report is standalone. You do not need to run the IPEDS File Generation

Process (SHRIPDS) before running SHRIGRS.

Student Centric Periods

Updated: December 14, 2023

The following parameters can be used with student-centric periods.

- Start Term parameter - Enter the minimum start term of the student centric period to be processed.
- End Term parameter - Enter the maximum end term of the student centric period to be processed.
- Enrollment Terms parameter - The maximum enrollment term is used to select students to be reported for the student-centric period. Students enrolled in any terms up to the maximum enrollment term will be reported.

Web upload for SHRIGRS

Updated: December 14, 2023

The report produces a control page with the parameter values and the number of records processed, and a comma-delimited file for the Web upload. This comma-delimited file format conforms to the NCES requirements for the creation of the Key Pair Value file.

Note: When running this report from job submission, the Web upload file name will be in the format `shrigrs_#####.txt`, where ##### is the run sequence number.

Parameter Name	Required?	Description	Values
GRS Version Number - 1, 2, 2A, or 3	Yes	Enter the version number representing the type of institution for which the graduation rate survey is to be run. Enter 1 for four year, 2 for two year public, 2A for two year private, or 3 for less	1 - 4 year 2 - 2 year public 2A - 2 year private 3 - less than 2 years

Parameter Name	Required?	Description	Values
		than two years.	
Cohort Type - F or Y	Yes	<p>Enter the cohort type for the cohort you want to include in the report. Enter F for a Fall Cohort or Y for a Full Year Cohort.</p> <ul style="list-style-type: none"> • Use the Fall Cohort if your institution is standard term-based. • Use the Full Year Cohort if your institution is not predominantly term-based. 	<p>F - Fall Cohort</p> <p>Y - Full Year Cohort</p>
Start Term	Yes	<p>Enter the starting term for the cohort you want to include in the report.</p> <p>For student centric periods, enter the minimum start term of the student centric period to be processed.</p>	Term Code Validation (STVTERM) page
End Term	Yes	Enter the ending term to be used for the Cohort Type chosen in the Cohort Type parameter.	Term Code Validation (STVTERM) page

Parameter Name	Required?	Description	Values
		<ul style="list-style-type: none"> • For the Full Year Cohort, use the end term for the first full year of the Full Year Cohort. • For the Fall Cohort, use the term that is the same as the Start Term. • For student centric periods, enter the maximum end term of the student centric period to be processed. 	
Enrollment Term	Yes	<p>Enter the term in which the student must be enrolled to be counted as a persister. Multiple terms can be entered.</p> <p>The maximum enrollment term is used to select students to be reported for the student centric period. Students</p>	Term Code Validation (STVTERM) page

Parameter Name	Required?	Description	Values
		enrolled in any terms up to the maximum enrollment term will be reported.	
Full-time Cohort Code	Yes	<p>Enter the cohort code for full-time students that will be processed for those specified with a matching start term for Fall cohorts. Multiple codes can be entered.</p> <p>For the Full Year cohort, cohorts with a start term that is between the Start and End terms for the first full year will be processed.</p> <p>A wildcard (%) will process all cohort codes with a matching start term for the Fall cohort and a start term that is between the Start and End terms for the first full year, and includes cohorts with a Print Indicator which is checked (set to Y) on STVCHRT.</p>	Cohort Code Validation (STVCHRT) page

Parameter Name	Required?	Description	Values
Excl Code – Disabled/Deceased	Yes	Enter the code used to indicate cohort exclusion for death or disability in IPEDS reporting. Multiple codes may be entered.	Cohort Reason Code Validation (STVCREA) page
Excl Code – Armed Forces	Yes	Enter the code used to indicate cohort exclusion for armed forces service in IPEDS reporting. Multiple codes may be entered.	Cohort Reason Code Validation (STVCREA) page
Excl Code – Foreign Service	Yes	Enter the code used to indicate cohort exclusion for foreign aid services in IPEDS reporting. Multiple codes may be entered.	Cohort Reason Code Validation (STVCREA) page
Excl Code – Church Mission	Yes	Enter the code used to indicate cohort exclusion for church missions service in IPEDS reporting. Multiple codes may be entered.	Cohort Reason Code Validation (STVCREA) page
Part-time Cohort Code	No	Enter the cohort codes for part-time students for Section IV. Multiple codes may be entered. This parameter is only used to GRS2 schools.	Cohort Code Validation (STVCHRT) page
Offer Athletic Aid? (Y		Inactive, do not use	Values entered in

Parameter Name	Required?	Description	Values
or N)			this parameter will not be processed.
Sport Code – FOOTBALL		Inactive, do not use	Values entered in this parameter will not be processed.
Sport Code – BASKETBALL		Inactive, do not use	Values entered in this parameter will not be processed.
Sport Code – BASEBALL		Inactive, do not use	Values entered in this parameter will not be processed.
Sport Code – XCOUNTRY/TRACK		Inactive, do not use	Values entered in this parameter will not be processed.
Fall Term for Sport Sec. V		Inactive, do not use	Values entered in this parameter will not be processed.
End Term for Sport Sec. V		Inactive, do not use	Values entered in this parameter will not be processed.
Undergraduate Level for Sec. V		Inactive, do not use	Values entered in this parameter will not be processed.
Full-time Hours for Sports		Inactive, do not use	Values entered in this parameter will not be processed.
Transfer Out Code - <2 yr Inst	No	Enter the reason code the student is transferring out to a school of less than two years. Multiple codes may be entered.	Withdrawal Reason Code Validation (STVWRSN) page
Transfer Out Code - 2 yr Inst	No	Enter the reason code the student is	Withdrawal Reason Code Validation

Parameter Name	Required?	Description	Values
		transferring out to a two year school. Multiple codes may be entered.	(STVWRSN) page
Transfer Out Code - 4 yr Inst	No	Enter the reason code the student is transferring out to a four year school. Multiple codes may be entered.	Withdrawal Reason Code Validation (STVWRSN) page
Left for job in their field	No	Enter the reason code the student is transferring out to a job in their field. Multiple codes may be entered.	Withdrawal Reason Code Validation (STVWRSN) page
Code - Good Academic Standing	No	Enter the code used to indicate a good academic standing. Multiple codes may be entered. This parameter is only used for GRS2 and GRS2A schools.	Academic Standing Code Validation (STVASTD) page
No Longer Used (Print Details?)		Inactive, do not use	Values entered in this parameter will not be processed.
No Longer Used (Report Format)		Inactive, do not use	Values entered in this parameter will not be processed.
Pell Grant Code	No	Enter detail code for Pell Grant	Detail Code Control (TSADETC) page
Subsidized Loan Code	No	Enter detail code for subsidized Stafford loan	Detail Code Control (TSADETC) page
Summer Term	No	Summer term	Term Code

Parameter Name	Required?	Description	Values
			Validation (STVTERM) page
Create Detail File	Yes	Enter 'Y' to create student detail file.	
Able to report another gender?	Yes	Identifies if your institution able to report another gender for your students.	<ul style="list-style-type: none"> • Y - Yes (able to report another gender) • N - No (not able to report another gender)
Student Attributes to Exclude	No	Enter student attribute(s) to exclude from reporting	Student attribute validation page (STVATTS)

Note: For the Graduation Rate Survey Report (SHRIGRS), we use the enrollment term to determine the term range of the attributes by:

- picking the maximum term entered in the enrollment term parameter
- using that term to determine the registration term, for example, SFBETRM)
- using the registration term to find the active attributes

Outcome Measures Report (SHRIOMS)

Updated: August 27, 2020

This IPEDS report collects data for award completion and enrollment status from degree granting institutions.

Data is required for four undergraduate cohorts and eight undergraduate sub-cohorts at three points in time: four years, six years, and eight years after the students entered the reporting institution.

The first submission of this report will be for the entering cohort year of 2009-2010. The four year status date for the 2009-2010 cohort year is August 31, 2013. The six year status date for the 2009- 2010 cohort year is August 31, 2015. The eight year status date for the 2009-2010 cohort year is August 31, 2017. Beginning with the 2017-2018 reporting year, the NCES requires all institutions to report on a full year cohort only. Additionally, institutions must report the number of students who received a Pell Grant award during the covered period of July 1, 2009 through June 30, 2010. Students who receive a Pell Grant during the covered period will be included in the Pell Grant Recipients sub-cohort within their respective Cohort. Students who do not receive a Pell Grant during the covered period will be included in the Non-Pell Grant Recipients sub-cohort within their respective Cohort. Each student will be counted only once.

The four cohorts and their respective sub-cohorts of degree/certificate seeking undergraduates are:

- First-Time, full-time entering (FTFT)
 - Pell Grant Recipients
 - Non-Pell Grant Recipients
- First-time, part-time entering (FTPT)
 - Pell Grant Recipients
 - Non-Pell Grant Recipients
- Non-first-time, full-time entering (NFTFT)
 - Pell Grant Recipients
 - Non-Pell Grant Recipients
- Non-first-time, part-time entering (NFTPT)
 - Pell Grant Recipients
 - Non-Pell Grant Recipients

You can enter multiple cohorts. SHRIOMS will use the start date for the cohort, as listed on STVCHRT, for the Start Term, unless you have entered a term in the Summer Term parameter. If you have entered a Summer Term, SHRIOMS will use the start date of the Summer Term as the starting point to collect the pell/cohort information. It will use the last day of the End Term entered in the End Term parameter as the end point for collecting the pell/cohort data.

The summer term parameter is available for reporting schools where summer begins an academic year. Students who begin in the summer, and are assigned a cohort code will be included in respective cohort and sub-cohort counts when this parameter is populated.

You can also create a detail output file that contains the Banner ID, Student Name, Cohort Code, Pell Recipient (Y/N), Exclusion Code, Transfer Out Code, Student Status, Highest Degree Earned at 4 Years, Award Date at 4 Years, Highest Degree Earned at 6 Years, Award Date at 6 years, Highest Degree Earned at 8 Years, and the Award Date at 8 Years.

Refer to the *IPEDS Report Procedures* section of the *Academic History* in the *Banner Student Use* content for the detailed setup instructions for this report. You must set up cohort codes, cohort reason codes, and withdrawal reason codes, and associate students with a cohort code for an effective term. The cohort codes determine which students are included for reporting.

Note: This IPEDS report is standalone. You do NOT need to run the IPEDS File Generation Process (SHRIPDS) before running SHRIOMS.

Student Centric Periods

Updated: December 14, 2023

The following parameters can be used with student centric-periods.

- Start Term parameter - Enter the minimum start term of the student centric period to be processed.
- End Term parameter - Enter the maximum end term of the student centric period to be processed.
- Enrollment Terms parameter - The maximum enrollment term is used to select students to be reported for the student centric period. Students enrolled in any terms up to the maximum enrollment term will be reported.

Note: A student will be reported when that student has a cohort code that matches the parameter values entered, and an SFBETRM enrollment record or SHRTGPA institutional academic history record for terms between the term entered in the Start Term parameter and the term entered in the End Term parameter.

Web upload for SHRIOMS

Updated: December 14, 2023

The report produces a control page with the parameter values, and a comma-delimited file for the Web upload. This comma-delimited file format conforms to the NCES requirements for the creation of the Key Pair Value file.

You have the option to produce a file of detailed records for the students contained in the web upload file. This can be used to review the data before uploading the file.

Note: When running this report from job submission, the Web upload file name will be in the format `shrioms_#####.txt`, where ##### is the run sequence number. The detail file name will be in the format `shrioms_#####.csv`, where ##### is the run sequence number.

Parameter Name	Required?	Description	Values
Cohort Type - F or Y	Yes	Enter the cohort type for the cohort you want to include in the report. Enter <code>F</code> for a Fall Cohort or <code>Y</code> for a Full Year Cohort. The default is <code>F</code> . Use the Fall Cohort if your institution is standard term-based. Use the Full Year Cohort if your institution is not predominantly term-based.	F - Fall Cohort Y - Full Year Cohort
Start Term	Yes	Enter the starting term for the cohort you want to include in the report.	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		For student centric periods, enter the minimum start term of the student centric period to be processed.	
End Term	Yes	<p>Enter the ending term to be used for the cohort type chosen in the Cohort Type parameter.</p> <ul style="list-style-type: none"> • For the Full Year Cohort, use the end term for the first full year of the Full Year Cohort. • For the Fall Cohort, use the term that is the same as the Start Term. • For student centric periods, enter the maximum end term of the student centric period to be processed. 	Term Code Validation Form (STVTERM)
Enrollment Term	Yes	Enter the term in which the student must be enrolled to	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		<p>be counted as still enrolled. Multiple terms can be entered.</p> <p>The maximum enrollment term is used to select students to be reported for the student centric period. Students enrolled in any terms up to the maximum enrollment term will be reported.</p>	
Full-Time First-Time Cohort	No	<p>Enter the cohort code for full-time, first-time students that will be processed for those specified with a matching start term for Fall cohorts. Multiple codes can be entered.</p> <p>For the Full Year cohort, cohorts with a start term that is between the Start and End terms for the first full year will be processed.</p>	Cohort Code Validation Form (STVCHRT)
Part-Time First-Time Cohort	No	Enter the cohort code for part-time,	Cohort Code Validation Form

Parameter Name	Required?	Description	Values
		<p>first-time students that will be processed for those specified with a matching start term for Fall cohorts. Multiple codes can be entered.</p> <p>For the Full Year cohort, cohorts with a start term that is between the Start and End terms for the first full year will be processed.</p>	(STVCHRT)
Full-Time Non-First-Time Cohort	No	<p>Enter the cohort code for full-time, non-first-time students that will be processed for those specified with a matching start term for Fall cohorts. Multiple codes can be entered.</p> <p>For the Full Year cohort, cohorts with a start term that is between the Start and End terms for the first full year will be processed.</p>	Cohort Code Validation Form (STVCHRT)
Part-Time Non-First-Time Cohort	No	Enter the cohort code for part-time,	Cohort Code Validation Form

Parameter Name	Required?	Description	Values
		<p>non-first-time students that will be processed for those specified with a matching start term for Fall cohorts. Multiple codes can be entered.</p> <p>For the Full Year cohort, cohorts with a start term that is between the Start and End terms for the first full year will be processed.</p>	(STVCHRT)
Excl Code – Disabled/Deceased	Yes	Enter the code used to indicate cohort exclusion for death or disability. Multiple codes may be entered.	Cohort Reason Code Validation Form (STVCREA)
Excl Code – Armed Forces	Yes	Enter the code used to indicate cohort exclusion for armed forces service. Multiple codes may be entered.	Cohort Reason Code Validation Form (STVCREA)
Excl Code – Foreign Service	Yes	Enter the code used to indicate cohort exclusion for foreign aid services. Multiple codes may be entered.	Cohort Reason Code Validation Form (STVCREA)
Excl Code – Church Mission	Yes	Enter the code used to indicate cohort	Cohort Reason Code Validation Form

Parameter Name	Required?	Description	Values
		exclusion for church missions service. Multiple codes may be entered.	(STVCREA)
Transfer Out Reason Code	No	Enter the reason code for which the student is transferring out of the school. Multiple codes may be entered. Per NCES IPEDS requirements for outcome measures, institutions should only use reason codes which indicate that a student has transferred to a separate institution, and that institution has confirmed the student's subsequent enrollment.	Withdrawal Reason Code Validation Form (STVWRSN)
Four Year Status Date	Yes	Enter the four year status date for reporting.	
Six Year Status Date	Yes	Enter the six year status date for reporting.	
Eight Year Status Date	Yes	Enter the eight year status date for reporting.	
Pell Grant Code	Yes	The Pell Grant detail code(s) used to	Detail Code Control Form (TSADETC)

Parameter Name	Required?	Description	Values
		award students a Pell Grant. Multiple codes can be entered.	
Summer Term	No	Input the summer term(s) IF your school treats summer term(s) as the beginning of an academic year. Students with a cohort code that meets the Cohort Code parameter and start in a summer term provided will be included in the report output.	Term Code Validation Form (STVTERM)
Create Detail File	Yes	Enter Y to create a detail file or N to suppress the detail file. The default is N. The detail file includes the ID, Student Name, Cohort code, Pell Recipient (Y/N), Exclusion code, Transfer Out code, Student Status, Highest Degree Earned at 4 Years, Award Date at 4 years, Highest Degree Earned at 6 years, Award Date at	Y - Detail file N - No detail file

Parameter Name	Required?	Description	Values
		6 years, Highest Degree Earned at 8 Years, and the Award Date at 8 Years.	
Student Attributes to Exclude	No	Enter student attribute(s) to exclude from reporting	Student attribute validation page (STVATTS)

Electronic Data Interchange Reconciliation (SHREDIR)

Updated: August 27, 2020

The Electronic Data Interchange Reconciliation (SHREDIR) reconciles the disposition file returned from EDI.Smart with the transcript requests in the Transcript Request Collector Table (SHTTRAN).

The disposition file will contain a record for each transcript generated by the Electronic Data Interchange Extract (SHREDIY), from the Transcript Request Form (SHARQTC), and sent to EDI.Smart.

Each record contains the request number, status of the transcript request in the EDI.Smart process, and the date the status was applied. The Electronic Data Interchange Reconciliation (SHREDIR) reads the disposition records and attempts to match each one to a request in the Transcript Request Collector Table (SHTTRAN).

To accomplish this matching, SHREDIR will use the request number assigned and stored by SHREDIY, on SHTTRAN and passed to EDI.Smart through the control file, when the transcript was generated. If a match is found, SHREDIR will update the SHTTRAN record with the status and status date. The user can then view the status, status date, and status description on the Transcript Request Form (SHARQTC), for the student. If no match is found, an error will be printed on the report showing the student ID, sequence number, recipient/SBGI ID, request number, status, and status description, along with the error message.

Parameter Name	Required?	Description	Values
Mode	Yes	Enter A for Audit mode, to create a report of reconciliation records or errors or both with no database changes. Enter U for Update mode, to create a report of reconciliation records or errors or both with status code and status date updated to the database.	A - Audit mode U - Update mode
Print Errors Only	No	Enter Y to create a report of only those records that cannot be reconciled. Enter N to create a report of all records in the Disposition file and their status. The default value is N .	Y - Report unreconciled records N - Report all records
Reconciliation File	Yes	Enter the path and file name for the disposition file. For example, /u02/s7s80/jobsub/d.txt.	
Signal File	Yes	Enter the path and file name for the signal file. For example, /u02/s7s80/jobsub/l.txt.	

Electronic Data Interchange Institutions (SHREDII)

Updated: August 27, 2020

The Electronic Data Interchange Institutions (SHREDII) updates the Source/Background Institution Code Validation Form (STVSBGI) with institution information.

Obtain a file from the host containing the FICE code, institution name, and EDI capable flag. SHREDII will read this file and attempt to match the FICE code to the source/background institution code if the institution FICE code is `Null`. If a match is found, SHREDII will update the EDI capable flag and activity date. If no match is found, and the user requested `y` for input parameter Add New Institutions, SHREDII will add the institution using the FICE code as the source/background institution code, institution name, EDI capable flag, activity date, and `c` (College) as the source/background institution type. If no match is found and the user requested `N` for input parameter Add New Institutions, SHREDII will print the institution information and a `Not Found` message on the report.

Parameter Name	Required?	Description	Values
Mode	Yes	Enter <code>A</code> for Audit mode to create a report of EDI capable institution records and errors with no database changes. Enter <code>U</code> for Update mode to create a report of EDI capable institution records and errors and update information to the database.	A - Audit mode U - Update mode
Add New Institutions	No	Enter <code>y</code> to add institutions that do not currently exist in Source/Background Institution Code Validation Form (STVSBGI) using the	Y - Add institutions not on STVSBGI N - Ignore institutions not on STVSBGI

Parameter Name	Required?	Description	Values
		FICE code as the Source/Background Institution Code. Enter N to ignore institutions that do not exist in STVSBGI and print a message. The default value is N.	
Print Only Not Found	No	Enter Y to create a report of only those institutions that were not found in Source/Background Institution Code Validation Form (STVSBGI). Enter N to create a report of all institutions found in the EDI Capable Institution file. The default value is N.	Y - Report institutions not on STVSBGI N - Report institutions in EDI file

Electronic Transcript Upload Purge Process (SHRETRP)

Updated: August 27, 2020

This process is used to purge electronic transcript data in EDI or PESC/XML format. This would be done after electronic transcripts have been processed to their final step (usually transfer articulation) in the Banner Student System. Also, storage of a large number of records may negatively impact online processing.

EDI.Smart users should keep in mind that EDI.Smart includes archiving capability, so that if any future questions might arise about a previously received, articulated, and purged transcript, the original data would still be available through EDI.Smart. XML transcript data is purged from the appropriate tables (SHREPTD/SHRIPTD) based on the SHBHEAD_DCMT_SEQNO value for the XML import and export log tables.

Note: An electronic transcript will not be for purged unless a routing status code exists for the transcript that has the **Archive Status Indicator** set to Y on the Electronic Document Status Code Validation Form (STVDSTS).

The report control information will optionally include two sections as follows	
Section One	Transcripts to be purged, or actually purged, depending on Run Mode, and if Suppress Report Detail is N.
Section Two	Transcripts with no Archive status, but are older than or equal to the Transcript Received Purge Date, if Print Transcripts Not Eligible for Purge is Y.

Note: If the transcript record has been matched to an existing person in Banner, the ID and name information will be printed as they exist in Banner (information from the SPRIDEN record). It is possible that a transcript that has not been matched to a existing person in Banner may be updated with an archive routing status. In this case, the ID and name information will be printed as they were received in the electronic transcript (SHBHEAD and SHRIDEN).

In addition, the report control information will provide summary totals of the number of transcripts by sending institution code, and an overall total for both transcripts to be purged or actually purged, and transcripts not eligible to be purged. Totals will be printed even if report detail printing is not selected.

Parameter Name	Required?	Description	Values
Sending Inst Code to Purge	Yes	Enter the code for the sending institution to be purged, or enter % for all. Multiple codes may be entered to purge groups of institutions.	Source/Background Institution Code Validation Form (STVSBGI)
Transcript Recd Purge Date	Yes	Enter the received date for the transcript to be purged. Transcripts marked with a received date on	

Parameter Name	Required?	Description	Values
		SHAEDIS that is less than or equal to the date entered for the parameter will be purged.	
Report Sorting Order	Yes	<p>Enter \mathfrak{N} for Name order, to list output alphabetically by last, first, middle initial of student name. This is the default order.</p> <p>Enter \mathfrak{s} for Sending institution order to list output alphabetically by sending institution code, and student name within each sending institution.</p> <p>Enter \mathfrak{I} for ID order, to list output in ID order. A page break will occur for each new sending institution when ID order is selected.</p> <p>Output for Name or ID order will be continuous; page breaks occur with line limit feed to the next page of output.</p>	<p>N - Name order</p> <p>S - Sending institution order</p> <p>I - ID order</p>
Suppress Report Detail	Yes	Enter \mathfrak{Y} to have summary statistics	Y - Print summary

Parameter Name	Required?	Description	Values
		only included in the report control output. Enter N to print report detail. N is the default.	N - Print detail
Print (Transcripts) Not Eligible for Purge	Yes	<p>This controls optional printing of the Transcripts Without Archive Status For Purge Date section of the report output.</p> <p>Enter N to suppress the printing of this section. This is the default for this parameter.</p> <p>Enter Y to list transcripts that exist with a Received Date less than or equal to the Transcript Received Purge Date specified, but do not have an Archive routing status.</p>	<p>Y - Print transcripts not eligible for purge</p> <p>N - Don't print transcripts not eligible for purge</p>
Run Mode - Audit or Update	Yes	<p>Enter A to audit or list the transcripts to be purged. This is the default value for this parameter,</p> <p>Enter U to update the database by</p>	<p>A - Audit mode</p> <p>U - Update mode</p>

Parameter Name	Required?	Description	Values
		performing the purge and listing the transcripts that were purged, depending on the options selected for the two preceding parameters.	

Upload of EDI Transcript Process (SHREDIP)

Updated: August 27, 2020

This process is used to load transcript data into interim database tables in Banner, after the FLAT130 file produced by EDI.Smart has been uploaded to the host where Banner resides.

Parameter Name	Required?	Description	Values
Data File	Yes	Enter the data file name with the complete path included.	
Test Flag	Yes	Enter Y to use a test flag or N to not use a test flag.	Y - Use test flag N - Do not use test flag
Upload Student RAP Segments	Yes	Enter Y to upload Student RAP segments or N to not upload Student RAP segments.	Y - Upload Student RAP segments N - Do not upload Student RAP segments
Upload Course RAP	Yes	Enter Y to upload	Y - Upload Course

Parameter Name	Required?	Description	Values
Segments		Course RAP segments or N to not upload Course RAP segments.	RAP segments N - Do not upload Course RAP segments

Note: There is no output produced by this process.

Electronic Data Interchange Extract (SHREDIY)

Updated: September 28, 2023

The Electronic Data Interchange Extract (SHREDIY) must be run in to produce Banner transcripts to be sent through EDI.Smart. A transcript must have been requested through the use of the Transcript Request Form (SHARQTC) or the Transcript Population Creation Process (SHRTPOP) to be produced through this process.

SHREDIY reads the requests from the collector file and generates the flat file entries for the transcripts along with control and log file entries. Only transcript requests with a send type of E, for EDI, will be processed. Transcripts may be produced for an individual with a pending request, or all requests which have been sent to the collector file. The Academic Transcript (SHRTRTC) must be run to produce Banner paper transcripts for those institutions who are not capable of receiving EDI transcripts. The Transcript Request Form (SHARQTC) will not allow an EDI transcript request to be made for an institution that is not EDI capable.

When each transcript is generated, SHREDIY will update the EDI sent date and assign each transcript request a request number on the Transcript Request Collector Table (SHTTRAN). The request number is a sequential number stored in the Sequence Number Base table (SOBSEQN) and updated by SHREDIY. The request number is sent to EDI.Smart in the control record for the generated transcript.

Each time you run the SHREDIY, a new file generates and the file has the sequence number added at the end of the file name. For example (sed*<sequence_no>.dat). The below mentioned .dat files have sequence_no on the file names.

- Sedictl1_<sequence_no>.dat

- Sediflt_<sequence_no>.dat
- edilog_<sequence_no>.dat
- Sedisgn_<sequence_no>.dat

The Grade Code or the Grade Abbreviation is printed depending on the selection of the **Grade Abbreviation instead of Grade Code** check box in the **Transcript Type Rules (SHATPRT) page > Print Options** section. When the check box is selected, a 6 characters Grade Abbreviation is printed, and when the check box is clear the Grade Code is printed. The printing of **Grade Abbreviation** on transcript supports all the file types, such as, html, .xml, .dat, and .lis files.

The process checks for the **Hide in Transcripts** check box on the **Course Maintenance (SHATCKN)** page. A student's courses will not appear on the transcript when you run the process for the .lis and .dat export files for a specific term if **Hide in Transcripts** check box for a course is selected.

The courses appear on the transcript if you clear the check box. The credit hours displayed on the transcript for the student will not have any impact based on the value of **Hide in Transcripts** check box and can be controlled by the **Repeat** or **System** fields on the SHATCKN page.

Parameter Name	Required?	Description	Values
Transcript Population File	No	Enter Y if the population for which the transcript(s) are to be generated has previously been selected through the Transcript Population Creation Process (SHRTPOP). Enter N if the population has not been pre-selected. The default is N.	Y - Population has been pre-selected by SHRTPOP N - Population has not been pre-selected
ID and [Sequence if Desired]	No	Enter % or a Null value to select all IDs and sequences.	

Parameter Name	Required?	Description	Values
Transcript Type	No	Enter the type of transcript requested.	Transcript Type Code Validation Form (STVTPRT)
Address Selection Date	No	Enter the date (format DD-MON-YYYY) for which you want to retrieve an active address record of the student for whom the transcript is being generated.	
Address Priority and Type	Yes	Enter the priority number and address type code (format 1MA) for the address selection.	
Campus Selection Indicator	No	Enter Y to select courses to be included on the transcript, which are associated with the campus codes entered. An N will include all course campus codes on the transcript. The default value is N.	Y - Include courses associated with campus codes entered N - Include all course campus codes
Campus Selection	Yes	(Required if Campus Selection Indicator is set to Y) Enter the course campus code representing the campus of the courses which are to be included on the transcript.	Campus Code Validation Form (STVCAMP)

Parameter Name	Required?	Description	Values
GPA Format	No	Enter R to print rounded GPAs or T to print truncated GPAs. The default value is R .	R - Round GPAs T - Truncate GPA
Process Rqsts Awaiting Grades	Yes	Use this parameter to process requests that learners want held until end of term grades have been rolled to academic history. Enter Y to process requests waiting for end of term grades or N to process requests that are not waiting for end of term grades. The default value is N .	Y - Process requests - waiting for grades N - Process requests - not waiting for grades
Process Rqsts Awaiting Degrees	Yes	Use this parameter to process requests that learners want held until their degrees have been posted to SHADEGR. Enter Y to process requests waiting for degrees to be posted or N to process requests that are not waiting for degrees to be posted. The default value is N .	Y - Process requests - waiting for degrees N - Process requests - not waiting for degrees

Degree Verification Process (SHRDEGV)

Updated: June 20, 2024

This process is used to collect data relating to the degrees a student has completed at an institution and supply the information to the National Student Clearinghouse.

The initial transmission from an institution to the NSC for degree verification requests all degree records. After this first transmission, records are submitted on a term-by-term basis.

SHRDEGV reports up to four majors and four minors with associated CIP codes. The curriculum information is pulled from the concurrent curricula tables in place of the backfill tables.

- The **Birth Date** field on SPAPERS is used by this report and must have a valid value.
- The **SSN/SIN/TIN** field on SPAPERS is not required. Degrees may be reported to the Clearinghouse without SSNs. If no SSN value exists, the requested wording NO SSN is printed and is padded with spaces (to nine characters) in the field, before being printed on the report.
- The **Graduation Date** field in the Graduation Information on SHADEGR is used by this report and must have a valid value. The program information is also required.
- The degree information is created when grades are rolled to history from SGASTDN. Make sure the **Create or Update Degree with Primary Curriculum** field on SOACTRL is set to Yes, in addition to the **Create or Update Degree with Secondary Curriculum** field, if that is applicable.

SHRDEGV uses the NSC Credential Level Translation code from the Degree Award Category Code Validation Form (STVACAT) to process degree levels.

Parameter Name	Required?	Description	Values
Processing Term	Yes	Enter the code for the degree awarded term, or enter % to select all terms. The initial transmission from an institution to the Clearinghouse	Term Code Validation Form (STVERM)

Parameter Name	Required?	Description	Values
		<p>for degree verification requests all degree records. After the first transmission, records are submitted on a term-by-term basis.</p> <p>This must match the value in the Graduation Term field in the Graduation Information on SHADEGR for the graduation term.</p>	
Degree Status Code	Yes	<p>Enter the code for the status of the awarded degree. This must match the value in the Outcome Status field in the Outcome Information on SHADEGR. Multiple values may be entered in this parameter.</p>	Degree Status Code Validation Form (STVDEGS)
Degree Period	Yes	<p>Enter the description of the period when the degree was awarded (i.e., Spring, 2001). This is a free format description of up to 15 characters.</p>	

Parameter Name	Required?	Description	Values
Run Mode	Yes	Enter the mode in which you want to run the report. Enter 1 to produce a report of missing data or data that is not valid and the error encountered during processing. Enter 2 to produce a report of students who have been processed. Enter 3 to produce a delimited extract file to be transmitted to the Clearinghouse using EDI.	1 - Missing data / data not valid 2 - Students processed 3 - EDI file
Sort Order	No	Enter the order in which the process should sort the data. Enter 1 for sorting by Last Name. Enter 2 for sorting by Level/Last Name. Enter 3 for sorting by Degree/Last Name. The default sort order is by Last Name.	1 - Last Name 2 - Level/Last Name 3 - Degree/Last Name
Hold Codes to be Excluded	No	Enter the hold codes used to exclude students from being reported to the Clearinghouse. Hold codes must be active on SOAHOLD for the	Hold Type Code Validation Form (STVHLDD)

Parameter Name	Required?	Description	Values
		student for the dates that encompass the term.	
Banner ID	No	Enter Y to include the Banner ID in the output or leave Null to not include the Banner ID.	Y - Include Banner ID Null - Do not include Banner ID

Note: The output file is not available through the Saved Output Review (GJIREVO) page because the file layout has lines longer than GJIREVO can handle: GJIREVO can only accommodate 2000 characters while SHRDEGV can accommodate 3841 characters. You can find and download the file from the Saved JobSub Reports (GJAJLIS) page, which is SaaS-friendly.

Progress Evaluation Process (SHRPREV)

Updated: August 27, 2020

This process is used to determine progress evaluation and combined academic standing codes and print a report of the results.

This process can also calculate the progress evaluation code and combined academic standing code of students specific to study paths if the institution uses study paths. It will calculate each student's maximum registration hours allowed based upon their combined academic standing code. The process can be run in Update or Audit mode.

Before running this process, make sure to set up valid codes on STVPREV and STVCAST, and that valid rules are set up on SHAACST (for the SHRCAST, SHRPREV, and SHRPRGE blocks), and that the Minimum Percentage Controls value on SHACTRL is reviewed and set up. Run the Calculate Academic Standing Report (SHRASTD) at least one time in Update mode for the term code being processed before SHRPREV is run. This is to make sure that the student academic standing codes have been assigned. Select the **Process GPA by Study Path** check box in the Academic History Control (SHACTRL) page for the study path specific standings to be calculated.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term code for the term to be processed.	Term Code Validation Form (STVTERM)
Determine Progress Evaluation	Yes	Enter Y to determine the progress evaluation, or enter N to exclude this information.	Y - Progress evaluation N - No progress evaluation
Determine Combined Academic Standing	Yes	Enter Y to determine the combined academic standing, or enter N to exclude this information.	Y - Combined academic standing N - No combined academic standing
Update/Audit Mode	Yes	Enter A to run the report in Audit mode, or enter U to update the database. The default is A.	A - Audit mode U - Update mode
Calculate Max Reg. Hours	Yes	Enter Y to compare the new combined academic standing code's hours to future existing registrations, or enter N to not check this information.	Y - Compare code hours N - No comparison
Pre-registration Future Terms	No	Enter the term code for the future term to be used in the comparison of future term registration to the new combined academic standing code's registration hours.	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		This parameter may only be used when the Calculate Max Reg. Hours parameter is set to Y.	
Maximum Hours Update/Audit	No	<p>Enter U to update future terms to new maximum hours, or enter A to audit this information. The default is A.</p> <p>This parameter may only be set to U when the Calculate Max Reg. Hours parameter is set to Y.</p>	<p>U - Update maximum hours</p> <p>A - Audit maximum hours</p>
Student ID	No	<p>Enter a specific student ID or enter % for all.</p> <p>This parameter should not be used if the following population selection parameters are used.</p>	
Selection Identifier	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection	Population Selection Inquiry Form (GLISLCT)

Parameter Name	Required?	Description	Values
		Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	
Application Code	No	<p>Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered.</p> <p>The Population Selection Extract Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.</p>	Application Inquiry Form (GLIAPPL)
Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
User ID	No	Enter the user ID for the population	

Parameter Name	Required?	Description	Values
		selection. This is the ID of the user who selected the population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Print Detail	Yes	Enter <code>Y</code> to print detail lines, or enter <code>N</code> to only print error messages and total pages. The default is <code>N</code> .	Y - Print detail N - Print error messages

PESC/XML Transcript Export Process (SHRPESE)

Updated: September 28, 2023

This Java process is used to create electronic transcripts in XML format by producing a `.xml` file that can be read by the receiving institution.

It also produces `.lis` and `.log` file entries. It uses the file transfer protocol information on SOASBGA to send the transcript to an institution. The process reads XML transcript requests from the collector records and extracts those with a transcript type of `P` (`PESC/XML`) from the **Electronic** field on STVSBGI and a transcript type of `XML` on SHATPRT.

To use this process, a transcript must have been requested through SHARQTC or SHRTPOP (using population selection), or online using self-service. SHRPESE reads the requests from the collector file and generates the XML for the transcripts along with control and log file entries. Only official transcript requests with a send type of `P` will be processed.

Transcripts may be produced for an individual with a pending request or for all requests

which have been sent to the collector file. When each transcript is generated, SHRPESE will update the **Status** and **Status Date** fields in the Electronic Transcript Status information on SHARQTC. If no errors have occurred, the **Run Date** value will also be populated.

The Grade Code or the Grade Abbreviation is printed depending on the selection of the **Grade Abbreviation instead of Grade Code** check box in the **Transcript Type Rules (SHATPRT) page > Print Options** section. When the check box is selected, a 6 characters Grade Abbreviation is printed, and when the check box is clear the Grade Code is printed. The printing of **Grade Abbreviation** on transcript supports all the file types, such as, html, .xml, .dat, and .lis files.

The process checks for the **Hide in Transcripts** check box on the **Course Maintenance (SHATCKN)** page. A student's courses will not appear on the transcript when you run the process for the .html and .xml export files for a specific term if **Hide in Transcripts** check box for a course is selected.

The courses appear on the transcript if you clear the check box. The credit hours displayed on the transcript for the student will not have any impact based on the value of **Hide in Transcripts** check box and can be controlled by the **Repeat** or **System** fields on the SHATCKN page.

Name	Required?	Description	Values
Transcript Population File?	Yes	Enter Y if the transcript population was previously selected using SHRTPop or N if no transcript population file exists. The default is N.	Y - Transcript population exists from SHRTPop N - Transcript population does not exist
ID and Seq No as XXXXXXXXXX000	No	Enter the ID number as the first nine characters (XXXXXXXXXX) and the sequence number as the last three characters (000). Enter % or	

Name	Required?	Description	Values
		leave the parameter value blank to select all IDs and sequence numbers. The default is %.	
Transcript Type	Yes	Enter the transcript type. Multiple values are allowed. The default is % for all types.	Transcript Type Code Validation Form (STVTPRT)
Address Selection Date	No	Enter the date used to select the appropriate address in format DD-MON-YYYY.	
Address Priority and Type	Yes	Enter the address priority followed by the address type, such as 1MA for a first priority mailing address.	
Campus Selection Identifier	No	Enter Y to select a campus or N to not select a campus. The default is N.	Y - Select campus N - Do not select campus
Campus Selected	No	If you entered Y in the Campus Selection Identifier parameter, enter the campus code for the campus to be processed.	Campus Code Validation Form (STVCAMP)
GPA Format	No	Select the GPA format for the transcript. Enter R for the rounded GPA	R - Rounded GPA T - Truncated GPA

Name	Required?	Description	Values
		format or T for the truncated GPA format. The default is R.	
Run in Sleep/Wake Mode	Yes	Enter Y to run the process in sleep/wake mode or N to not use this option. The default is N.	Y - Run in sleep/wake mode N - Do not use sleep/wake
Sleep/Wake Interval	Yes	Enter the time in seconds for the sleep/wake interval. Valid values are 0 – 99999. The default is 60.	
XML Document Process Code	Yes	Enter TEST to run create output for a test environment or PRODUCTION to create output for a production environment. The default is TEST.	TEST - Test environment PRODUCTION - Production environment
Self-Reported Test Source	Yes	Enter the value for self-reported test scores. The default is STDN.	Admission Test Score Source Code Validation Form (STVTSRC)
Domestic Address Nation Code	Yes	Enter the nation code for the domestic address. Multiple values are allowed. The default is US. The nation code description is printed	Nation Code Validation Form (STVNATN)

Name	Required?	Description	Values
		on the report. So while 157 is the nation code, US is the nation code description that is used for the default.	
Email Type Hierarchy	Yes	Enter the email type to be used (such as 1CAMP for first priority campus email) if no preferred email address exists. Multiple values are allowed.	E-mail Address Type Validation Form (GTVEMAL)

PESC/XML Transcript Import Process (SHRPESI)

Updated: August 27, 2020

This Java process is used to import XML transcript files into an institution from other institutions. It reads files from a server, loads them to a temporary table, renames the files (.old), and then loads the data to Banner using rules set up on STVDSTS.

The process checks for duplicate records in Banner. The duplicate records will be noted in the .lis file by file name, document ID, Banner document sequence number, and the message: *Document has already been processed*. New records will be loaded with the same information as above, but the message will read *Transcript Document Imported*.

New records can be viewed and routed on SHAEDIS before they are imported. Matched records can be processed and verified using GOAMTCH and then articulated using SHATAEQ. The decision to load transcripts can also be made on SHATAEQ.

Note: Data is imported into existing Banner EDI tables. Additional UDE (User-Defined Extensions) data is imported into new tables based on code written by the institution.

Parameter Name	Required?	Description	Values
Run in Sleep/Wake Mode	Yes	Enter Y to run the process in sleep/wake mode or N to not use this option. The default is N.	Y - Run in sleep/wake mode N - Do not use sleep/wake
Sleep/Wake Interval	Yes	Enter the time in seconds for the sleep/wake interval. Valid values are 0 – 99999. The default is 60.	
XML File Directory	No	Enter the name of the absolute directory from which the XML files are pulled. The \$DATA_HOME directory is used if no value is entered.	

Transfer Catalog Data Import Process (SHRTCIM)

Updated: August 27, 2020

This Java process is used to import an XML extract file of course catalog data into a Banner database.

After entering the input file name and other default values, the user can choose between running the process in Audit Mode or Update Mode. In Audit Mode, the process compares the records in the incoming data file with transfer course records that already exist in the system. Records in the incoming data file that are found to match existing records will be identified as partial or exact matches.

When run in Audit Mode, the process calls the SB_TRANSFER_COURSE API for matching logic.

- If an incoming transfer course does not match any existing transfer courses based on the institution ID plus the subject plus the course number plus the transfer level, then it will be identified as a new record.
- If an incoming transfer course matches an existing transfer course based on institution ID, plus the program, plus the transfer level, plus the subject, plus the course number, plus the effective term, plus the group, then it will be identified as an exact match (even though values in the Title, Credit Hours Low, Credit Hours High, Minimum Grade, Catalog Year, and Course Description fields may differ).

Note: Existing transfer courses that have been entered with a value in the Program or Group or both fields will not match incoming transfer course records. As such, many incoming transfer course records that do match existing records based upon institution ID, plus transfer level, plus the subject, plus the course number, plus the effective term will fall into the next category.

- If an incoming transfer course does not satisfy the criteria to be identified as new or an exact match, then it will be flagged as a partial match.

After the input file has been processed in Audit Mode, users can review those courses identified as exact matches to see if any data exists in the Title, Credit Hours Low, Credit Hours High, or Course Description or all of those fields that should be added to the system. If not, you can check the **Protect from Import** field for the existing transfer courses in the Transfer Institution Catalog Entry Form (SHATATC) or the Transfer Course Articulation Form (SHATATR). Those courses will not be updated when the input file is processed again in Update Mode.

Similarly, after the input file has been processed in Audit Mode, users can review those courses identified as partial matches to see if any data exists in the Title, Credit Hours Low, Credit Hours High, or Course Description or all of those fields that should not be added to the system. If so, the **Protect from Import** field can be checked for those records, and those courses will not be updated when the input file is processed again in Update Mode.

When the process is run in Update Mode, new records from the input file are imported into the SHBTATC and SHRTCAT tables. Records identified as exact matches will update the existing records unless the **Protect from Import** field is checked. Records identified as partial matches will update existing records if the matched fields are the institution ID, effective term, transfer level, subject, and course number, unless the **Protect from Import** field is checked. Otherwise, the partial matches will be loaded as new courses.

The process is modified to store the new `CourseAlias` details in Banner SHATATC page

within SHRTADI table on import.

Banner Table	Table Column	Additional Information
SHBTATC		Transfer Course Information
	SBGI_CODE	Institution ID parameter
	PROGRAM	Defaults to
	TLVL_CODE	Comes from <CourseLevelCode> Value must be defined on STVTLVL and be valid for the institution ID on SOABGTA.
	SUBJ_CODE_TRNS	Comes from <CourseSubjectAbbreviation > Value is not validated by Banner.
	CRSE_NUMB_TRNS	Comes from <CourseNumber>
	TERM_CODE_EFF_TRNS	Effective Term parameter
	ACTIVITY_DATE	Defaults to system date
	TRNS_TITLE	Comes from <CourseShortTitle>
	TRNS_LOW_HRS	Comes from <CourseCreditMinimumValu e>
	TRNS_HIGH_HRS	Comes from <CourseCreditMaximumValu e>
	TRNS_REVIEW_IND	Defaults to N
	TAST_CODE	Status Code parameter
	TRNS_CATALOG	Catalog Year parameter
	TGRD_CODE_MIN	Minimum Grade parameter

Banner Table	Table Column	Additional Information
	GROUP	Defaults to NULL
	GROUP_PRIMARY_IND	Defaults to NULL
	CRSE_DESC	Comes from <CourseDescription>
	USERID	Defaults to user ID of person running the process
	DATA_ORIGIN	Defaults to either SHATATC, SHATATR, or SHRTCIM
	PROTECT_IND	Defaults to N
SHRTCAT		Transfer Course Attributes
	SBGI_CODE	Institution ID parameter
	PROGRAM	Defaults to "....."
	TLVL_CODE	Comes from <CourseLevelCode> Value must be defined on STVTLVL and be valid for institution ID on SOABGTA.
	SUBJ_CODE_TRNS	Comes from <CourseSubjectAbbreviation> Value is not validated by Banner.
	CRSE_NUMB_TRNS	Comes from <CourseNumber>
	TERM_CODE_EFF_TRNS	Effective Term parameter
	ATTR_CODE	Comes from <RAPCode> Value is not validated by Banner.
	ATTR_DESC	Comes from <RAPName>

Banner Table	Table Column	Additional Information
	USERID	Defaults to user ID of person running the process
	ACTIVITY_DATE	Defaults to system date
	DATA_ORIGIN	Defaults to SHRTCIM
SHRTADI	CRSE_ALIAS	Comes from <CourseAlias>

Parameter Name	Required?	Description	Values
Input File	Yes	<p>Enter the name of the file that contains the incoming records.</p> <p>For example: catalogexport_<oneup>.xml</p> <p>The process retrieves the input file from the directory defined for FILE_PATH="-Dxml.file.path=" in the shell file that launches the program. As delivered, this directory is defined as \$DATA_HOME/Student; however, your institution can designate a different directory if desired.</p>	
Run Mode	Yes	Enter A for Audit Mode (compares incoming records to	A - Audit Mode U - Update Mode

Parameter Name	Required?	Description	Values
		existing ones) or U for Update Mode (imports the data into Banner). The default is A.	
Institution ID	Yes	<p>Enter the source/background institution code to be loaded as the institution ID for the incoming records.</p> <p>In Audit Mode, this value is used to select existing records for comparison. In Update Mode, this value is loaded into the SHBTATC table for each incoming transfer course record.</p>	Source/Background Institution Code Validation Form (STVSBGI)
Effective Term	Yes	<p>Enter the effective term to be loaded for the incoming records.</p> <p>In Audit Mode, this value is used to select existing records for comparison. In Update Mode, this value is loaded into the SHBTATC table</p>	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		for each incoming transfer course record.	
Level Code	No	Enter the transfer course level codes to be loaded for the incoming records. If an incoming record has multiple levels associated with it, only those matching the values entered in the parameter will be processed.	Level Code Validation Form (STVLEVL)
Status Code	Yes	Enter the status code to be loaded for the incoming records. In Audit Mode, this value will not be used to select existing records for comparison.	Transfer Articulation Course Status Validation Form (STVTAST)
Minimum Grade	No	Enter the minimum grade code (SHATGRD) to be loaded for the incoming records. In Audit Mode, this value will not be used to select existing records for comparison.	
Catalog Year	No	Enter the catalog year to be loaded for the incoming	

Parameter Name	Required?	Description	Values
		records. In Audit Mode, this value will not be used to select existing records for comparison.	
Load Course Attributes	Yes	Enter Y to load course attributes or N to not load course attributes. The default is Y.	Yes - Load attributes No - Do not load attributes
Report Type	Yes	Enter D to create a detailed report or S to create a summary report. The default is S.	D - Detail S - Summary
Sort Order	Yes	Enter 1 to sort the output by load status and then by subject and course number or 2 to sort the output by subject and course number only. The default is 1.	1 - Sort by load status 2 - Sort by subject and course number
Display Full Subject	Yes	Enter Y to display the full, 60 character subject name on the line below the course data or N to not display the subject name. The default is N. Currently, the entire length of 10 characters that is allowed for the	Yes - Display full subject name No - Do not display subject name

Parameter Name	Required?	Description	Values
		<p>subject code will be displayed on the report, even if this parameter is set to N. As such, you will not need to set it to Y. However, if the PESC schema that is adopted as a standard allows for a value of 60 characters (as the EDI standard does), you may want to set this parameter to Y to see the entire value.</p>	
Display Full Course Number	Yes	<p>Enter Y to display the full, 60 character course number on the line below the course data or N to not display the course number. The default is N.</p> <p>Currently, the entire length of 15 characters that is allowed for the course number will be displayed on the report, even if this parameter is set to N. As such, you will not</p>	<p>Y - Display full course number</p> <p>N - Do not display course number</p>

Parameter Name	Required?	Description	Values
		need to set it to Y. However, if the PESC schema that is adopted as a standard allows for a value of 60 characters (as the EDI standard does), you may want to set this parameter to Y to see the entire value.	
Display Course Description	Yes	Enter Y to display the course description text or N to not display the course description. The default is N.	Y - Display course description N - Do not display course description

Incomplete Grade Process (SHRCINC)

Updated: August 27, 2020

This process is used to automatically update incomplete grades to final grades. If an incomplete grade is found on Academic History for any course within the specified terms, and its grade extension date is less than or equal to the current system date, it is selected for processing.

Note: The process scans only Academic History records. All grades on the class roster that have not yet been rolled are still considered to be in-process.

The grade code values that are displayed on SFAALST, SFASLST, and in Banner Faculty and Advisor Self-Service are only those grade codes that were last entered on the class roster. Any grades that have been subsequently updated in history are not reflected in the roster.

This process can be run by term in either Audit or Update Mode and includes reason codes for the grade changes, and grade comments for the grade entries. You can restrict the process selection by level or CRN or both. You can include student IDs on the output and calculate GPAs in Update Mode if you want to do so. The incomplete grade code value that is selected and the final replacement grade are also printed in the output. If grade substitution is needed, you can choose to have the grade substitution grade code printed on the report.

The grade extension date for incomplete grades is compared against the system date to determine whether a grade change needs to occur. If a grade change is needed, a new grade entry is created for the course in the student's academic history. If the system date is greater than the incomplete extension date, then a new grade entry is inserted, but with the final grade code changed from the incomplete grade entry to the replacement final grade. The process also performs checking for grade substitution. Grade substitution can replace the updated grade with a substitute grade, based upon the grade mode associated with the student that was taking the course. A GPA recalculation is then performed when the Calculate GPA parameter is set to `Y`, and the process is run in Update Mode.

The process can be run in Audit Mode to forecast automated grade change results for upcoming grade conversions. The Future Date parameter can be used to forecast future results. No GPA calculation is performed in Audit Mode.

The process can be run Update mode (Run Mode = 'U'pdate) and if the **Calculate the GPA** parameter is set to **'Yes'**, then this process calculates the GPA by Study Path. The process will not perform any GPA calculation by Study Path if the process is run in 'A'udit Mode. The Study Path calculations are not calculated for campus GPA and Student Centric Period.

Note: This process does not use sleep wake processing.

Grade Conversion and Substitution

Updated: August 27, 2020

The process creates a new grade revision entry in the SHRTCKG table.

The existing, current, incomplete entry is maintained in Academic History. This update is processed as a non-destructive grade change. The new entry is added as the next sequence number, and the final grade code is extracted from the incomplete final grade

of the prior entry. The extension date is cleared for the new entry. The reason code comes from the Reasons Code parameter, and the current system date is used as the grade date. If a grade code comment is specified, it will be added to the new grade entry.

The default, incomplete, final grade is the assigned final grade of the new grade change entry. That may cause a second grade change entry to be posted for the grade substitution. The processing for the grade substitution is automatically invoked at the time the first grade change is posted. The reason code on the grade substitution entry (if one is needed) uses SG (substitute grade) as the reason code, and no grade comment code will appear on that entry. SG is a system-defined reason code used for substituted grade change entries. A second entry will be printed on the report output for the substitute grade change (by default) unless the Print Grade Substitutions parameter is set to N.

If grade substitution is needed for the incomplete final grade, then the substitution grade value must be reconciled to exist before the first grade change entry is posted. A final grade cannot be changed to a grade value that is inconsistent with the grade mode for which the student is taking the course, except when the grade is immediately replaced with a substitute grade value.

If grade substitution is required and a substitute grade is not on file, then neither grade change will be posted, and an error message will be displayed in the output. When the grade substitution is complete, the GPA recalculation can take place, if the Calculate GPA parameter is set to Y.

Parameter Name	Required?	Description	Values
Term Code	Yes	Enter the term codes for automated processing of incomplete grades.	Term Code Validation Form (STVTERM)
Level Code	No	Enter the level codes for automated processing of incomplete grades.	Level Code Validation Form (STVLEVL)
Course Reference Number (CRN)	No	Enter CRNs for courses for automated processing of incomplete grades, if	

Parameter Name	Required?	Description	Values
		you want to restrict the processing to only these CRNs within the term.	
Reason Code	Yes	Enter a user-defined reason code to be stored with grade change entries that indicates the reason or justification for the grade change.	Grade Change Code Validation Form (STVGCHG)
Print Student ID	Yes	Enter I to include/print the student ID or E to exclude/not print the ID. The default is I .	I - Print student ID E - Do not print student ID
Page Break	Yes	Enter T to break the output by change of term, C to break the output by change of course within term, or N to have no forced page brake. The default is T .	T - Page break by term C - Page break by course N - No forced page break
Run Mode	Yes	Enter A to run the process in Audit Mode and forecast automated grade change results or U to run the process in Update Mode and update the database. The default is A .	A - Audit Mode U - Update Mode
Future Date	No	Enter a date in the future (DD-MON-YYYY format) to	

Parameter Name	Required?	Description	Values
		compare to extension dates of entries on file. This date takes the place of the system date. This parameter can only be used in Audit Mode.	
Grade Comment	No	Enter a grade comment code to be stored with grade change entries. You may want to define a grade comment code to reflect that this grade change entry is the result of automated incomplete grade processing.	Grade Comment Code Validation Form (STVGCMT)
Calculate GPA	Yes	Enter Y to calculate the GPA for each student that is processed or N to not calculate the GPA. The default is N.	Y - Calculate GPA N - Do not calculate GPA
Print Grade Substitutions	Yes	Enter Y to print grade substitutions or N to not print grade substitutions. The default is Y.	Y - Print grade substitutions N - Do not print substitutions
User ID	Yes	Enter the user ID to be stored with the grade records.	

Roll Learner to Outcome Process (SHRROUT)

Updated: August 27, 2020

This process is used to roll learner curriculum records to the outcome curriculum and then insert new degree sequence records.

This process does not replace or duplicate SHRROLL, which examines all learner records and only creates new outcome records when one does not exist for the curriculum being processed. This process is intended to assist users who do not regularly roll learner curricula to outcome when rolling grades.

This assists users by allowing the degree and outcome to be created when a degree or certificate is ready to be awarded. You can select a group of students using population selection or enter individual Banner IDs. The process will read the population, find the current curriculum record for the effective term, and roll that data to the outcome for any curricula that have not been rolled. When SHRROUT is run, the curriculum records will be rolled, even when the **Roll Learner** radio group is set to **No**.

Note: The setting of the **Roll Learner** radio group is not considered if the process is submitted manually using the **Roll to Outcome** button on SGASTDN or SFAREGS. The **Roll Learner** radio group can be set to **No**, and the user can still roll the curriculum manually. The grade roll (SHRROLL) will only roll the learner curriculum record if the **Roll Learner** radio group is set to **Yes**.

If neither a population selection group or Banner IDs are entered, the graduation application term, graduation application status to and from dates, or graduation application status must be entered. When graduation information is entered, the graduation application is selected along with all of the associated curriculum data. If the graduation application has an associated outcome curriculum, only those records will be selected, and the outcome will be updated with graduation application data, providing the outcome has not been awarded. If no graduation information is entered, the unrolled, current, active learner curriculum is selected for the learner effective term and is rolled.

You can run the process in Audit or Update Mode so records can be reviewed before they are rolled and committed to the database. Using Audit Mode will execute all the necessary processes except the SHKROLS procedure. The degree information returned from SHKROLS will not be printed on the output until the process is run in Update Mode.

You also have the option to produce a detailed report or a summary of totals. The detailed report shows the primary and any secondary curriculum data (program, level,

college, campus, primary majors, and so on) that will be created in the SHADEGR record and the degree sequence number that will be associated with the curriculum, application number, status, and date.

The process provides an option to apply all existing graded and rolled courses (transfer and institutional) to the degree sequence that is created, as long as the courses have not been already applied to a degree with an awarded status. If graduation application selection criteria are entered and the degree already exists for the graduation application, the degree and diploma records are updated with data from the graduation application (graduation date, term, year, graduation status, and outcome completion term). The graduation application status exist, but the graduation application term and dates can be left blank. The application that is found must have an active status. The graduation application date range is selected from the date in the SHBGAPP table, not the date stored in the SHRDGMR table.

The process populates the **Roll to Outcome** field in SGASTDN, SFAREGS, and SOILCUR to show that the curriculum record has been used to create a degree and an outcome record. It also inserts the graduation application sequence number for the curriculum in the SORLCUR and SHADEGR records.

Diploma data (diploma name and address) can be inserted into SHBDIPL for the degree sequence number if the diploma data exists in SHBGAPP when the roll is executed. Indicators in the **Diploma Name/Address Options** window in SHAGADR are used to insert diploma data when the self-service application is submitted.

Note: This roll is independent of the Grade Roll to Academic History (SHRROLL).

Parameter Name	Required?	Description	Values
PopSel Application	No	Enter the code that identifies the general area for which the selection identifier was defined. All or none of the population selection parameters must be entered. The Population Selection Extract	Application Inquiry Form (GLIAPPL)

Parameter Name	Required?	Description	Values
		Inquiry Form (GLIEXTR) may be used to review the people who will be processed in the load from the selection identifier and application code entered.	
PopSel Selection ID	No	Enter the code that identifies the population with which you want to work. The selection identifier must be defined on the Population Selection Definition Rules Form (GLRSLCT). All or none of the population selection parameters must be entered.	Population Selection Inquiry Form (GLISLCT)
PopSel Creator ID	No	Enter the user ID of the person who created the population rules. All or none of the population selection parameters must be entered.	
PopSel User ID	No	Enter the user ID for the population selection. This is the ID of the user who selected the	

Parameter Name	Required?	Description	Values
		population of people. This may or may not be the same as the Creator ID. All or none of the population selection parameters must be entered.	
Banner ID	No	Enter a valid SPRIDEN ID for the student to be rolled. Multiple IDs can be entered.	Person Search Form (SOAIDEN)
Graduation Application Status	No	Enter the graduation application status code. Multiple codes can be entered.	Graduation Application Status Validation Form (STVGAST)
Grad Appl Status From Date	No	Enter the from date for the graduation application status.	
Grad Appl Status To Date	No	Enter the to date for the graduation application status.	
Graduation Application Term	No	Enter the term code for the graduation application. Multiple terms can be entered.	Term Code Validation Form (STVTERM)
Graduation Year	No	Enter the academic year code for the graduation year. Multiple years can be entered.	Academic Year Validation (STVACYR)
Effective Term Code	Yes	Enter the term code for the effective term from which the	Term Code Validation Form (STVTERM)

Parameter Name	Required?	Description	Values
		<p>learner curriculum should be selected.</p> <p>This parameter is required if no graduation application information has been entered in SGBSTDN for the effective term.</p>	
Apply Courses	No	<p>Enter Y to apply courses to a new degree or N to not apply courses. The default is Y.</p> <p>If left blank, the setting of the Award Graded Courses to New Degree check box on SHACTRL will be used.</p>	<p>Y - Apply courses to new degree</p> <p>N - Do not apply courses</p>
Run Mode	Yes	Enter A to run the process in Audit Mode or U to run the process in Update Mode and update the database. The default is A.	<p>A - Audit Mode</p> <p>U - Update Mode</p>
Print Mode	Yes	Enter D to produce a detailed report or S to only print totals. The default is S.	<p>D - Detailed output</p> <p>S - Summary output of totals</p>

eTranscript Export Process (SHRETRN)

Updated: September 28, 2023

The eTranscript Export Process (SHRETRN) is used to produce the transcript order output in PDF format.

This is a Java process that can be run from job submission (for exception processing only) by ID and sequence number, transcript type, address selection date, address priority and type, and Order ID. It is also run when a request is sent to the queue by the order status package to process the transcript request.

Exception processing refers to when an error occurs during the PDF generation, but the SHTTRAN record is updated. You can create a duplicate record and run SHRETRN to send the PDF manually.

SHRETRN produces XML and PDF output. The XML output is not PESC compliant and is used for the PDF generation only. It contains Banner values instead of the PESC values produced by the SHRPESE process. 50 user-defined elements are provided to accommodate the data elements from the SHATPRT print option rules.

This process is called by the SHKEORS order status package when the status of the order is RG - Ready to Generate. The order status package inserts a record into the SHTTRAN transcript request table, and then calls the SHKEBLD package, which sends a request to the queue for processing. SHRETRN can also be run from job submission.

SHRETRN uses SFTP transfer to automatically send the electronic PDF output to the vendor drop box. If the SFTP process fails, an automatic number of retries is built in. Three retries are attempted, each 60 seconds apart. When the retries fail, the eTranscript SFTP Transmission Resend Form (SHASFTP) displays the errors and allows you to attempt a manual resend of the files individually or in a group. A record is written to the SHRSFTP table, and the generated PDF is stored in a BLOB column.

The following files are used with this process.

- shretrn.jar
- shretrn.shl
- shretrn.pl
- shretrn_template.xsl

A baseline PDF template is delivered for use with SHRETRN. An Adobe Formatting Objects Processor (FOP) tool is used to create a style sheet for the transformation of the data to XML. Data elements (print options) from SHATPRT are included in the template. You can create your own templates and link them to Banner transcript types.

The eTranscript PDF Printer Rule Form (SHRPDFT) is used to map the Banner transcript type to specific PDF templates for electronic PDF transmission and to specific printers for paper (hardcopy) transcripts. Banner transcript types must be defined on SHATPRT to be used on SHRPDFT.

The Grade Code or the Grade Abbreviation is printed depending on the selection of the **Grade Abbreviation instead of Grade Code** check box in the **Transcript Type Rules (SHATPRT) page > Print Options** section. When the check box is selected, a 6 characters Grade Abbreviation is printed, and when the check box is clear the Grade Code is printed. The printing of **Grade Abbreviation** on transcript supports all the file types, such as, html, .xml, .dat, and .lis files.

The process checks for the **Hide in Transcripts** check box on the **Course Maintenance (SHATCKN)** page.

The courses appear on the transcript if you clear the check box. The credit hours displayed on the transcript for the student will not have any impact based on the value of **Hide in Transcripts** check box and can be controlled by the **Repeat** or **System** fields on SHATCKN page.

Parameter Name	Required?	Description	Values
ID and Sequence Number	Yes	Enter the combined ID and sequence number for the transcript. The ID is the first nine characters. The sequence number is the last three characters,	
Transcript Type	Yes	Enter the transcript type to be processed.	
Address Selection Date	No	Enter the date used to select the	

Parameter Name	Required?	Description	Values
		appropriate address.	
Address Priority and Type	Yes	Enter the address priority and address type, such as 1MA. Multiple values can be entered.	
Order ID	Yes	Enter the unique transcript order/ suborder number assigned by the vendor.	
Domestic Address Nation Code. Note: This parameter is applicable to EDI and XML transcripts only. Institutions using PDF transcripts do not require this parameter.	Yes	Enter the nation code of the institution as defined in STVNATN.	

eTranscript Listener Start Up Process (SHRQINI)

Updated: August 27, 2020

This process initializes the SHRADVQ listener process to be run in the background, where it listens for Oracle advanced queue calls to execute eTranscripts processing. It can be run from job submission.

Parameter Name	Required?	Description	Values
Number of Listeners to Start	Yes	Enter the number of advanced queue listeners to be started from	

Parameter Name	Required?	Description	Values
		SHRADVQ. The default is 10.	

eTranscript Advanced Queue Process (SHRADVQ)

Updated: August 27, 2020

This process is a listening agent for Oracle advanced queue processing. It tells advanced queuing to perform eTranscripts processing. Run the SHRQINI process to start the SHRADVQ process. There are no job submission parameters for this process.

GTVSDAX rules with SHRADVQ

This GTVSDAX rule can be used with advanced queue processing for eTranscripts.

Internal Code	Internal Code Group	External Code	Description
QUEUETIME	QUEUETIMEOUT	300	SFRADVQ/SHRADVQ timeout in seconds

The `QUEUETIME` rule is used to change the timeout period for the advanced queue process. The delivered default timeout period is 300 seconds (five minutes). You need to set the rule to the timeout value you choose for the queue to work with the advanced queuing. The SOKADVQ package uses the `QUEUETIME` rule.

The `QUEUETIME` rule is equivalent to the `PIPETIME` GTVSDAX rule. The `QUEUETIME` rule states the amount of time the user is willing to wait for a response for eTranscripts processing while using the advanced queuing option, while the `PIPETIME` rule denotes the amount of time the user is willing to wait for a response for the compliance processing while using pipes processing.

Advanced queuing is a requirement of eTranscripts processing. The GTVSDAX rule is not delivered with the Banner Student 8.6.2 release and must be verified during the upgrade process.

eTranscript Cloud Post Process (SHRPOST)

Updated: August 27, 2020

This process is called when paper and PDF transcripts are initiated, and it sends an order status update to the Ellucian Cloud.

It is a Java process that is run automatically. The notification is sent based on the order status when the status is changed to **TF** - Transmission Failed, **FF** - Order Fulfilled, or **FO** - Offline Record Sent. SHRPOST receives the order status in the form of PESC Transcript Response (XML) and posts the XML to the Ellucian Cloud through a RESTful Web Service call.

After an order is processed by SHRETRN or SHRTRTC, the order is saved to a queue to be picked up by the SHRPOST process. This sends the order statuses of **FF**, **FO**, and **TF** to the Ellucian Cloud and **FF** and **FO** to the vendor.

The following files are used with this process:

- shrpost.jar
- shrpost.shl
- shrpost.pl

Parameter Name	Required?	Description	Values
Order ID	Yes	Enter the unique transcript order and suborder number assigned by the vendor.	

Drop Roster Status List Process (SFRROST)

Updated: August 27, 2020

This report was created to support the Drop Roster functionality and is used to view the CRNs that will be affected by the drop roster rules established on the Drop Rules Roster (SFARORL) page.

The output lists all of the CRNs that match the job parameters and the drop rosters related to each CRN based on the matching drop roster rules or history. The details listed include the type(s) of drop rosters available for each CRN, the date ranges of availability, and the date the roster was last submitted.

Parameter Name	Required?	Description	Values
Term	Yes	Code of the term for which you want to view a drop roster status list.	Term Code Validation (STVTERM) page
District ID	No	ID of the district or college. If you want to select all District IDs, enter %.	District/Division Code Validation (GTVDICD) page
Part of Term	No	Part of term code for which you want to view a drop roster status list. If you do not want to limit selection by this parameter, enter %. If you want a specific part-of-term's CRNs, enter the part-of-term code.	Part of Term Code Validation (STVPTRM) page
Primary Instructor ID	Yes	ID of the primary instructor of a course for which you want to view a drop roster list. If you want to select all faculty IDs, enter %.	
Drop Roster Type	Yes	Type of drop roster.	%: All types (default) TR: Total OR: Opening day

Parameter Name	Required?	Description	Values
			CR: Census WR: Withdrawal grade
Unsubmitted Rosters Only	Yes	Indicates whether only unsubmitted rosters are to be included.	Y: List only Rosters that are not yet submitted. N: List all CRNs and Rosters
Sort Option	Yes	Indicator for the order into which you want the records sorted.	1: Sort by ID code first, then by CRN (default) 2: Sort by CRN only 3: Sort by part-of-term term code first, then by CRN

Financial Aid

Updated: August 27, 2020

SUSI File Import (SOPSUIM)

Updated: August 27, 2020

This process allows the administrator to import the data received from the SUSI files. This process is common for all the types of file.

The administrator must enter valid parameters to run the SOPSUIM process successfully and the process generates the following files:

- Lis file – Displays the file with process parameter information and version number. It also displays the number of processed, duplicate, error, unmatched and suspended records.
- Log file – Displays in details the information of the record with the row number.

With a successful import of the Registration, Verification and Validation file, the SOPSUIM process stores the data as follows:

Table 1: Data storing in tables with varying file types

File Type	Data stored in table
Registration	SORSURG
Validation	SORSUFE
Verification	SORSURG

Additionally the data is also stored in the SORSUSA table irrespective of the file type. The SORSUSA table is always updated with the latest data. The purpose of SORSUSA table is to store current award eligibility, registration progress and award amount for the students who are eligible for Student Universal Support for Ireland (SUSI) grants.

Parameter Name	Required?	Description	Values
Academic Year	Yes	Enter an valid academic year.	Academic Year Validation

Parameter Name	Required?	Description	Values
			(STVACYR) page
File Name	Yes	Enter the name of the file to be imported without any file extension.	
File Type	Yes	Enter the file type.	<ul style="list-style-type: none"> • RG- Registration file • VA- Fee Validation file • VR- Verification file

SUSI File Export (SOPSUEX)

Updated: August 27, 2020

SOPSUEX process is used to export the Registration, Fee Validation and Verification files back to SUSI.

The administrator must enter valid parameters to run the SOPSUEX process successfully and the process generates the following files:

- Lis file – Displays the file with process parameter information and version number.
- Log file – Displays message when the process is completed successfully or else displays the error message if any.

The process exports/create the file in the user's home directory.

The process exports the file in the format `filename_oneupnumber.xlsx`.

Parameter Name	Required?	Description	Values
File Name	Yes	Enter the name of the file to be	

Parameter Name	Required?	Description	Values
		exported without any file extension.	
File Type	Yes	Enter the file type.	<ul style="list-style-type: none">• RG- Registration file• VA- Fee Validation file• VR- Verification file
Export Fee Amount	Yes	Enter your choice for exporting fee payable amount into the file.	<ul style="list-style-type: none">• Yes• No