



FAQ 1-18P9B7I EDW and Performance Product Load/Refresh Guidelines

June 2013

Table of Contents

BACKGROUND.....	3
DOCUMENTATION	3
HANDBOOKS/USER GUIDES/ADMINISTRATION GUIDES	3
EDW PERFORMANCE MANAGEMENT RESOURCE MATRIX	3
DELIVERED EDW BUSINESS CONCEPTS MATRIX.....	4
PRODUCT AND BUSINESS CONCEPT ACRONYMS.....	4
CONFIGURATION AND SETUP PRIOR TO LOADING DATA	6
CLEANSING PARAMETERS	6
EDW EXTRACT PARAMETERS	6
ADMINISTRATIVE INTERFACE JOB PROCESS MENU.....	6
JOB MENUS.....	6
HELPFUL HINTS	9
PROCESS/SUBPROCESS INFO	9
MATCHING CONTROL REPORT NAMES TO JOB MENU NAMES	10
WHAT OBJECTS ARE LOADED WITH EACH JOB.....	10
CUSTOMIZE JOBS	11
LOAD/REFRESH PROCESSING	12
EDW BASELINE SNAPSHOT STARS/PACKAGES.....	12
EDW BASELINE OPERATIONAL GENERAL, STUDENT AND FINANCIAL AID STARS/PACKAGES	14
EDW BASELINE OPERATIONAL ADVANCEMENT STARS/PACKAGES	16
RAP OPERATIONAL STARS/PACKAGES	18
RAP OPERATIONAL STARS/PACKAGES WITHOUT BRM	24
SRP OPERATIONAL STARS/PACKAGES.....	30
SRP OPERATIONAL STARS/PACKAGES WITHOUT BRM	36
RAP AND SRP TOGETHER	42
RAP AND SRP TOGETHER WITHOUT BRM	47
AAC OPERATIONAL STARS/BUSINESS CONCEPTS	53
EDW BASELINE ADVANCEMENT/AAC OPERATIONAL WITH OTHER EDW BASELINE, RAP OR SRP OPERATIONAL WITH OR WITHOUT BRM.....	54
CONFIGURE/LOAD COGNOS COMPONENTS	55
PARAMETER MAPS	55
BUILD/DEPLOY COGNOS CUBES.....	55
DAILY ADMINISTRATIVE TASKS.....	55

Background

From its inception, the Enterprise Data Warehouse (EDW) was designed to allow for extraction of data at specified points in time (events) to be used for comparative analysis. Although the analytic capabilities of these “snapshot” stars were useful, the need for more detailed-level metrics arose as clients began to use the product.

In an effort to address this need and broaden the dimensional reporting capabilities of the EDW, a number of more granular, “operational” stars were introduced in EDW 8.0 for daily analytics. As with the ODS, these stars are architected to enable incremental refreshing. As the need for increased data coverage has grown, so, too, has the number of operational stars within the EDW.

Considerable new enhancements including many new Operational and Aggregate Stars have been introduced over the past few EDW releases. These contain summary metrics and detail activities and attributes which can be used as part of the baseline EDW and in support of Recruiting and Admissions Performance (RAP), Student Retention Performance (SRP), and Advancement Analytics for Cognos/Advancement Performance (AAC/AP). As the number of tables in the warehouse grows, it becomes increasingly important to understand which are required to be loaded to support desired functionality, and which are not.

This FAQ is designed to provide instructions for loading the breadth of tables necessary to support common combinations of BPRA products. Jobs can be configured based upon your combination and or reporting needs. You can also create new jobs to support your specific combination if one is not delivered out of the box. For more information on how to customize or create job records, see additional references in this document as well as the *Set up Customized Scheduled Processes* section of the *Banner Enterprise Data Warehouse Administration Guide*.

Documentation

Handbooks/User Guides/Administration Guides

With the EDW 8.4.3 and corresponding Performance product releases, the relevant Handbook documents were broken into two documents: a User Guide and an Administration Guide. This FAQ document will reference the User Guide or Administration Guide. If you are on an EDW version prior to EDW 8.4.3 or a Performance Product which corresponds to an EDW release prior to 8.4.3, you should reference the corresponding product's Handbook document instead of the User or Administration Guide.

- Banner Enterprise Data Warehouse Administration Guide: (New with EDW 8.4.3) Describes the warehouse architecture, the Administrative User Interface used to maintain the warehouse, and Cognos reporting tool.
- Banner Enterprise Data Warehouse User Guide: (New with EDW 8.4.3) Describes how to set up the warehouse and includes information about the EDW business concepts.
- Banner EDW Handbook: (Replaced by Enterprise Data Warehouse Administration Guide and Enterprise Data Warehouse User Guide with EDW 8.4.3) Describes the warehouse architecture, the Administrative User Interface used to maintain the warehouse, information about the business concepts, and third party reporting tools.

EDW Performance Management Resource Matrix

The *EDW Performance Management Resource Matrix.xlsx* document associated with this FAQ will provide a matrix of all Reporting Content, Performance Packages, Stars, EDW Extract Parameters, Parameter Maps and Cleansing Rules utilized within the within the EDW Baseline Operational and Performance Product content that can be filtered to quickly identify the areas needed. The goal of this document is to help identify and isolate relationships between these items that can be referenced during implementation, evaluating data loads and supporting documentation.

Delivered EDW Business Concepts Matrix

The Performance Management reporting packages, often called Business Concepts and underlying stars which contain data sourced only from baseline Banner are delivered with the baseline Enterprise Data Warehouse (EDW). The Business Concepts and underlying stars which contain data sourced from Banner Relationship Management (BRM) are delivered with the Banner Recruiting and Admissions Performance (RAP) or Banner Student Retention Performance (SRP) products. Additionally, the Performance Applications (RAP, SRP and AAC) contain significant value-add content such as pre-defined reports, charts, dashboards and scorecards built in IBM Cognos tailored to meet the needs of the associated business area. RAP and SRP reporting content is built off of both baseline EDW Business Concepts as well as the Business Concepts which contain both baseline Banner and BRM data. AAC reporting content is built off of baseline EDW Business Concepts.

The diagram below is intended to provide a high-level view of the EDW Business Concepts and with which products they are delivered or utilized. For a more detailed perspective, see the supporting EDW Performance Management Resource Matrix. To provide further clarity, the Business Concepts that are delivered only with the purchase of an Ellucian Performance Application (RAP, SRP) have been highlighted in red. Additionally, use of the EDW with the Advance product requires purchase of the Advance Connector for EDW.

Product and Business Concept Acronyms

The following acronyms are used in the table and throughout this document to represent BPRA products and business concepts.

Performance Reporting Products

- AAC Advancement Analytics for Cognos
- RAP Banner Recruiting and Admissions Performance
- SRP Banner Student Retention Performance

Business concepts

- ACG Analyze Constituent Giving
- AFP Analyze Fundraising Progress
- MPP Manage Prospect Pipeline
- RQPP Research and Qualify Potential Prospects
- MA Manage Applicants
- IANE Impact of Aid on New Enrollment
- AEF* Analyze Enrollment Funnel
- ASP Analyze Student Progress
- ASE* Analyze Student Engagement

** Indicates a business concept delivered only with the performance product*

	Package Name	Baseline EDW	AAC	RAP	SRP
Snapshot Star Packages	EDW Academic Program Course	X			
	EDW Advancement Gift	X			
	EDW Course Registration	X			
	EDW Employee	X			
	EDW Employee Degree	X			
	EDW Employee Position	X			
	EDW Employment Application	X			
	EDW Enrollment	X			
	EDW Financial Aid Pre Student	X			
	EDW Financial Aid Student	X			
	EDW General Ledger	X			
	EDW Graduation Completion	X			
	EDW Grant And Project	X			
	EDW Operating Ledger	X			
	EDW Receivable Customer	X			
	EDW Receivable Revenue	X			
	EDW Recruiting And Admission	X			
Operational Star Packages and corresponding Snapshot versions	Advancement Packages				
	PM Analyze Constituent Giving	X	X		
	PM Analyze Fundraising Progress	X	X		
	Snapshot - PM Analyze Fundraising Progress	X	X		
	PM Manage Prospect Pipeline	X	X		
	Snapshot - PM Manage Prospect Pipeline	X	X		
	PM Research And Qualify Potential Prospects	X	X		
	Recruiting and Admissions Packages				
	PM Manage Applicants	X		X	
	Snapshot - PM Manage Applicant	X		X	
	PM Impact Of Aid On New Enrollment	X		X	
	Snapshot - PM Impact Of Aid On New Enrollment	X		X	
	PM Analyze Enrollment Funnel			X	
	Snapshot - PM Analyze Enrollment Funnel			X	
	Student Retention Packages				
	PM Analyze Student Progress	X			X
	Snapshot - PM Analyze Student Progress	X			X
	PM Analyze Student Engagement				X
	Snapshot - PM Analyze Student Engagement				X

Configuration and Setup Prior to Loading Data

Cleansing Parameters

Cleansing parameters should be configured prior to loading data. A full list of parameters can be found within the *Set Up Cleansing Processes* section of the *Enterprise Data Warehouse User Guide* as well as within the *EDW Performance Management Resource Matrix*. However, of particular importance are the following high-level default parameters which should be set prior to your first load of the EDW:

Parameter Name	Description
BAD_CLEANSE_VALUE	Code used to replace a code with no valid translation during cleansing.
BAD_CLEANSE_SHORT	Short description given for a code with no valid translation during cleansing.
BAD_CLEANSE_LONG	Long description given for a code with no valid translation during cleansing.
MULTI_SOURCE_CLEANSE_VALUE	Value used for the MIF_VALUE if none exists for the data source during ETL processing.
MULTI_SOURCE_CLEANSE_SHORT	Short description used for the MIF_VALUE if none exists for the data source during ETL processing.
MULTI_SOURCE_CLEANSE_LONG	Long description used for the MIF_VALUE if none exists for the data source during ETL processing.
NULL_CLEANSE_VALUE	Code used to replace NULL values during ETL processing.
NULL_CLEANSE_SHORT	Short description used to replace NULL values during ETL processing.
NULL_CLEANSE_LONG	Long description used to replace NULL values during ETL processing.
ZERO_CLEANSE_VALUE	Code used to populate value fields for “zero” records in dimension tables.
ZERO_CLEANSE_SHORT	Short description used to populate short description fields for “zero” records in dimension tables.
ZERO_CLEANSE_LONG	Long description used to populate long description fields for “zero” records in dimension tables.

EDW Extract Parameters

Prior to running load jobs it is important to understand the behavior of your data and expected outcomes. A subset of the ETL processes that load data within the EDW require specific parameters to be defined to appropriately load data specific to your institution’s needs. EDW extract parameters that support the various business concepts and specific snapshot stars are listed in the *EDW Performance Management Resource Matrix*.

For more detailed information and a full list of associated parameter configuration reference the *Set Up Data* section of the *Enterprise Data Warehouse User Guide*.

Administrative Interface Job Process Menu

Job Menus

There are many job options to load or refresh components of your warehouse delivered out of the box. The jobs can be used as is or modified to suite your needs. All are controlled by parameter records stored within the IA_ADMIN MTVPARM table. Depending on which BPRA products are installed, you will have different job menu options. For more information on how to customize or create job records, see

additional references in this document as well as the *Set up Customized Scheduled Processes* section of the *Banner Enterprise Data Warehouse Administration Guide*.

If all BPRA Banner sourced products are installed, your Options-> Schedule a Process menu would look like this as of the EDW 8.4.3 and associated releases:

Your Institution Name!

Preferences & Security Options Meta Data Staging **New Web Tailor Administration**

Search

Select a Process

Select a process to schedule.

Schedule Banner ODS Mappings

Banner ODS Utilities

Schedule Banner EDW Snapshot Mappings

Schedule Banner EDW Operational Mappings

Banner EDW Utilities

Schedule Banner EDW Complete Load/Refresh

Schedule Banner EDW Dimensional Components

Schedule Banner EDW Facts

Schedule Banner EDW Groups and Aggregates

Schedule Banner EDW Freeze Aggregates

Schedule Enrollment Management Mappings

Freeze Multiple Banner ODS Tables/Views

Freeze a Single Banner ODS Table/View

Publish Meta Data Reports

Baseline Banner ODS Jobs and Utilities

Baseline Banner EDW Snapshot and Operational Jobs and Utilities

Baseline Banner Advancement EDW - Optional Install Component

RAP or SRP Jobs

Baseline Banner ODS Freeze Jobs

ALL Products' Publish Meta Data Job

If you have an EDW 'A' targeted install for Advance sourced objects to support AAC, your Options-> Schedule a Process menu would look like this:

Your Institution Name!

Preferences & Security

Options

Meta Data

Staging

New Web Tailor Administration

Search

Select a Process

Select a process to schedule.

Advance EDW Utilities

Schedule Advance EDW Complete Load/Refresh

Schedule Advance EDW Dimensional Components

Schedule Advance EDW Facts

Schedule Advance EDW Groups and Aggregates

Schedule Advance EDW Freeze Aggregates

Publish Meta Data Reports

Run A Single Advance EDW Mapping

Helpful Hints

Process/Subprocess Info

The Show Process/Subprocess Info link in the upper right hand corner of any job menu will expand the job menu to include a description of each job.

Select a Subprocess

Select a subprocess to schedule.

[Select a Different Process]

[Show Subprocess Info]

Schedule Enrollment Management Mappings

[Load All Banner Performance Reporting & Analytics Warehouse Components](#)

[Refresh All Banner Performance Reporting & Analytics Warehouse Components](#)

[Load All Recruiting and Admissions Performance Warehouse Components](#)

[Refresh All Recruiting and Admissions Performance Warehouse Components](#)

[Load All Student Retention Performance Warehouse Components](#)

[Refresh All Student Retention Performance Warehouse Components](#)

[Load Relationship Management ODS Components](#)

[Refresh Relationship Management ODS Components](#)

[Load/Refresh Relationship Management EDW Components](#)

[Load/Refresh EM Campaign EDW Star](#)

[Load/Refresh EM Communication EDW Star](#)

[Load/Refresh EM Funnel History EDW Star](#)

Select a Subprocess

Select a subprocess to schedule.

[Select a Different Process]

[Hide Subprocess Info]

Schedule Enrollment Management Mappings

[Load All Banner Performance Reporting & Analytics Warehouse Components \[Details\]](#)

Use this process to run the mappings to load all Banner Product and Banner Relationship Management data used in Recruiting and Admissions and Student Retention Performance from Banner into ODS and then into the EDW (including cleansing rules) by either all academic periods and or all aid years or for a single academic period and or aid year as appropriate to the data being loaded. All data will be loaded from Banner Accounts Receivable, Advancement, Finance, Financial Aid, General, Human Resources and Student and Banner Relationship Management tables into ODS tables; Cleansing rules are loaded; data from ODS General, Student, Accounts Receivable, Financial Aid, and Enrollment Management tables is loaded into EDW operational fact tables.

[Refresh All Banner Performance Reporting & Analytics Warehouse Components \[Details\]](#)

Use this process to run the mappings to refresh all data changed in any of the Banner Products and Banner Relationship Management data (including data used in Recruiting and Admissions and Student Retention Performance) from Banner into ODS and then into the EDW (including cleansing rules) by either all academic periods and or all aid years or for a single academic period and or aid year as appropriate to the data being refreshed. All data will be refreshed from Banner Accounts Receivable, Advancement, Finance, Financial Aid, General, Human Resources and Student and Banner Relationship Management tables into ODS tables; Cleansing rules are loaded; data from ODS General, Student, Accounts Receivable, Financial Aid, and Enrollment Management tables is loaded into EDW operational fact tables.

[Load All Recruiting and Admissions Performance Warehouse Components \[Details\]](#)

Use this process to run the mappings to load Banner Product and Banner Relationship Management (included for Recruiting and Admissions Performance) data into the ODS and then into the EDW (including cleansing rules) by either all academic periods and or all aid years or for a single academic period and or aid year as appropriate to the data being loaded. All data will be loaded from Banner Accounts Receivable, Financial Aid, General, Student and Banner Relationship Management tables into ODS tables; Cleansing rules are loaded; data from ODS General, Student, Accounts Receivable, Financial Aid, and Enrollment Management tables is loaded into EDW operational fact tables.

[Refresh All Recruiting and Admissions Performance Warehouse Components \[Details\]](#)

Use this process to run the mappings to refresh all changes to Banner Product and Banner Relationship Management (included for Recruiting and Admissions Performance) data into the ODS and then into the EDW (including cleansing rules) by either all academic periods and or all aid years

Matching Control Report names to Job Menu names

To match the names you do see in the control report to the job menu descriptive name, go to the parameter page and filter by SUBPROCESS. The Internal Code 1 field will be MAPGROUP – <PRODUCT> (i.e. ODS, EDW, EM). The External Code will be the name you see in the control report. The Description will be the name you see in the job menu.

Select a Parameter

Click a Description in the table below to select the Parameter you want to update or delete, or change the search criteria and click Search.

SUBPROCESS
MAPGROUP-EM
-Show All Internal Codes 2-
Search
Export

[Cascade >](#)
[< Cascade](#)
[< Cascade](#)

Internal Group	Internal Code 1	Internal Code 2	Internal Code Sequence	External Code	Description
SUBPROCESS	MAPGROUP-EM		1	LOAD_ALL_ODS_EDW_EM	Load All Banner Performance Reporting & Analytics Warehouse Components
SUBPROCESS	MAPGROUP-EM		2	REFRESH_ALL_ODS_EDW_EM	Refresh All Banner Performance Reporting & Analytics Warehouse Components
SUBPROCESS	MAPGROUP-EM		3	LOAD_ALL_EM_RAP	Load All Recruiting and Admissions Performance Warehouse Components
SUBPROCESS	MAPGROUP-EM		4	REFRESH_ALL_EM_RAP	Refresh All Recruiting and Admissions Performance Warehouse Components
SUBPROCESS	MAPGROUP-EM		5	LOAD_ALL_EM_SRP	Load All Student Retention Performance Warehouse Components
SUBPROCESS	MAPGROUP-EM		6	REFRESH_ALL_EM_SRP	Refresh All Student Retention Performance Warehouse Components

What Objects are Loaded with Each Job

For the specifics of what warehouse objects are loaded/refreshed as part of each job, take the name from the control report or from the MAPGROUP External Code and in the parameter page, filter instead by 'ETL CONTROL GROUP' then the second column, Internal Code 1, is the name for the job. Internal Code 2 contains all the pieces of that job and the Description is the description for each piece. These may be layered, meaning one job may call another job which is a group of jobs, so this process may need to be repeated until the desired granularity is obtained.

Select a Parameter

Click a Description in the table below to select the Parameter you want to update or delete, or change the search criteria and click Search.

ETL CONTROL GROUP
LOAD_ALL_EM_RAP
-Show All Internal Codes 2-
Search
Export

[Cascade >](#)
[< Cascade](#)
[< Cascade](#)

Internal Group	Internal Code 1	Internal Code 2	Internal Code Sequence	External Code	Description
ETL CONTROL GROUP	LOAD_ALL_EM_RAP	LOAD_GENERAL [Maps]	1	Y	General Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_RAP	LOAD_STUDENT [Maps]	2	Y	Student Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_RAP	LOAD_AR [Maps]	3	Y	AR Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_RAP	LOAD_FINAID [Maps]	4	Y	Student Load ETL Control Record

Customize Jobs

When viewing sets of ETL CONTROL GROUP records, you'll notice that the *External Code* column is defined as 'Y' for each. This column is acting as a flag for inclusion/exclusion of each in the job stream to be executed when this *ETL CONTROL GROUP* is submitted. Therefore, if you wish to pare a job stream down to fewer components, use the Administrative Interface to change the External Code column to 'N' for each component you do not wish to be executed when the *ETL CONTROL GROUP* is submitted.

Select a Parameter

Click a Description in the table below to select the Parameter you want to update or delete, or change the search criteria and click Search.

ETL CONTROL GROUP

LOAD_ALL_EM_RAP

-Show All Internal Codes 2-

Search

Export

Cascade >

< Cascade

< Cascade

Internal Group	Internal Code 1	Internal Code 2	Internal Code Sequence	External Code	Description
ETL CONTROL GROUP	LOAD_ALL_EM_RAP	LOAD_GENERAL [Maps]		Y	General Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_RAP	LOAD_STUDENT [Maps]		Y	Student Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_RAP	LOAD_AR [Maps]		Y	AR Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_RAP	LOAD_FINAID [Maps]		Y	Student Load ETL Control Record

You may also add additional job entries for items which do not exist.

Additionally, you may use the *Export* functionality to pull source record definitions to potentially create custom job streams, if desired. For full details on creating the necessary parameters in support of a custom process, refer to the *Set up Customized Scheduled Processes* section of the *Enterprise Data Warehouse Administration Guide*.

Select a Parameter

Click a Description in the table below to select the Parameter you want to update or delete, or change the search criteria and click Search.

ETL CONTROL GROUP

LOAD_ALL_EM_SRP

-Show All Internal Codes 2-

Search

Export

Cascade >

< Cascade

< Cascade

Internal Group	Internal Code 1	Internal Code 2	Internal Code Sequence	External Code	Description
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_AR	2	Y	AR Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_FINAID	3	Y	FinAid Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_GENERAL	5	Y	General Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_STUDENT	7	Y	Student Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_VALIDATION	9	Y	MGT_VALIDATION Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_RELATIONSHIP_MANAGEMENT	10	Y	Relationship Management Load ETL Control Record
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_DEFAULT_CLEANSING	10	Y	Load all default cleansing values
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_DIM_WAREHOUSE_ENTITY	10	Y	Load any new entities
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_EDW_INTEREST	20	Y	Load/Refresh Interest Star
ETL CONTROL GROUP	LOAD_ALL_EM_SRP	LOAD_EDW_MEETING_TIME	21	Y	Load/Refresh Course Meeting Time Star

Load/Refresh Processing

EDW Baseline Snapshot Stars/Packages

Summary of Data Required

- ODS
- Snapshot Academic Program Course Star as desired
- Snapshot Advancement Giving Star as desired
- Snapshot Course Registration Star as desired
- Snapshot Employee Star as desired
- Snapshot Employee Degree Star as desired
- Snapshot Employee Position Star as desired
- Snapshot Employment Application Star as desired
- Snapshot Enrollment Star as desired
- Snapshot Financial Aid Pre Student Star as desired
- Snapshot Financial Aid Student Star as desired
- Snapshot General Ledger Star as desired
- Snapshot Graduation Completion Star as desired
- Snapshot Grant and Project Star as desired
- Snapshot Operating Ledger Star as desired
- Snapshot Receivable Customer Star as desired
- Snapshot Receivable Revenue Star as desired
- Snapshot Recruiting and Admissions Star as desired

Pre Load Steps

1. Load the Operational Data Store (ODS)

- Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*
- Review the control report for the ODS load. Verify that the ODS loads all completed successfully.

2. Load the Enterprise Data Warehouse (EDW) components that need to be loaded prior to the EDW Snapshot mappings

a) Load the EDW Cleansing Values

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

b) Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

c) Load the Warehouse Entity Dimension (Process Indicator = 'L')

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Warehouse Entity Dimension*

d) Load the Indicator Dimension

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Indicator Dimension*

e) Load the Institution Star (Process Indicator = 'L')

Ensure appropriate site-specific extract parameters have been defined

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Update *EDW EXTRACT PARAMETERS* for *INSTITUTION_CHARACTERISTIC*, *INST_GEOGRAPHIC_DIVISION*, and *NULL_NATION*

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Institution Star*

f) Review the control reports for the aforementioned jobs to ensure they've all run successfully

Load Data

- **Verify that parameters have been set up for the various EDW Snapshot Stars that are being loaded**

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Update appropriate *EDW EXTRACT PARAMETERS* for stars requiring them.

- **All Snapshot Stars:**
MULTI_SOURCE_GROUP
- **WFT_RECRUITING_AND_ADMISSIONS Star:**
STUDENT_LEVEL_GROUP
STUDENT_LEVEL_GROUP_TESTS
TEST
- **WFT_EMPLOYEE_POSITION Star:**
EARNINGS
- **WFT_EMPLOYMENT_APPLICATION Star:**
HR_APPL_STAT

- **Load the particular EDW Snapshot Stars**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Snapshot Mappings*

- **Review the control reports for the EDW Snapshot Star loads to ensure they completed successfully**

EDW Baseline Operational General, Student and Financial Aid Stars/Packages

Summary of Data Required

- ODS General, Student, AR, Financial Aid, Validation
- EDW General, Student and Financial Aid Operational Stars
- Admissions Financial Aid Record Aggregate
- Student Progress Aggregate
- Freeze Manage Applicant Concept Data as desired
- Freeze Impact of Aid on New Enrollment Concept Data as desired
- Freeze Student Progress Concept Data as desired

Pre Load Steps

1. Load the Operational Data Store (ODS)

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

Review the control report for the ODS load. Verify that the ODS loads all completed successfully.

2. Some information populated within the ODS/EDW is based upon a person's preferred address information. This information is rule-based. Therefore, the ADDRESS_TYPE value that will be used to drive extraction logic within the ODS needs to be defined within the Banner GTVSDAX form. Only one address type can be defined for the preferred address.
3. Verify that staging processes are valid (via the Staging Area Status report).
4. Once the ODS is loaded, run these items one-time before the initial EDW load process to populate required data. Some of these components will be run with each refresh of the EDW, as well, but it is helpful to run them in advance of running all EDW components to streamline processing.

- **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

- **Load the Warehouse Entity Dimension (Process Indicator = 'L')**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Warehouse Entity Dimension*

- **Load the Indicator Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Indicator Dimension*

- **Load the Calendar Date Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Calendar Date Dimension*

5. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*).

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

Load a Star or group of Stars from the Operational Menu (Process Indicator = '(L)oad')

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings*

Note: If you wish to only load data to support Recruiting and Admissions (IANE or MA) or Student Retention (ASP) based Business Concepts, modify the Load/Refresh All Banner EDW Operational Stars and/or the Load/Refresh all Banner Student jobs to only load/refresh the student stars which pertain to these concepts. For a list of which stars to add/remove from the jobs, see the details in either the RAP or SRP Operational Stars/Packages without BRM sections of this document.

Review the control reports for the aforementioned jobs to ensure they've all run successfully

Refresh Data

Refresh a Star or group of Stars from the Operational Menu (Process Indicator = '(R)efresh')

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings*

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure ODS and then EDW Operational Stars/Aggregates are up-to-date via load or refresh
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Operational:*
 - *Freeze Manage Applicant Concept Data*
 - *Freeze Impact of Aid on New Enrollment Concept Data*
 - *Freeze Student Progress Concept Data*

EDW Baseline Operational Advancement Stars/Packages

Summary of Data Required

- EDW Advancement Operational Stars
- Manage Prospect Pipeline Aggregates
- Analyze Fundraising Aggregate
- Research and Qualified Potential Prospect Aggregates (Entity and Institution)
- Research and Qualified Potential Prospect Aggregates (Designation College), optional
- Research and Qualified Potential Prospect Aggregates (Designation Department), optional
- Freeze Analyze Fundraising Aggregate as desired
- Freeze Manage Prospect Pipeline Aggregate as desired
- Freeze Manage Prospect Pipeline A Aggregate as desired
- Freeze Manage Prospect Pipeline B Aggregate as desired

Architecture notes

- Though this is baseline EDW content, it is optionally installed/upgraded during the EDW install/upgrade process
- This content supports AAC/AP reporting
- This content is loaded using a different ETL methodology than the baseline EDW General, Student and Financial Aid content. The Advancement EDW content loads all dimensions and then loads all facts and aggregates. The General, Student and Financial Aid stars are loaded star by star.
- There currently is not refresh option for this content, it is always reloaded. One exception is the RQPP content which can be reloaded for the current year or a specific year only (as opposed to all years).
- There is no ODS source for these EDW stars, Advancement stars are loaded directly from staged source tables.

Pre Load Steps

1. Verify that staging processes are valid (via the Staging Area Status report).
2. Run load processes to populate required cleansing data.
 - **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

3. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*.)

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

Run applicable load process for Advancement data mappings

If a Banner Advancement site

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Complete Load/Refresh*

If an Advance site

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Advance EDW Complete Load/Refresh*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Data

There is no refresh option at this time for EDW Operational Advancement content. One exception is the RQPP content which can be reloaded for the current year or a specific year only (as opposed to all years).

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure EDW Operational Stars/Aggregates are up-to-date
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Freeze Aggregates*:
 - *Freeze Analyze Fundraising Aggregate*
 - *Freeze Manage Prospect Pipeline Aggregate*
 - *Freeze Manage Prospect Pipeline A Aggregate*
 - *Freeze Manage Prospect Pipeline B Aggregate*

RAP Operational Stars/Packages

The Banner Recruiting and Admissions Performance (RAP) product focuses on three performance reporting packages and their snapshot counterparts: PM Manage Applicants (MA), PM Impact of Aid on New Enrollment (IANE) and PM Analyze Enrollment Funnel (AEF). To utilize these concepts, ODS and EDW content based upon Banner Student, General, AR and Financial Aid data as well as the additional Banner Relationship Management (BRM) data. Depending on how you implement the warehouse components to support RAP (all at once or in stages) as well as what additional BPRA products you may use, there are various options

Summary of Data Required

- ODS General, Student, AR, Financial Aid, Validation
- ODS Relationship Management (sourced by BRM)
- EDW General, Student* and Financial Aid Operational Stars
- EDW Relationship Management Operational Stars (sourced by BRM)
- Admissions Financial Aid Record Aggregate
- Freeze Manage Applicant Concept Data as desired
- Freeze Impact of Aid on New Enrollment Concept Data as desired
- Freeze Analyze Enrollment Funnel Concept Data as desired

*Not all EDW Student Operational Stars are needed to support RAP, for the specific list, see details below.

Pre Load Steps

1. Some information populated within the ODS/EDW is based upon a person's preferred address information. This information is rule-based. Therefore, the ADDRESS_TYPE value that will be used to drive extraction logic within the ODS needs to be defined within the Banner GTVSDAX form. Only one address type can be defined for the preferred address.
2. Verify that staging processes are valid (via the Staging Area Status report).
3. Once the ODS is loaded, run these items one-time before the initial EDW load process to populate required data. Some of these components will be run with each refresh of the EDW, as well, but it is helpful to run them in advance of running all EDW components to streamline processing.

- **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

- **Load the Warehouse Entity Dimension (Process Indicator = 'L')**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Warehouse Entity Dimension*

- **Load the Indicator Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Indicator Dimension*

- **Load the Calendar Date Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Calendar Date Dimension*

4. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*).

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

If you want to **Load All ODS and EDW components necessary to support RAP at once**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Load All Recruiting and Admissions Performance Warehouse Components*

Note: this will only load the ODS composite tables and EDW stars/aggregates which are needed to support RAP. Meaning it will not load ODS Finance, HR etc., nor all EDW Student stars, only the ones needed to support RAP.

Review the control report for your applicable job to ensure all the components have run successfully

If you have already loaded portions of your warehouse and/or you prefer to load your warehouse in stages, here are additional options

Load ODS Components Necessary to Support RAP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

If you have a restricted ODS license limited to objects which support RAP:

Option 1 – Load ODS Via Modified Load All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP:

- *LOAD_AR*
- *LOAD_FINAID*
- *LOAD_GENERAL*
- *LOAD_STUDENT*
- *REFRESH_VALIDATION*
- *LOAD_RELATIONSHIP_MANAGEMENT*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

Option 2 – Load ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Load Accounts Receivable*
- *Load Financial Aid*
- *Load General*
- *Load Student*
- *Refresh Validation Tables*
- *Load Relationship Management*

Load EDW Components Necessary to Support RAP (assumes ODS is loaded)

If you have an enterprise wide EDW license:

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

If you have a restricted EDW license limited to objects which support RAP:

Option 1 – Load EDW Via Modified Load All EDW Operational Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner EDW Operational Stars Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1:
LOAD_EDW_ALL_OPERATIONAL

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP:

- *LOAD_DEFAULT_CLEANSING*
- *LOAD_EDW_DIM_WAREHOUSE_ENTITY*
- *LOAD_EDW_DIM_CALENDAR_DATE*
- *LOAD_EDW_DIM_INDICATOR*
- *LOAD_EDW_EVENT*
- *LOAD_EDW_ADMINISTRATOR*
- *LOAD_EDW_ADMISSIONS_APPLICATION*
- *LOAD_EDW_ADMISSIONS_RECRUITMENT*
- *LOAD_EDW_APPLICATION_ATTRIBUTE*
- *LOAD_EDW_APPLICATION_COHORT*
- *LOAD_EDW_APPLICATION_DECISION*
- *LOAD_EDW_APPLICATION_RATING*
- *LOAD_EDW_APPLICATION_REQUIREMENT*
- *LOAD_EDW_BANNER_COMMUNICATION*
- *LOAD_EDW_RACE*
- *LOAD_EDW_CONTACT*
- *LOAD_EDW_INTEREST*
- *LOAD_EDW_POST_SECONDARY*

- LOAD_EDW_PROSPECTIVE_STUDENT
- LOAD_EDW_RECRUITMENT_ATTRIBUTE
- LOAD_EDW_RECRUITMENT_COHORT
- LOAD_EDW_SEC_SCHL_SUBJECT
- LOAD_EDW_TEST
- LOAD_EDW_HOLD
- LOAD_EDW_INSTITUTION
- LOAD_EM_COMMUNICATION
- LOAD_EM_CAMPAIGN
- LOAD_EM_FUNNEL_HISTORY
- EM_RECRUITER_ASSIGN_REFRESH
- EM_COMBINED_REFRESH
- LOAD_EM_INTERACTION
- LOAD_EM_PROB_DESIRE_INSTANCE
- LOAD_EM_PROB_DESIRE_MODEL
- LOAD_EDW_FINAID_APPLICATION
- LOAD_EDW_FINAID_AWD_ACADPD
- LOAD_EDW_FINAID_AWD_AIDYR
- LOAD_EDW_GROUPS
- LOAD_EDW_ADMS_FINAID_AGG

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Load EDW in Stages

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner EDW Student Operational Stars Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_EDW_STUDENT*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP:

- LOAD_DEFAULT_CLEANSING
- LOAD_EDW_DIM_WAREHOUSE_ENTITY
- LOAD_EDW_ADMINISTRATOR
- LOAD_EDW_ADMISSIONS_APPLICATION
- LOAD_EDW_ADMISSIONS_RECRUITMENT
- LOAD_EDW_APPLICATION_ATTRIBUTE
- LOAD_EDW_APPLICATION_COHORT
- LOAD_EDW_APPLICATION_DECISION
- LOAD_EDW_APPLICATION_RATING
- LOAD_EDW_APPLICATION_REQUIREMENT
- LOAD_EDW_BANNER_COMMUNICATION
- LOAD_EDW_CONTACT
- LOAD_EDW_INTEREST
- LOAD_EDW_POST_SECONDARY

- *LOAD_EDW_PROSPECTIVE_STUDENT*
- *LOAD_EDW_RECRUITMENT_ATTRIBUTE*
- *LOAD_EDW_RECRUITMENT_COHORT*
- *LOAD_EDW_SEC_SCHL_SUBJECT*
- *LOAD_EDW_TEST*
- *LOAD_EDW_GROUPS*

Via the BPRA Administrative Interface, run the following jobs as Loads in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings:*

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh All Banner EDW Relationship Management*
- *Load/Refresh Admissions Financial Aid Record Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Data

If you want to Refresh All ODS and EDW components necessary to support RAP at once

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Refresh All Recruiting and Admissions Performance Warehouse Components*

Review the control report for the applicable job to ensure all the components have run successfully

If you have already refreshed portions of your warehouse and/or you prefer to refresh your warehouse in stages, here are additional options

Refresh ODS Components Necessary to Support RAP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

If you have a restricted ODS license limited to objects which support RAP:

Option 1 – Refresh ODS Via Modified Refresh All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Refresh All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *REFRESH_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP:

- *REFRESH_AR*
- *REFRESH_FINAID*
- *REFRESH_GENERAL*
- *REFRESH_STUDENT*
- *REFRESH_VALIDATION*
- *REFRESH_RELATIONSHIP_MANAGEMENT*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Refresh Accounts Receivable*
- *Refresh Financial Aid*
- *Refresh General*
- *Refresh Student*
- *Refresh Validation Tables*
- *Refresh Relationship Management*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Only EDW Components Necessary to RAP (assumes ODS is refreshed)

If you have an enterprise wide EDW or a restricted license:

Note: The same job is used to both Load or Refresh All EDW Operational Stars and Load or Refresh All EDW Student Operational Stars, thus if you modified the jobs to only load the stars needed to support RAP (as opposed to all stars), just those stars will be refreshed as well.

Option 1 – Refresh EDW Via Modified Load/Refresh All EDW Operational Job

Via the BPRA Administrative Interface, run the following job as a Refresh: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh EDW in Stages

Via the BPRA Administrative Interface, run the following jobs as a Refresh in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational*:

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh All Banner EDW Relationship Management*
- *Load/Refresh Admissions Financial Aid Record Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure ODS and then EDW Operational Stars/Aggregates are up-to-date
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Operational or Schedule Enrollment Management Mappings*:

- *Freeze Manage Applicant Concept Data*
- *Freeze Impact of Aid on New Enrollment Concept Data*
- *Freeze Analyze Enrollment Funnel Concept Data*

RAP Operational Stars/Packages without BRM

While the full functionality of Banner Recruiting and Admissions Performance (RAP) requires licensing Banner Recruiting Management (BRM) and installing this add-on product in the Banner source database, it is not a requirement.

If you do not license BRM, you will not install any additional BRM sourced warehouse components during the RAP install, you will only install Cognos content. After you complete the import of Cognos content, you will be able to use reports and analytics that are based on the PM Impact of Aid on New Enrollment (IANE) or PM Manage Applicants (MA) packages. However, you will not be able to use the content and analytics based on the PM Analyze Enrollment Funnel (AEF) package because it incorporates BRM-based data.

Since the additional warehouse installation/upgrade piece is not executed, no additional Enrollment Management or RAP specific Administrative Interface jobs will be created, only baseline EDW jobs will exist. Thus to load/refresh data to support RAP you may either load/refresh using the baseline ODS/EDW components independently or recreate the overall RAP jobs mentioned in other sections of this document. In order to create Enrollment Management menu option and the RAP overall load and refresh jobs, run the `mtvparm_jobs_data_brm.sql` and `mtvparm_jobs_data_rap.sql` scripts attached to this FAQ in your environment connected as `IA_ADMIN`. This will enter additional MTVPARM records to generate those jobs.

Summary of Data Required

- ODS General, Student, AR, Financial Aid, Validation
- EDW General, Student* and Financial Aid Operational Stars
- Admissions Financial Aid Record Aggregate
- Freeze Manage Applicant Concept Data as desired
- Freeze Impact of Aid on New Enrollment Concept Data as desired

*Not all EDW Student Operational Stars are needed to support RAP, for the specific list, see details below.

Pre Load Steps

1. Some information populated within the ODS/EDW is based upon a person's preferred address information. This information is rule-based. Therefore, the `ADDRESS_TYPE` value that will be used to drive extraction logic within the ODS needs to be defined within the Banner GTVSDAX form. Only one address type can be defined for the preferred address.
2. Verify that staging processes are valid (via the Staging Area Status report).
3. Once the ODS is loaded, run these items one-time before the initial EDW load process to populate required data. Some of these components will be run with each refresh of the EDW, as well, but it is helpful to run them in advance of running all EDW components to streamline processing.
 - **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

- **Load the Warehouse Entity Dimension (Process Indicator = 'L')**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Warehouse Entity Dimension*

- **Load the Indicator Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Indicator Dimension*

- **Load the Calendar Date Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Calendar Date Dimension*

4. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*).

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

If you ran the additional scripts attached to this FAQ and want to Load All ODS and EDW components necessary to support RAP at once

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Load All Recruiting and Admissions Performance Warehouse Components*

Note: this will only load the ODS composite tables and EDW stars/aggregates which are needed to support RAP. Meaning it will not load ODS Finance, HR etc., nor all EDW Student stars, only the ones needed to support RAP.

Review the control report for your applicable job to ensure all the components have run successfully

If you have already loaded portions of your warehouse and/or you prefer to load your warehouse in stages, here are additional options

Load ODS Components Necessary to Support RAP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

If you have a restricted ODS license limited to objects which support RAP:

Option 1 – Load ODS Via Modified Load All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP:

- *LOAD_AR*
- *LOAD_FINAID*
- *LOAD_GENERAL*
- *LOAD_STUDENT*
- *REFRESH_VALIDATION*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

Option 2 – Load ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Load Accounts Receivable*
- *Load Financial Aid*
- *Load General*
- *Load Student*
- *Refresh Validation Tables*

Load EDW Components Necessary to Support RAP (assumes ODS is loaded)

If you have an enterprise wide EDW license:

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

If you have a restricted EDW license limited to objects which support RAP:

Option 1 – Load EDW Via Modified Load All EDW Operational Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner EDW Operational Stars Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_EDW_ALL_OPERATIONAL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP:

- *LOAD_DEFAULT_CLEANSING*
- *LOAD_EDW_DIM_WAREHOUSE_ENTITY*
- *LOAD_EDW_DIM_CALENDAR_DATE*

- LOAD_EDW_DIM_INDICATOR
- LOAD_EDW_EVENT
- LOAD_EDW_ADMINISTRATOR
- LOAD_EDW_ADMISSIONS_APPLICATION
- LOAD_EDW_ADMISSIONS_RECRUITMENT
- LOAD_EDW_APPLICATION_ATTRIBUTE
- LOAD_EDW_APPLICATION_COHORT
- LOAD_EDW_APPLICATION_DECISION
- LOAD_EDW_APPLICATION_RATING
- LOAD_EDW_APPLICATION_REQUIREMENT
- LOAD_EDW_BANNER_COMMUNICATION
- LOAD_EDW_RACE
- LOAD_EDW_CONTACT
- LOAD_EDW_INTEREST
- LOAD_EDW_POST_SECONDARY
- LOAD_EDW_PROSPECTIVE_STUDENT
- LOAD_EDW_RECRUITMENT_ATTRIBUTE
- LOAD_EDW_RECRUITMENT_COHORT
- LOAD_EDW_SEC_SCHL_SUBJECT
- LOAD_EDW_TEST
- LOAD_EDW_HOLD
- LOAD_EDW_INSTITUTION
- LOAD_EDW_FINAID_APPLICATION
- LOAD_EDW_FINAID_AWD_ACADPD
- LOAD_EDW_FINAID_AWD_AIDYR
- LOAD_EDW_GROUPS
- LOAD_EDW_ADMS_FINAID_AGG

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Load EDW in Stages

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner EDW Student Operational Stars Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_EDW_STUDENT*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP:

- LOAD_DEFAULT_CLEANSING
- LOAD_EDW_DIM_WAREHOUSE_ENTITY
- LOAD_EDW_ADMINISTRATOR
- LOAD_EDW_ADMISSIONS_APPLICATION
- LOAD_EDW_ADMISSIONS_RECRUITMENT
- LOAD_EDW_APPLICATION_ATTRIBUTE
- LOAD_EDW_APPLICATION_COHORT

- *LOAD_EDW_APPLICATION_DECISION*
- *LOAD_EDW_APPLICATION_RATING*
- *LOAD_EDW_APPLICATION_REQUIREMENT*
- *LOAD_EDW_BANNER_COMMUNICATION*
- *LOAD_EDW_CONTACT*
- *LOAD_EDW_INTEREST*
- *LOAD_EDW_POST_SECONDARY*
- *LOAD_EDW_PROSPECTIVE_STUDENT*
- *LOAD_EDW_RECRUITMENT_ATTRIBUTE*
- *LOAD_EDW_RECRUITMENT_COHORT*
- *LOAD_EDW_SEC_SCHL_SUBJECT*
- *LOAD_EDW_TEST*
- *LOAD_EDW_GROUPS*

Via the BPRA Administrative Interface, run the following jobs as Loads in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings:*

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh Admissions Financial Aid Record Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Data

If you ran the additional scripts attached to this FAQ and want to Refresh All ODS and EDW components necessary to support RAP at once

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Refresh All Recruiting and Admissions Performance Warehouse Components*

Review the control report for the applicable job to ensure all the components have run successfully

If you have already refreshed portions of your warehouse and/or you prefer to refresh your warehouse in stages, here are additional options

Refresh ODS Components Necessary to Support RAP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

If you have a restricted ODS license limited to objects which support RAP:

Option 1 – Refresh ODS Via Modified Refresh All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Refresh All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *REFRESH_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP:

- *REFRESH_AR*
- *REFRESH_FINAID*
- *REFRESH_GENERAL*
- *REFRESH_STUDENT*
- *REFRESH_VALIDATION*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Refresh Accounts Receivable*
- *Refresh Financial Aid*
- *Refresh General*
- *Refresh Student*
- *Refresh Validation Tables*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Only EDW Components Necessary to RAP (assumes ODS is refreshed)

If you have an enterprise wide EDW or a restricted license:

Note: The same job is used to both Load or Refresh All EDW Operational Stars and Load or Refresh All EDW Student Operational Stars, thus if you modified the jobs to only load the stars needed to support RAP (as opposed to all stars), just those stars will be refreshed as well.

Option 1 – Refresh EDW Via Modified Load/Refresh All EDW Operational Job

Via the BPRA Administrative Interface, run the following job as a Refresh: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh EDW in Stages

Via the BPRA Administrative Interface, run the following jobs as a Refresh in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational*:

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh Admissions Financial Aid Record Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure ODS and then EDW Operational Stars/Aggregates are up-to-date via load or refresh
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Operational or Schedule Enrollment Management Mappings*:
 - *Freeze Manage Applicant Concept Data*
 - *Freeze Impact of Aid on New Enrollment Concept Data*

SRP Operational Stars/Packages

The Banner Student Retention Performance (SRP) product focuses on two performance reporting packages and their snapshot counterparts: PM Analyze Student Progress (ASP) and PM Analyze Student Engagement (ASE). To utilize these concepts, ODS and EDW content based upon Banner Student, General, AR and Financial Aid data as well as the additional Banner Relationship Management (BRM) data. Depending on how you implement the warehouse components to support SRP (all at once or in stages) as well as what additional BPRA products you may use, there are various options.

Summary of Data Required

- ODS General, Student, AR, Financial Aid, Validation
- ODS Relationship Management (sourced by BRM)
- EDW General, Student* and Financial Aid Operational Stars
- EDW Relationship Management Operational Stars (sourced by BRM)
- Student Progress Aggregate
- Student Engagement Aggregate
- Freeze Student Progress Concept Data as desired
- Freeze Student Engagement Concept Data as desired

*Not all EDW Student Operational Stars are needed to support SRP, for the specific list, see details below.

Pre Load Steps

1. Some information populated within the ODS/EDW is based upon a person's preferred address information. This information is rule-based. Therefore, the ADDRESS_TYPE value that will be used to drive extraction logic within the ODS needs to be defined within the Banner GTVSDAX form. Only one address type can be defined for the preferred address.
2. Verify that staging processes are valid (via the Staging Area Status report).
3. Once the ODS is loaded, run these items one-time before the initial EDW load process to populate required data. Some of these components will be run with each refresh of the EDW, as well, but it is helpful to run them in advance of running all EDW components to streamline processing.
 - **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

- **Load the Warehouse Entity Dimension (Process Indicator = 'L')**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Warehouse Entity Dimension*

- **Load the Indicator Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Indicator Dimension*

- **Load the Calendar Date Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Calendar Date Dimension*

4. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*).

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

If you want to Load All ODS and EDW components necessary to support SRP at once

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Load All Student Retention Performance Warehouse Components*

Note: this will only load the ODS composite tables and EDW stars/aggregates which are needed to support SRP. Meaning it will not load ODS Finance, HR etc., nor all EDW Student stars, only the ones needed to support SRP.

Review the control report for your applicable job to ensure all the components have run successfully

If you have already loaded portions of your warehouse and/or you prefer to load your warehouse in stages, here are additional options

Load ODS Components Necessary to Support SRP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

If you have a restricted ODS license limited to objects which support SRP:

Option 1 – Load ODS Via Modified Load All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source SRP:

- *LOAD_AR*
- *LOAD_FINAID*
- *LOAD_GENERAL*
- *LOAD_STUDENT*
- *REFRESH_VALIDATION*
- *LOAD_RELATIONSHIP_MANAGEMENT*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

Option 2 – Load ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Load Accounts Receivable*
- *Load Financial Aid*
- *Load General*
- *Load Student*
- *Refresh Validation Tables*
- *Load Relationship Management*

Load EDW Components Necessary to Support SRP (assumes ODS is loaded)

If you have an enterprise wide EDW license:

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

If you have a restricted EDW license limited to objects which support SRP:

Option 1 – Load EDW Via Modified Load All EDW Operational Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner EDW Operational Stars Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1:
LOAD_EDW_ALL_OPERATIONAL

Modify the External Code values to be *N* for all entries **except** the following which are used to source SRP:

- *LOAD_DEFAULT_CLEANSING*
- *LOAD_EDW_DIM_WAREHOUSE_ENTITY*
- *LOAD_EDW_ACAD_OTCOM_HNR*
- *LOAD_EDW_ACADEMIC_OUTCOME*
- *LOAD_EDW_ADVISOR*
- *LOAD_EDW_ATHLETIC*
- *LOAD_EDW_BANNER_COMMUNICATION*
- *LOAD_EDW_RACE*
- *LOAD_EDW_CONTACT*

- LOAD_EDW_FINAID_APPLICATION
- LOAD_EDW_GRADE_CHANGE
- LOAD_EDW_INTEREST
- LOAD_EDW_MEETING_TIME
- LOAD_EDW_CRS_INST
- LOAD_EDW_COURSE_SECTION
- LOAD_EDW_POST_SECONDARY
- LOAD_EDW_PROSPECTIVE_STUDENT
- LOAD_EDW_SEC_SCHL_SUBJECT
- LOAD_EDW_STUDENT_ACTIVITY
- LOAD_EDW_STUDENT_ATTRIBUTE
- LOAD_EDW_STUDENT_COHORT
- LOAD_EDW_STUDENT_COURSE_ATTRIBUTE
- LOAD_EDW_STUDENT_COURSE
- LOAD_EDW_STUDENT_STAR
- LOAD_EDW_RETENTION_MULTI_YEAR
- LOAD_EDW_TEST
- LOAD_EDW_HOLD
- LOAD_EDW_INSTITUTION
- LOAD_EM_COMMUNICATION
- LOAD_EM_CAMPAIGN
- LOAD_EM_INTERACTION
- EM_COMBINED_REFRESH
- LOAD_EDW_GROUPS
- LOAD_EDW_ADMS_FINAID_AGG
- LOAD_EDW_STUD_PROG_AGG_INSERT
- LOAD_EDW_STUD_ENG_AGG_INSERT

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Load EDW in Stages

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner EDW Student Operational Stars Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_EDW_STUDENT*

Modify the External Code values to be *N* for all entries **except** the following which are used to source SRP:

- LOAD_DEFAULT_CLEANSING
- LOAD_EDW_DIM_WAREHOUSE_ENTITY
- LOAD_EDW_ACAD_OTCOM_HNR
- LOAD_EDW_ACADEMIC_OUTCOME
- LOAD_EDW_ADVISOR
- LOAD_EDW_ATHLETIC
- LOAD_EDW_BANNER_COMMUNICATION

- LOAD_EDW_CONTACT
- LOAD_EDW_FINAID_APPLICATION
- LOAD_EDW_GRADE_CHANGE
- LOAD_EDW_INTEREST
- LOAD_EDW_MEETING_TIME
- LOAD_EDW_CRS_INST
- LOAD_EDW_COURSE_SECTION
- LOAD_EDW_POST_SECONDARY
- LOAD_EDW_PROSPECTIVE_STUDENT
- LOAD_EDW_SEC_SCHL_SUBJECT
- LOAD_EDW_STUDENT_ACTIVITY
- LOAD_EDW_STUDENT_ATTRIBUTE
- LOAD_EDW_STUDENT_COHORT
- LOAD_EDW_STUDENT_COURSE_ATTRIBUTE
- LOAD_EDW_STUDENT_COURSE
- LOAD_EDW_STUDENT_STAR
- LOAD_EDW_RETENTION_MULTI_YEAR
- LOAD_EDW_TEST
- LOAD_EDW_GROUPS

Via the BPRA Administrative Interface, run the following jobs as Loads in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings:*

- Load/Refresh All Banner EDW General
- Load/Refresh All Banner EDW Student
- Load/Refresh All Banner EDW Financial Aid
- Load/Refresh All Banner EDW Relationship Management
- Load/Refresh Student Progress Aggregate
- Load/Refresh Student Engagement Aggregate

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Data

If you want to Refresh All ODS and EDW components necessary to support SRP at once

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Refresh All Student Retention Performance Warehouse Components*

Review the control report for the applicable job to ensure all the components have run successfully

If you have already refreshed portions of your warehouse and/or you prefer to refresh your warehouse in stages, here are additional options

Refresh ODS Components Necessary to Support SRP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

If you have a restricted ODS license limited to objects which support SRP:

Option 1 – Refresh ODS Via Modified Refresh All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Refresh All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *REFRESH_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source SRP:

- *REFRESH_AR*
- *REFRESH_FINAID*
- *REFRESH_GENERAL*
- *REFRESH_STUDENT*
- *REFRESH_VALIDATION*
- *REFRESH_RELATIONSHIP_MANAGEMENT*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Refresh Accounts Receivable*
- *Refresh Financial Aid*
- *Refresh General*
- *Refresh Student*
- *Refresh Validation Tables*
- *Refresh Relationship Management*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Only EDW Components Necessary to SRP (assumes ODS is refreshed)

If you have an enterprise wide EDW or a restricted license:

Note: The same job is used to both Load or Refresh All EDW Operational Stars and Load or Refresh All EDW Student Operational Stars, thus if you modified the jobs to only load the stars needed to support SRP (as opposed to all stars), just those stars will be refreshed as well.

Option 1 – Refresh EDW Via Modified Load/Refresh All EDW Operational Job

Via the BPRA Administrative Interface, run the following job as a Refresh: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh EDW in Stages

Via the BPRA Administrative Interface, run the following jobs as a Refresh in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational*:

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh All Banner EDW Relationship Management*
- *Load/Refresh Student Progress Aggregate*
- *Load/Refresh Student Engagement Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure ODS and then EDW Operational Stars/Aggregates are up-to-date via load or refresh
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Operational or Schedule Enrollment Management Mappings*:
 - *Freeze Student Progress Concept Data*
 - *Freeze Student Engagement Concept Data*

SRP Operational Stars/Packages without BRM

While the full functionality of Banner Student Retention Performance (SRP) requires licensing Banner Recruiting Management (BRM) and installing this add-on product in the Banner source database, it is not a requirement.

If you do not license BRM, you will not install any additional BRM sourced warehouse components during the SRP install, you will only install Cognos content. After you complete the import of Cognos content, you will be able to use reports and analytics that are based on the PM Analyze Student Progress (ASP) package. However, you will not be able to use the content and analytics based on the PM Analyze Student Engagement (ASE) package because it incorporates BRM-based data.

Since the additional warehouse installation/upgrade piece is not executed, no additional Enrollment Management or RAP specific Administrative Interface jobs will be created, only baseline EDW jobs will exist. Thus to load/refresh data to support SRP you may either load/refresh using the baseline ODS/EDW components independently or recreate the overall SRP jobs mentioned in other sections of this document. In order to create Enrollment Management menu option and the SRP overall load and refresh jobs, run the `mtvparm_jobs_data_brm.sql` and `mtvparm_jobs_data_srp.sql` scripts attached to this FAQ in your environment connected as `IA_ADMIN`. This will enter additional MTVPARM records to generate those jobs.

Summary of Data Required

- ODS General, Student, AR, Financial Aid, Validation
- ODS Relationship Management (sourced by BRM)
- EDW General, Student* and Financial Aid Operational Stars

- Student Progress Aggregate
- Freeze Student Progress Concept Data as desired

*Not all EDW Student Operational Stars are needed to support SRP, for the specific list, see details below.

Pre Load Steps

1. Some information populated within the ODS/EDW is based upon a person's preferred address information. This information is rule-based. Therefore, the ADDRESS_TYPE value that will be used to drive extraction logic within the ODS needs to be defined within the Banner GTVSDAX form. Only one address type can be defined for the preferred address.
2. Verify that staging processes are valid (via the Staging Area Status report).
3. Once the ODS is loaded, run these items one-time before the initial EDW load process to populate required data. Some of these components will be run with each refresh of the EDW, as well, but it is helpful to run them in advance of running all EDW components to streamline processing.

- **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

- **Load the Warehouse Entity Dimension (Process Indicator = 'L')**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Warehouse Entity Dimension*

- **Load the Indicator Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Indicator Dimension*

- **Load the Calendar Date Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Calendar Date Dimension*

4. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*).

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

If you ran the additional scripts attached to this FAQ and want to Load All ODS and EDW components necessary to support SRP at once

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Load All Student Retention Performance Warehouse Components*

Note: this will only load the ODS composite tables and EDW stars/aggregates which are needed to support SRP. Meaning it will not load ODS Finance, HR etc., nor all EDW Student stars, only the ones needed to support SRP.

Review the control report for your applicable job to ensure all the components have run successfully

If you have already loaded portions of your warehouse and/or you prefer to load your warehouse in stages, here are additional options

Load ODS Components Necessary to Support SRP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

If you have a restricted ODS license limited to objects which support SRP:

Option 1 – Load ODS Via Modified Load All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source SRP:

- *LOAD_AR*
- *LOAD_FINAID*
- *LOAD_GENERAL*
- *LOAD_STUDENT*
- *REFRESH_VALIDATION*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

Option 2 – Load ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Load Accounts Receivable*
- *Load Financial Aid*
- *Load General*
- *Load Student*
- *Refresh Validation Tables*

Load EDW Components Necessary to Support SRP (assumes ODS is loaded)

If you have an enterprise wide EDW license:

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

If you have a restricted EDW license limited to objects which support SRP:

Option 1 – Load EDW Via Modified Load All EDW Operational Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner EDW Operational Stars Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1:
LOAD_EDW_ALL_OPERATIONAL

Modify the External Code values to be *N* for all entries **except** the following which are used to source SRP:

- *LOAD_DEFAULT_CLEANSING*
- *LOAD_EDW_DIM_WAREHOUSE_ENTITY*
- *LOAD_EDW_ACAD_OTCOM_HNR*
- *LOAD_EDW_ACADEMIC_OUTCOME*
- *LOAD_EDW_ADVISOR*
- *LOAD_EDW_ATHLETIC*
- *LOAD_EDW_BANNER_COMMUNICATION*
- *LOAD_EDW_RACE*
- *LOAD_EDW_CONTACT*
- *LOAD_EDW_FINAID_APPLICATION*
- *LOAD_EDW_GRADE_CHANGE*
- *LOAD_EDW_INTEREST*
- *LOAD_EDW_MEETING_TIME*
- *LOAD_EDW_CRS_INST*
- *LOAD_EDW_COURSE_SECTION*
- *LOAD_EDW_POST_SECONDARY*
- *LOAD_EDW_PROSPECTIVE_STUDENT*
- *LOAD_EDW_SEC_SCHL_SUBJECT*
- *LOAD_EDW_STUDENT_ACTIVITY*
- *LOAD_EDW_STUDENT_ATTRIBUTE*
- *LOAD_EDW_STUDENT_COHORT*
- *LOAD_EDW_STUDENT_COURSE_ATTRIBUTE*
- *LOAD_EDW_STUDENT_COURSE*
- *LOAD_EDW_STUDENT_STAR*
- *LOAD_EDW_RETENTION_MULTI_YEAR*
- *LOAD_EDW_TEST*
- *LOAD_EDW_HOLD*
- *LOAD_EDW_INSTITUTION*
- *LOAD_EDW_GROUPS*
- *LOAD_EDW_ADMS_FINAID_AGG*
- *LOAD_EDW_STUD_PROG_AGG_INSERT*

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Load EDW in Stages

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner EDW Student Operational Stars Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_EDW_STUDENT*

Modify the External Code values to be *N* for all entries **except** the following which are used to source SRP:

- *LOAD_DEFAULT_CLEANSING*
- *LOAD_EDW_DIM_WAREHOUSE_ENTITY*
- *LOAD_EDW_ACAD_OTCOM_HNR*
- *LOAD_EDW_ACADEMIC_OUTCOME*
- *LOAD_EDW_ADVISOR*
- *LOAD_EDW_ATHLETIC*
- *LOAD_EDW_BANNER_COMMUNICATION*
- *LOAD_EDW_CONTACT*
- *LOAD_EDW_FINAID_APPLICATION*
- *LOAD_EDW_GRADE_CHANGE*
- *LOAD_EDW_INTEREST*
- *LOAD_EDW_MEETING_TIME*
- *LOAD_EDW_CRS_INST*
- *LOAD_EDW_COURSE_SECTION*
- *LOAD_EDW_POST_SECONDARY*
- *LOAD_EDW_PROSPECTIVE_STUDENT*
- *LOAD_EDW_SEC_SCHL_SUBJECT*
- *LOAD_EDW_STUDENT_ACTIVITY*
- *LOAD_EDW_STUDENT_ATTRIBUTE*
- *LOAD_EDW_STUDENT_COHORT*
- *LOAD_EDW_STUDENT_COURSE_ATTRIBUTE*
- *LOAD_EDW_STUDENT_COURSE*
- *LOAD_EDW_STUDENT_STAR*
- *LOAD_EDW_RETENTION_MULTI_YEAR*
- *LOAD_EDW_TEST*
- *LOAD_EDW_GROUPS*

Via the BPRA Administrative Interface, run the following jobs as Loads in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings*:

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh Student Progress Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Data

If you ran the additional scripts attached to this FAQ and want to Refresh All ODS and EDW components necessary to support SRP at once

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Refresh All Student Retention Performance Warehouse Components*

Review the control report for the applicable job to ensure all the components have run successfully

If you have already refreshed portions of your warehouse and/or you prefer to refresh your warehouse in stages, here are additional options

Refresh ODS Components Necessary to Support SRP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

If you have a restricted ODS license limited to objects which support SRP:

Option 1 – Refresh ODS Via Modified Refresh All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Refresh All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *REFRESH_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source SRP:

- *REFRESH_AR*
- *REFRESH_FINAID*
- *REFRESH_GENERAL*
- *REFRESH_STUDENT*
- *REFRESH_VALIDATION*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Refresh Accounts Receivable*
- *Refresh Financial Aid*
- *Refresh General*
- *Refresh Student*
- *Refresh Validation Tables*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Only EDW Components Necessary to SRP (assumes ODS is refreshed)

If you have an enterprise wide EDW or a restricted license:

Note: The same job is used to both Load or Refresh All EDW Operational Stars and Load or Refresh All EDW Student Operational Stars, thus if you modified the jobs to only load the stars needed to support SRP (as opposed to all stars), just those stars will be refreshed as well.

Option 1 – Refresh EDW Via Modified Load/Refresh All EDW Operational Job

Via the BPRA Administrative Interface, run the following job as a Refresh: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh EDW in Stages

Via the BPRA Administrative Interface, run the following jobs as a Refresh in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational:*

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh Student Progress Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure ODS and then EDW Operational Stars/Aggregates are up-to-date via load or refresh
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Operational or Schedule Enrollment Management Mappings:*
 - *Freeze Student Progress Concept Data*

RAP and SRP Together

The Banner Recruiting and Admissions Performance (RAP) and Banner Student Retention Performance (SRP) product combine to give you five performance reporting packages and their snapshot counterparts: PM Manage Applicants (MA), PM Impact of Aid on New Enrollment (IANE), PM Analyze Enrollment Funnel (AEF), PM Analyze Student Progress (ASP) and PM Analyze Student Engagement (ASE). To utilize these concepts, ODS and EDW content based upon Banner Student, General, AR and Financial Aid data as well as the additional Banner Relationship Management (BRM) data. Depending on how you implement the warehouse components to support RAP and SRP (all at once or in stages) as well as what additional BPRA products you may use, there are various options

Summary of Data Required

- ODS General, Student, AR, Financial Aid, Validation
- ODS Relationship Management (sourced by BRM)

- EDW General, Student and Financial Aid Operational Stars
- EDW Relationship Management Operational Stars (sourced by BRM)
- Admissions Financial Aid Record Aggregate
- Student Progress Aggregate
- Student Engagement Aggregate
- Freeze Manage Applicant Concept Data as desired
- Freeze Impact of Aid on New Enrollment Concept Data as desired
- Freeze Analyze Enrollment Funnel Concept Data as desired
- Freeze Student Progress Concept Data as desired
- Freeze Student Engagement Concept Data as desired

Pre Load Steps

1. Some information populated within the ODS/EDW is based upon a person's preferred address information. This information is rule-based. Therefore, the ADDRESS_TYPE value that will be used to drive extraction logic within the ODS needs to be defined within the Banner GTVSDAX form. Only one address type can be defined for the preferred address.
2. Verify that staging processes are valid (via the Staging Area Status report).
3. Once the ODS is loaded, run these items one-time before the initial EDW load process to populate required data. Some of these components will be run with each refresh of the EDW, as well, but it is helpful to run them in advance of running all EDW components to streamline processing.

- **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

- **Load the Warehouse Entity Dimension (Process Indicator = 'L')**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Warehouse Entity Dimension*

- **Load the Indicator Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Indicator Dimension*

- **Load the Calendar Date Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Calendar Date Dimension*

4. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*).

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

If you want to Load All ODS and EDW components necessary to support RAP and SRP at once

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Load All Banner Performance Reporting & Analytics Warehouse Components*

Note: this will only load the ODS composite tables and EDW stars/aggregates which are needed to support RAP and SRP. Meaning it will not load ODS Finance, HR etc. only the objects needed to support RAP and SRP. If you have an enterprise license and wish to turn these pieces on, modify the *LOAD_ALL_ODS_EDW_EM* job parameters to do so.

Review the control report for your applicable job to ensure all the components have run successfully

If you have already loaded portions of your warehouse and/or you prefer to load your warehouse in stages, here are additional options

Load ODS Components Necessary to Support RAP and SRP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

If you have a restricted ODS license limited to objects which support RAP and SRP:

Option 1 – Load ODS Via Modified Load All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP and SRP:

- *LOAD_AR*
- *LOAD_FINAID*
- *LOAD_GENERAL*
- *LOAD_STUDENT*
- *REFRESH_VALIDATION*
- *LOAD_RELATIONSHIP_MANAGEMENT*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

Option 2 – Load ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Load Accounts Receivable*
- *Load Financial Aid*
- *Load General*

- *Load Student*
- *Refresh Validation Tables*
- *Load Relationship Management*

Load EDW Components Necessary to Support RAP and SRP (assumes ODS is loaded)

If you have an enterprise wide EDW or a restricted EDW license limited to objects which support RAP and SRP:

Option 1 – Load EDW Via Load All EDW Operational Job

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Load EDW in Stages

Via the BPRA Administrative Interface, run the following jobs as Loads in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings:*

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh All Banner EDW Relationship Management*
- *Load/Refresh Admissions Financial Aid Record Aggregate*
- *Load/Refresh Student Progress Aggregate*
- *Load/Refresh Student Engagement Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Data

If you want to Refresh All ODS and EDW components necessary to support RAP and SRP at once

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Refresh All Banner Performance Reporting & Analytics Warehouse Components*

Note: this will only refresh the ODS composite tables and EDW stars/aggregates which are needed to support RAP and SRP. Meaning it will not refresh ODS Finance, HR etc. only the objects needed to support RAP and SRP. If you have an enterprise license and wish to turn these pieces on, modify the REFRESH_ALL_ODS_EDW_EM job parameters to do so.

Review the control report for the applicable job to ensure all the components have run successfully

If you have already refreshed portions of your warehouse and/or you prefer to refresh your warehouse in stages, here are additional options

Refresh ODS Components Necessary to Support RAP and SRP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

If you have a restricted ODS license limited to objects which support RAP and SRP:

Option 1 – Refresh ODS Via Modified Refresh All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Refresh All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *REFRESH_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP and SRP:

- *REFRESH_AR*
- *REFRESH_FINAID*
- *REFRESH_GENERAL*
- *REFRESH_STUDENT*
- *REFRESH_VALIDATION*
- *REFRESH_RELATIONSHIP_MANAGEMENT*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Refresh Accounts Receivable*
- *Refresh Financial Aid*
- *Refresh General*
- *Refresh Student*
- *Refresh Validation Tables*
- *Refresh Relationship Management*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Only EDW Components Necessary to RAP and SRP (assumes ODS is refreshed)

If you have an enterprise wide EDW or a restricted license:

Option 1 – Refresh EDW Via Modified Load/Refresh All EDW Operational Job

Via the BPRA Administrative Interface, run the following job as a Refresh: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh EDW in Stages

Via the BPRA Administrative Interface, run the following jobs as a Refresh in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational*:

- *Load/Refresh All Banner EDW General*

- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh All Banner EDW Relationship Management*
- *Load/Refresh Admissions Financial Aid Record Aggregate*
- *Load/Refresh Student Progress Aggregate*
- *Load/Refresh Student Engagement Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure ODS and then EDW Operational Stars/Aggregates are up-to-date via load or refresh
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Operational or Schedule Enrollment Management Mappings*:
 - *Freeze Manage Applicant Concept Data*
 - *Freeze Impact of Aid on New Enrollment Concept Data*
 - *Freeze Analyze Enrollment Funnel Concept Data*
 - *Freeze Student Progress Concept Data*
 - *Freeze Student Engagement Concept Data*

RAP and SRP Together without BRM

While the full functionality of Banner Recruiting and Admissions Performance (RAP) and Banner Student Retention Performance (SRP) requires licensing Banner Recruiting Management (BRM) and installing this add-on product in the Banner source database, it is not a requirement.

If you do not license BRM, you will not install any additional BRM sourced warehouse components during the RAP or SRP installs, you will only install Cognos content. After you complete the import of Cognos content, you will be able to use reports and analytics that are based on the PM Impact of Aid on New Enrollment (IANE), PM Manage Applicants (MA) and PM Analyze Student Progress (ASP) packages. However, you will not be able to use the content and analytics based on the PM Analyze Enrollment Funnel (AEF) and PM Analyze Student Engagement (ASE) packages because they incorporate BRM-based data.

Since the additional warehouse installation/upgrade piece is not executed, no additional Enrollment Management or RAP specific Administrative Interface jobs will be created, only baseline EDW jobs will exist. Thus to load/refresh data to support RAP and SRP you may either load/refresh using the baseline ODS/EDW components independently or recreate the overall RAP and SRP jobs mentioned in other sections of this document. In order to create Enrollment Management menu option and the RAP and SRP overall load and refresh jobs, run the `mtvparm_jobs_data_brm.sql`, `mtvparm_jobs_data_rap.sql`, `mtvparm_jobs_data_srp.sql`, `mtvparm_jobs_data_brm_overall.sql`, `mtvparm_jobs_data_rap_overall.sql`, and `mtvparm_jobs_data_srp_overall.sql` scripts attached to this FAQ in your environment connected as `IA_ADMIN`. This will enter additional MTVPARM records to generate those jobs.

Summary of Data Required

- ODS General, Student, AR, Financial Aid, Validation
- EDW General, Student and Financial Aid Operational Stars
- Admissions Financial Aid Record Aggregate
- Student Progress Aggregate
- Freeze Manage Applicant Concept Data as desired
- Freeze Impact of Aid on New Enrollment Concept Data as desired
- Freeze Student Progress Concept Data as desired

Pre Load Steps

1. Some information populated within the ODS/EDW is based upon a person's preferred address information. This information is rule-based. Therefore, the ADDRESS_TYPE value that will be used to drive extraction logic within the ODS needs to be defined within the Banner GTVSDAX form. Only one address type can be defined for the preferred address.
2. Verify that staging processes are valid (via the Staging Area Status report).
3. Run these items one-time before the initial EDW load process to populate required data. Some of these components will be run with each refresh of the EDW, as well, but it is helpful to run them in advance of running all EDW components to streamline processing.

- **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

- **Load the Warehouse Entity Dimension (Process Indicator = 'L')**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Warehouse Entity Dimension*

- **Load the Indicator Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Indicator Dimension*

- **Load the Calendar Date Dimension**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh Calendar Date Dimension*

4. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*).

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

If you ran the additional scripts attached to this FAQ and want to Load All ODS and EDW components necessary to support RAP and SRP at once

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Load All Banner Performance Reporting & Analytics Warehouse Components*

Note: this will only load the ODS composite tables and EDW stars/aggregates which are needed to support RAP and SRP. Meaning it will not load ODS Finance, HR etc. only the objects needed to support RAP and SRP. If you have an enterprise license and wish to turn these pieces on, modify the `LOAD_ALL_ODS_EDW_EM` job parameters to do so.

Review the control report for your applicable job to ensure all the components have run successfully

If you have already loaded portions of your warehouse and/or you prefer to load your warehouse in stages, here are additional options

Load ODS Components Necessary to Support RAP and SRP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

If you have a restricted ODS license limited to objects which support RAP and SRP:

Option 1 – Load ODS Via Modified Load All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Load All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *LOAD_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP and SRP:

- *LOAD_AR*
- *LOAD_FINAID*
- *LOAD_GENERAL*
- *LOAD_STUDENT*
- *REFRESH_VALIDATION*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Load All Banner ODS Products*

Option 2 – Load ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Load Accounts Receivable*
- *Load Financial Aid*
- *Load General*

- *Load Student*
- *Refresh Validation Tables*

Load EDW Components Necessary to Support RAP and SRP (assumes ODS is loaded)

If you have an enterprise wide EDW or a restricted EDW license limited to objects which support RAP and SRP:

Option 1 – Load EDW Via Load All EDW Operational Job

Via the BPRA Administrative Interface, run the following job as a Load: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Load EDW in Stages

Via the BPRA Administrative Interface, run the following jobs as Loads in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings:*

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*
- *Load/Refresh Admissions Financial Aid Record Aggregate*
- *Load/Refresh Student Progress Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Data

If you ran the additional scripts attached to this FAQ and want to Refresh All ODS and EDW components necessary to support RAP and SRP at once

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Enrollment Management Mappings > Refresh All Banner Performance Reporting & Analytics Warehouse Components*

Note: this will only refresh the ODS composite tables and EDW stars/aggregates which are needed to support RAP and SRP. Meaning it will not refresh ODS Finance, HR etc. only the objects needed to support RAP and SRP. If you have an enterprise license and wish to turn these pieces on, modify the REFRESH_ALL_ODS_EDW_EM job parameters to do so.

Review the control report for the applicable job to ensure all the components have run successfully

If you have already refreshed portions of your warehouse and/or you prefer to refresh your warehouse in stages, here are additional options

Refresh ODS Components Necessary to Support RAP and SRP

If you have an enterprise wide ODS license:

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

If you have a restricted ODS license limited to objects which support RAP and SRP:

Option 1 – Refresh ODS Via Modified Refresh All Job

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Select the control group which manages the Refresh All Banner ODS Products Job:

Select Internal Group: *ETL CONTROL GROUP*; Internal Code 1: *REFRESH_ALL*

Modify the External Code values to be *N* for all entries **except** the following which are used to source RAP and SRP:

- *REFRESH_AR*
- *REFRESH_FINAID*
- *REFRESH_GENERAL*
- *REFRESH_STUDENT*
- *REFRESH_VALIDATION*

Via the BPRA Administrative Interface, run the following job: *Options > Schedule A Process > Schedule Banner ODS Mappings > Refresh All Banner ODS Products*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh ODS in Stages

Via the BPRA Administrative Interface, run the following jobs in successive order: *Options > Schedule A Process > Schedule Banner ODS Mappings*:

- *Refresh Accounts Receivable*
- *Refresh Financial Aid*
- *Refresh General*
- *Refresh Student*
- *Refresh Validation Tables*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Only EDW Components Necessary to RAP and SRP (assumes ODS is refreshed)

If you have an enterprise wide EDW or a restricted license:

Option 1 – Refresh EDW Via Modified Load/Refresh All EDW Operational Job

Via the BPRA Administrative Interface, run the following job as a Refresh: *Options > Schedule A Process > Schedule Banner EDW Operational Mappings > Load/Refresh All Banner EDW Operational Stars*

Review the control report for the applicable job to ensure all the components have run successfully

Option 2 – Refresh EDW in Stages

Via the BPRA Administrative Interface, run the following jobs as a Refresh in successive order: *Options > Schedule A Process > Schedule Banner EDW Operational*:

- *Load/Refresh All Banner EDW General*
- *Load/Refresh All Banner EDW Student*
- *Load/Refresh All Banner EDW Financial Aid*

- *Load/Refresh Admissions Financial Aid Record Aggregate*
- *Load/Refresh Student Progress Aggregate*

Review the control report for the applicable job to ensure all the components have run successfully

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure ODS and then EDW Operational Stars/Aggregates are up-to-date via load or refresh
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Operational or Schedule Enrollment Management Mappings*:
 - *Freeze Manage Applicant Concept Data*
 - *Freeze Impact of Aid on New Enrollment Concept Data*
 - *Freeze Student Progress Concept Data*

AAC Operational Stars/Business Concepts

Summary of Data Required

- EDW Advancement Operational Stars
- Manage Prospect Pipeline Aggregates
- Analyze Fundraising Aggregate
- Research and Qualified Potential Prospect Aggregates (Entity and Institution)
- Research and Qualified Potential Prospect Aggregates (Designation College), optional
- Research and Qualified Potential Prospect Aggregates (Designation Department), optional
- Freeze Analyze Fundraising Aggregate as desired
- Freeze Manage Prospect Pipeline Aggregate as desired
- Freeze Manage Prospect Pipeline A Aggregate as desired
- Freeze Manage Prospect Pipeline B Aggregate as desired

Architecture notes

- Though this is baseline EDW content, it is optionally installed/upgraded during the EDW install/upgrade process
- This content supports AAC/AP reporting
- This content is loaded using a different ETL methodology than the baseline EDW General, Student and Financial Aid content. The Advancement EDW content loads all dimensions and then loads all facts and aggregates. The General, Student and Financial Aid stars are loaded star by star.
- There currently is not refresh option for this content, it is always reloaded. One exception is the RQPP content which can be reloaded for the current year or a specific year only (as opposed to all years).
- There is no ODS source for these EDW stars, Advancement stars are loaded directly from staged source tables.

Pre Load Steps

1. Verify that staging processes are valid (via the Staging Area Status report).
2. Run load processes to populate required cleansing data.
 - **Load the EDW Cleansing Values**

Via the BPRA Administrative Interface: *Options > Schedule A Process > Banner EDW Utilities > Load Banner EDW Dimensional Data Default Cleansing Values*

When choosing the value for the *Cleansing Element to Load* parameter, select *Load_All_Elements*

- **Verify site-specific cleansing value changes are in place when loading to a new environment for the first time. This includes any site-specific event definitions.**

Via the BPRA Administrative Interface: *Options > Set Up and Maintain Cleansing Processes*

3. Ensure appropriate site-specific extract parameters have been defined. (For more information refer to the *Define EDW Extract Parameters* section in the *Enterprise Data Warehouse User Guide*.)

Via the BPRA Administrative Interface: *Options > Set Up Parameters*

Review/update *EDW EXTRACT PARAMETERS* for the applicable business concepts at your institution. See *EDW Performance Management Resource Matrix* or *Set Up Data* section of the *Enterprise Data Warehouse User Guide* for a complete list and explanation.

Load Data

Run applicable load process for Advancement data mappings

If a Banner Advancement site

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Banner EDW Complete Load/Refresh*

If an Advance site

Via the BPRA Administrative Interface: *Options > Schedule A Process > Schedule Advance EDW Complete Load/Refresh*

Review the control report for the applicable job to ensure all the components have run successfully

Refresh Data

There is no refresh option at this time for EDW Operational Advancement content. One exception is the RQPP content which can be reloaded for the current year or a specific year only (as opposed to all years).

Freeze Data

1. Ensure desired EVENT-EDW event values are established. For additional details, see the *Freeze or Snapshot Banner EDW Business Concept* section of the *Enterprise Data Warehouse Administration Guide*.
2. Ensure EDW Operational Stars/Aggregates are up-to-date
3. Via the BPRA Administrative Interface, run the following job or jobs with desired event on corresponding event dates: *Options > Schedule A Process > Schedule Banner EDW Freeze Aggregates*:
 - *Freeze Analyze Fundraising Aggregate*
 - *Freeze Manage Prospect Pipeline Aggregate*
 - *Freeze Manage Prospect Pipeline A Aggregate*
 - *Freeze Manage Prospect Pipeline B Aggregate*

EDW Baseline Advancement/AAC Operational with other EDW Baseline, RAP or SRP Operational with or without BRM

Currently, there are no delivered jobs which combine the EDW Baseline Advancement/AAC Operational content with other EDW Baseline (Student, Finaid, General), RAP or SRP Operational content. If your site utilizes all these products together, the two sets of jobs cannot be run concurrently as they have shared dimensions and contention issues could arise. However, since the Advancement content is not sourced off of the ODS (but rather directly from the staged tables), the Advancement operational content could be reloaded at the same time your ODS refresh is running. Once the Advancement dimensions are updated and the ODS content refreshed, the additional EDW Baseline, RAP or SRP operational content could start its refresh.

Configure/Load Cognos Components

Parameter Maps

Components of the EDW Business Concepts designed with Cognos Framework Manager use Parameter Maps to specify how information will display in reports that you run against the warehouse. For example, you use parameter maps to define the current year of giving, age ranges, and your institution's fiscal start month or credit ranges for grouping students.

If you are using any of the Cognos packages delivered with the EDW, you need to review each of the Parameter Maps, determine which maps affect data used by your institution, and create your institution's desired Parameter Map values using the Administrative Interface. To determine which Parameter Maps your institution needs to review and update, refer to the *Set Up Parameter Maps* section of the *Enterprise Data Warehouse User Guide*, which lists each Parameter Map and which Business Concepts use it.

Although it is best to set up Parameter Maps before you initially load the warehouse, it is not imperative that you do so. You can set up the parameter maps after warehouse data has been loaded.

Build/Deploy Cognos Cubes

For detailed instructions refer to the *Load and Publish Cubes* section in the *Enterprise Data Warehouse Administration Guide*.

Daily Administrative Tasks

- Verify that the listener and database are up and available
- Execute and review the staging area status
- Verify that the OWB Repository service is available
- Review the status of the nightly refreshes
- Execute and review the ODS and EDW health checks
- Verify that the BPRA metadata is available for end-users
- Review the status of the nightly cube build and deploy process