

RECORD CREATION

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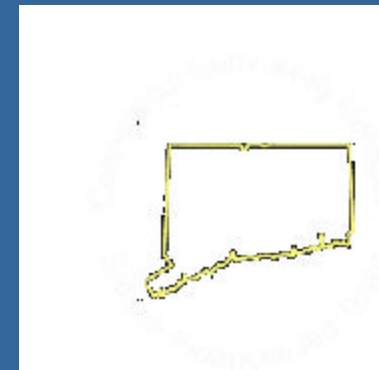
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Data Load Report/Summary attachment

R CRSUSP 9-10

R CRSUSP Process attachment

RECORD CREATION



Connecticut Community Colleges

GENERAL INFORMATION

- “B” – “M” College Code
 - Each college is assigned a letter (B - M) and a number (02-13) which identifies the specific college.
 - This code allows data to remain separate and to be seen only at the appropriate college

College Codes

A - 01	Chancellors Office
B - 02	Manchester Community College
C - 03	Northwestern Community College
D - 04	Norwalk Community College
E - 05	Housatonic Community College
F - 06	Middlesex Community College
G - 07	Capital Community College
H - 08	Naugatuck Valley Community College
I - 09	Gateway Community College
J - 10	Tunxis Community College
K - 11	Three Rivers Community College
L - 12	Quinebaug Valley Community College
M - 13	Asnuntuck Community College
X	Connecticut Community Colleges

GENERAL INFORMATION (cont.)

- Naming Conventions of Banner Forms
 - All Banner forms (except menus) have seven characters and follow a specific structure which is outlined on the following page. Financial Aid forms, reports, jobs and tables always begin with the letter "R".

Naming Conventions

Naming Conventions

All Banner2000 forms (except menus), reports, jobs, and tables have seven-character names with the following structure:

Example	R	O	A	I	N	S	T
Position Locations	1	2	3	4	5	6	7

Position 1	Position 2	Position 3
Identifies the system owning the form, report, process, or table.	Identifies the application module owning the form, report, process, or table.	Identifies the type of form, report, process, or table.
A Alumni/Development	If the character in position 1 is R, then the character in position 2 is:	A Application form
B Property Tax	B Budgeting	B Base table
C Courts	C Record Creation	I Inquiry form
D Cash Drawer	E Electronic Data Exchange (EDE)	P Process/report
F Finance	F Funds Management	R Rule form
G General	H History and Transcripts	Repeating rules table
K Work Management	J Student Employment	Report
L Occupational Tax and License	L Logging	T Temporary table
N Position Control	N Need Analysis	V Validation table
O Customer Contact	O Common Functions	View
P Human Resources/ Payroll/ Personnel	P Packaging and Disbursements	
Q Electronic Work Queue	R Requirements Tracking	
R Financial Aid	S Student System Shared Data	
S Student	T Validation Form/Table	
T Accounts Receivable	W Reserved for client-developed forms or modules used within a Banner2000 application (character in position 1 not equal to W, Y, or Z)	
U Utilities	Y	
V Voice Response	Z	
X Records Indexing		
W Reserved for client applications that co-exist with Banner2000		
Y		
Z		

Positions 4, 5, 6, and 7
Identify a unique, four-character name for the form, report, process, or table.

ROAINST

R	Financial Aid
O	Common Functions
A	Application
INST	Institutional Options

RBRBCMP

R	Financial Aid
B	Budgeting
R	Report
BCmp	Budget Component

RTVBTP

R	Financial Aid
T	Table
V	Validation
BTYP	Budget Type

Naming Conventions

All Banner2000 forms (except menus), reports, jobs, and tables have seven character names with the following structure:

Example	R	O	A	I	N	S	T
Position Locations	1	2	3	4	5	6	7

Position 1	
Identifies the system owning the form, report, process, or table.	
A	Alumni/Development
B	Property Tax
C	Courts
D	Cash Drawer
F	Finance
G	General
K	Work Management
L	Occupational Tax and License
N	Position Control
O	Customer Contact
P	Human Resources/ Payroll/ Personnel
Q	Electronic Work Queue
R	Financial Aid
S	Student
T	Accounts Receivable
U	Utilities
V	Voice Response
X	Records Indexing
W	Reserved for client applications that co-exist with Banner2000
Y	
Z	

Position 2	
Identifies the application module owning the form, report, process, or table.	
If the character in position 1 is R , then the character in position 2 is:	
B	Budgeting
C	Record Creation
E	Electronic Data Exchange (EDE)
F	Funds Management
H	History and Transcripts
J	Student Employment
L	Logging
N	Need Analysis
O	Common Functions
P	Packaging and Disbursements
R	Requirements Tracking
S	Student System Shared Data
T	Validation Form/Table
W	Reserved for client-developed forms or modules used within a Banner2000 application (character in position 1 not equal to W, Y, or Z)
Y	
Z	

Position 3	
Identifies the type of form, report, process, or table.	
A	Application form
B	Base table
I	Inquiry form
P	Process/report
R	Rule form
	Repeating rules table
	Report
T	Temporary table
V	Validation table
	View

Positions 4, 5, 6, and 7
Identify a unique, four-character name for the form, report, process, or table.

ROAINST

R	Financial Aid
O	Common Functions
A	Application
INST	Institutional Options

RBRBCMP

R	Financial Aid
B	Budgeting
R	Report
BCmp	Budget Component

RTVBTYPE

R	Financial Aid
T	Table
V	Validation
BTYP	Budget Type

SET-UP

- RTVINFC – identifies I SIR as source document from EDE download
- RCRI NFR – specifies matching requirements for incoming I SIR S
- Map a drive to the NT server at the System Data Center

SET-UP (cont.)

RTVINFC – identifies ISIR as source document from EDE download

Interface Data Code Validation Form (RTVINFC 3.3)(DEVL) [M_FATEST]

Source Code	Source Description	Requirements			Stat	Recr Contact		Activity Date
		Code	Supp	Src		Type		
ACT	ACT Tape					F00005	FIN	04-FEB-1995
ACT-CSS	ACT Tape in CSS format					F00005	FIN	04-FEB-1995
AFSA	AFSA Tape	FAFSA			S	F00005	FIN	04-FEB-1995
EDE	EDE Record	ISIR			S	F00005	FIN	28-JAN-1999
GAP-CSS	GAPSFAS Tape in CSS Format					F00005	FIN	09-JAN-1992
ISIR	ISIR Record from CPS							25-JUN-1999
MANUAL	Manual Entry					F00005	FIN	04-FEB-1995
PHEAA	PHEAA Tape					F00005	FIN	09-JAN-1992
SIM	For online N/A simulation only							16-SEP-1997
USAF	USAF Tape					F00005	FIN	04-FEB-1995
USAFACT	USAF Tape in ACT format					F00005	FIN	04-FEB-1995
USAFCSS	USAF Tape in CSS format					F00005	FIN	04-FEB-1995

Select Rollback Save Exit

SET-UP (cont.)

RCRI NFR – specifies matching requirements for incoming ISIRS

Interface Data Matching Rules Form (RCRINFR 3.3)(DEVL) [M_FATEST]

Aid Year: 9900 Source Code: EDE EDE Record

Matching Rules

	SSN	Last Name	First Name	Middle Initial	Birthdate			Gender
					Month	Day	Year	
Indicator:	<input type="checkbox"/> R	<input type="checkbox"/> R	<input type="checkbox"/> R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length:	<input type="text" value="9"/>	<input type="text" value="16"/>	<input type="text" value="9"/>					

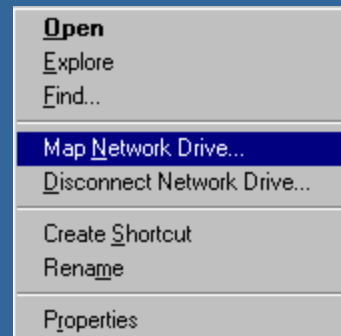
	Address				Telephone	
	Address	City	State	Zip	Area Code	Number
Indicator:	<input type="checkbox"/>	<input type="checkbox"/> R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length:	<input type="text"/>	<input type="text" value="0"/>		<input type="text"/>		

Rollback Save Exit

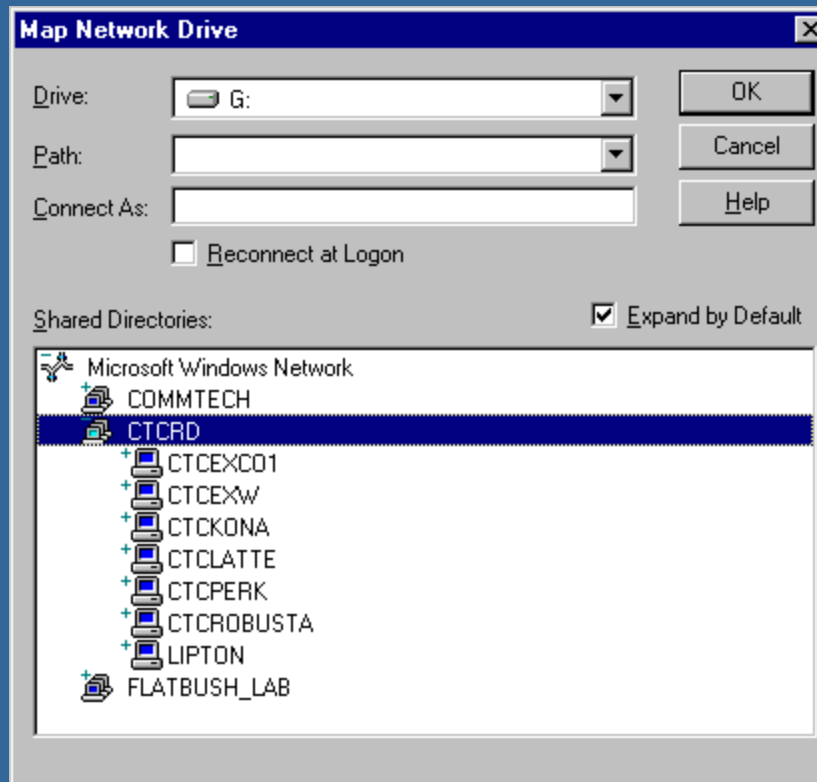
SET-UP (cont.)

Map a drive to the NT server at the System Data Center

- Right click on My Computer
- Click on Map Network Drive



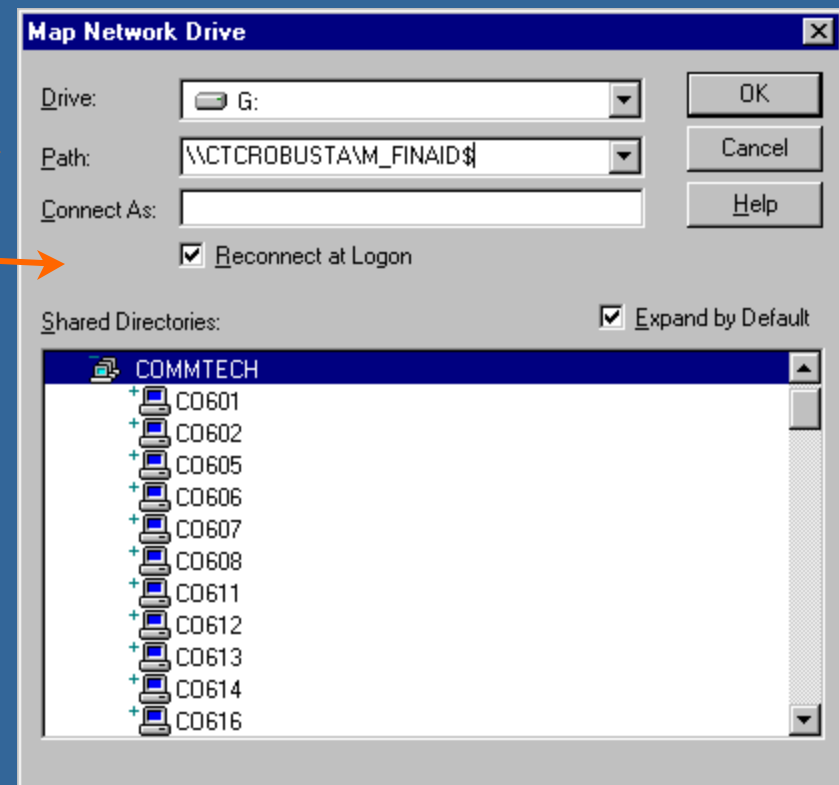
Mapping a Network Drive



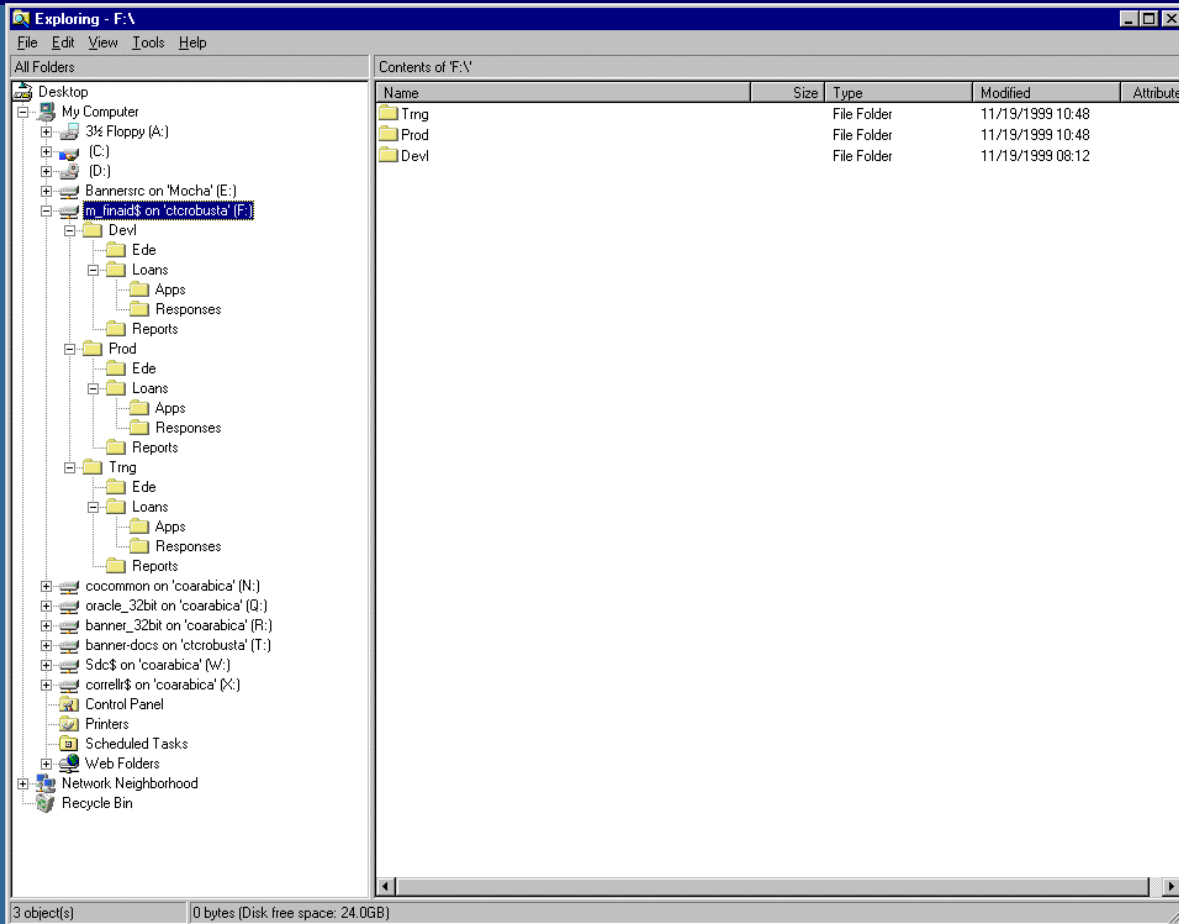
Mapping a Network Drive (cont.)

\\CTCROBUSTA\%_FINAID\$

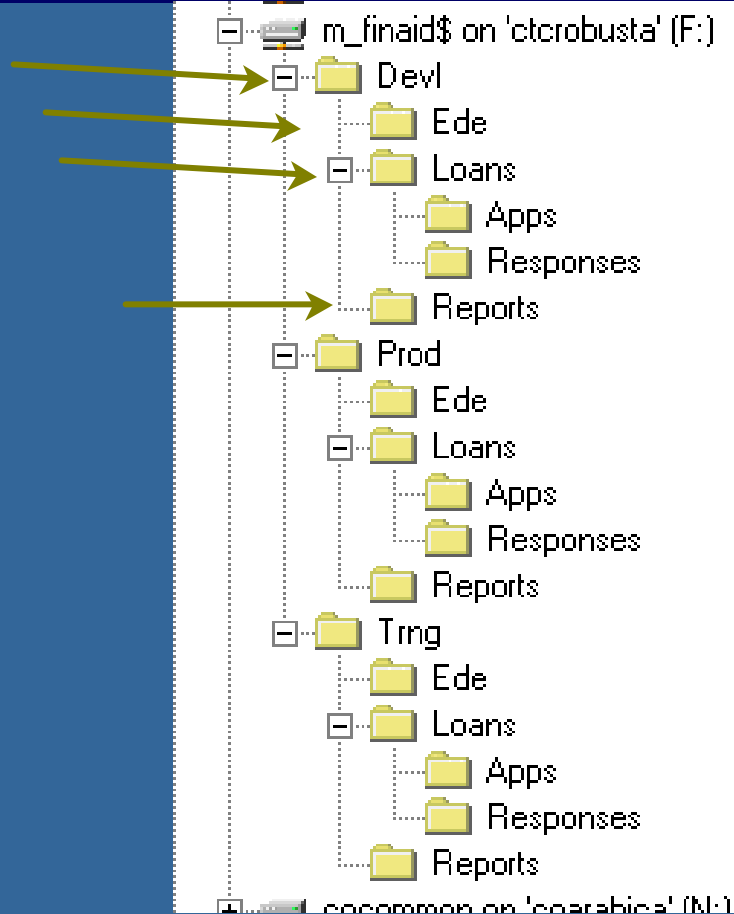
% equals School code



Mapping a Network Drive (cont.)



Mapping a Network Drive (cont.)



RECORD CREATION

- SARA files are downloaded through EdConnect onto a PC in the Financial Aid Office.

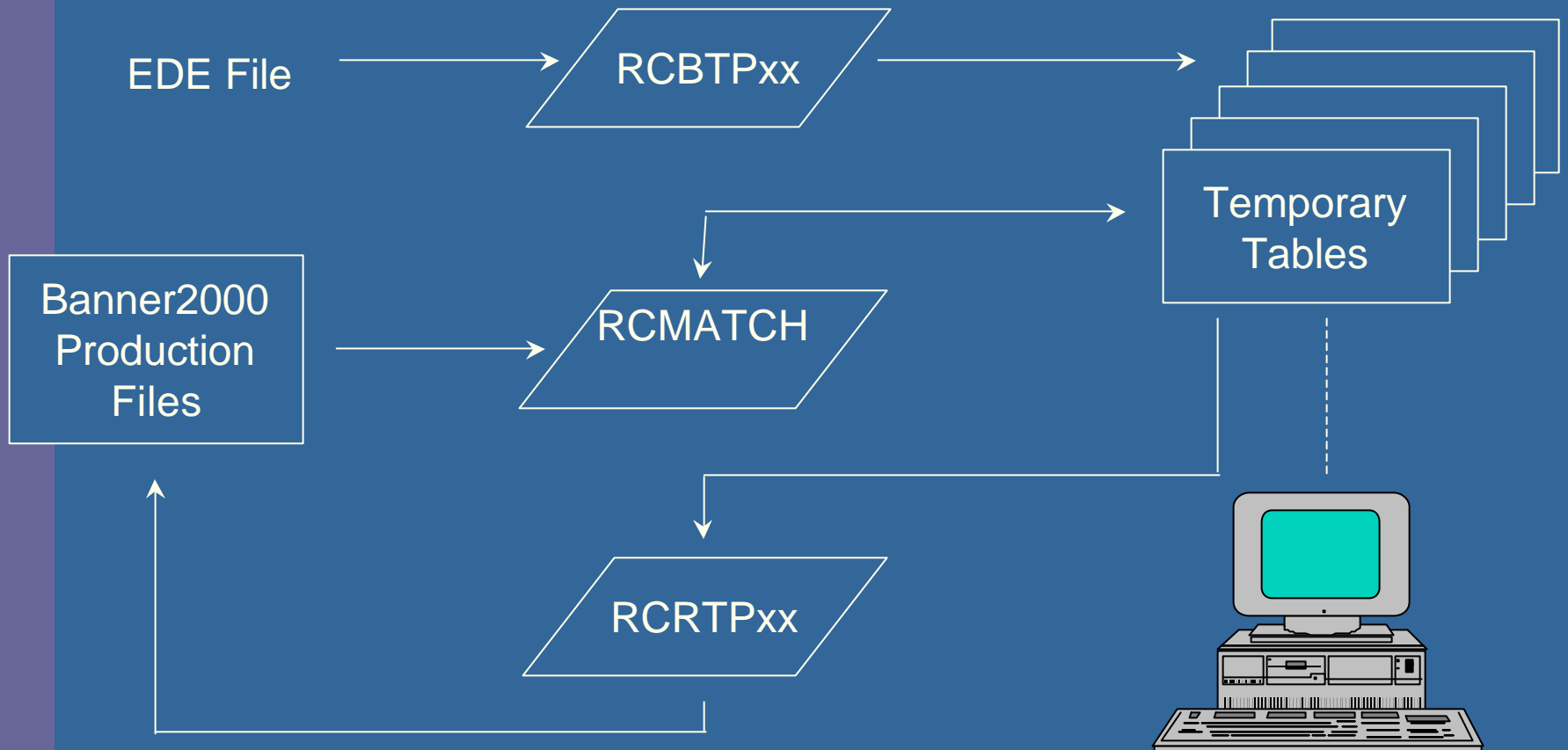
RECORD CREATION

- Via the mapped drive, SARA files are dragged to a specific folder on the NT server at the System Data Center.

RECORD CREATION

- The following automated processes are run nightly on any SARA files found on the server. After these Data Load jobs are run, the SARA files are deleted from the server.

Record Creation Flowchart



RECORD CREATION

- Automated Processes:
- RCBTPXX (Data Load Part I)
 - RCBTPXX puts I SIR records into an Oracle temporary table, not into the Banner database.

RECORD CREATION

- RCMATCH (Data Load Part II)
 - RCMATCH attempts to match the records now in the Oracle temporary table with **General Person** records in the Banner database. Those records that do not match remain in the table. These records are viewed from the suspense form (RCRSUSP).

RECORD CREATION

RCRTPXX (Data Load Part III)

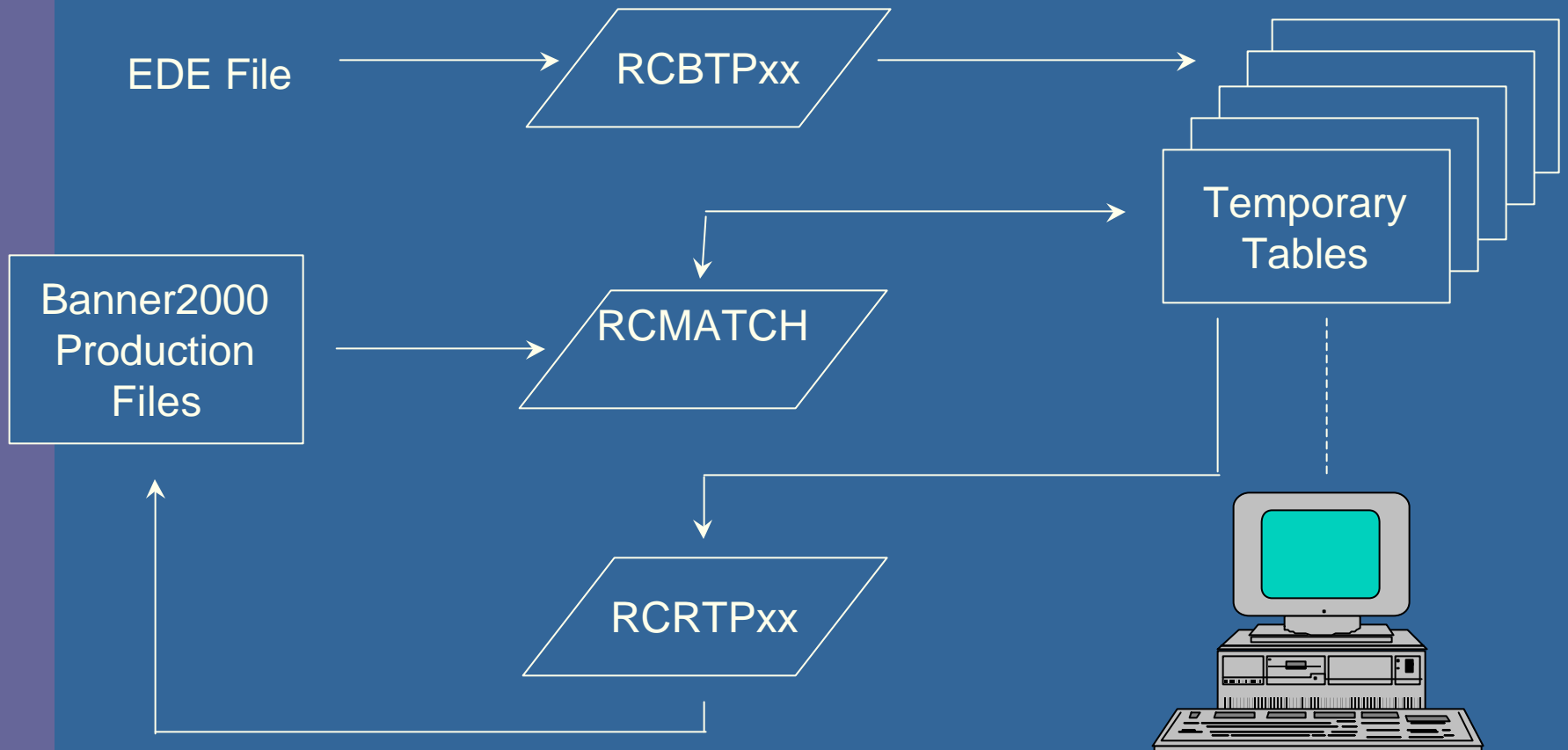
- RCRTPXX posts ISIR data to the Banner financial aid system for students who match successfully in RCMATCH. As this data is brought into Banner, RORSTAT (Financial Aid Person Record) and RCRAPP (Need Analysis) records are created for each student.

Aid Year: 9900 SSN: [REDACTED] ID: [REDACTED] [REDACTED]

App Source	Seq No	Cur RCRAP	ISIR EFC	Tran No	Primary BANNER EFC	Primary INAS EFC	Date Created	Date Updated
EDE	1	Y	2199	01	2199	2199	29-NOV-1999	29-NOV-1999
ISIR	1	N	2199	01	2199	2199	29-NOV-1999	29-NOV-1999

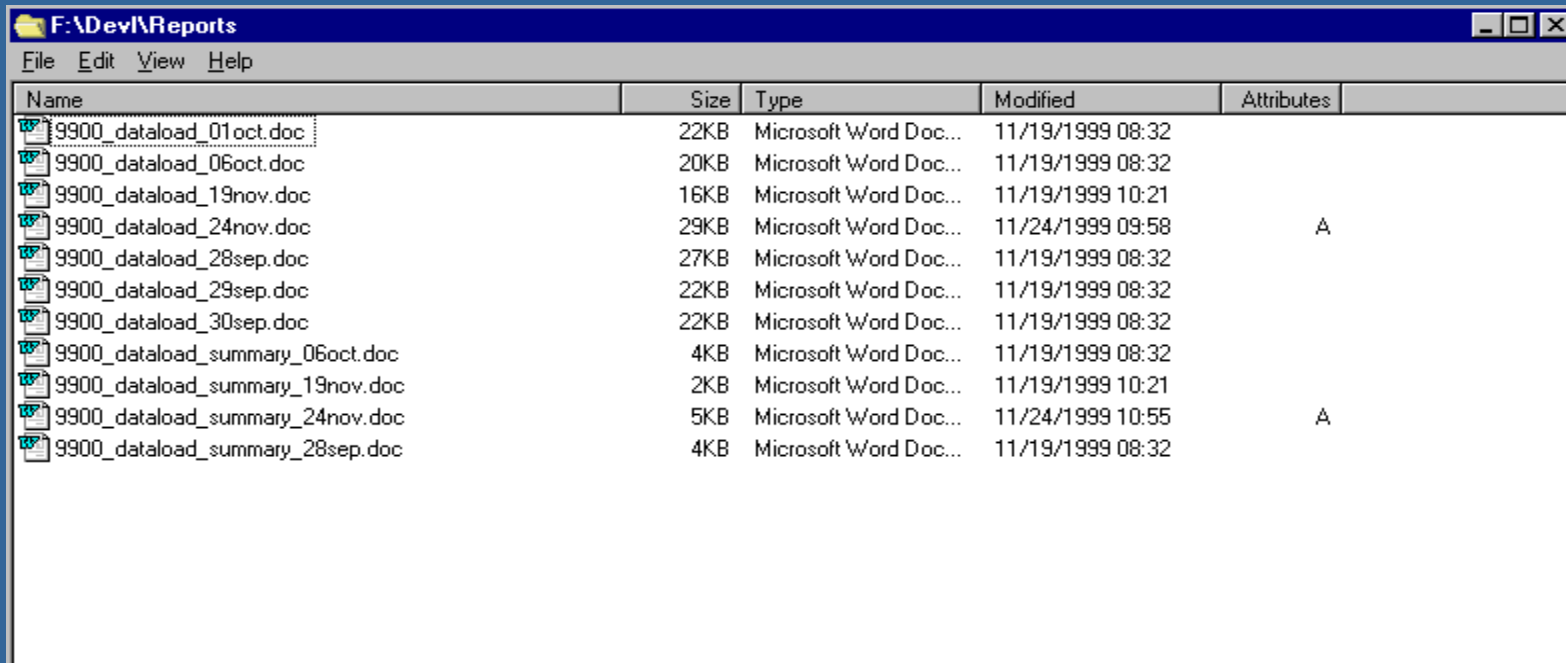
Select Rollback Exit

Record Creation Flowchart



Reports

- Dataload Report
- Dataload Summary Report



The screenshot shows a Windows Explorer window titled "F:\Dev\Reports". The window displays a list of files in a table format. The columns are Name, Size, Type, Modified, and Attributes. The files listed are:

Name	Size	Type	Modified	Attributes
9900_dataload_01oct.doc	22KB	Microsoft Word Doc...	11/19/1999 08:32	
9900_dataload_06oct.doc	20KB	Microsoft Word Doc...	11/19/1999 08:32	
9900_dataload_19nov.doc	16KB	Microsoft Word Doc...	11/19/1999 10:21	
9900_dataload_24nov.doc	29KB	Microsoft Word Doc...	11/24/1999 09:58	A
9900_dataload_28sep.doc	27KB	Microsoft Word Doc...	11/19/1999 08:32	
9900_dataload_29sep.doc	22KB	Microsoft Word Doc...	11/19/1999 08:32	
9900_dataload_30sep.doc	22KB	Microsoft Word Doc...	11/19/1999 08:32	
9900_dataload_summary_06oct.doc	4KB	Microsoft Word Doc...	11/19/1999 08:32	
9900_dataload_summary_19nov.doc	2KB	Microsoft Word Doc...	11/19/1999 10:21	
9900_dataload_summary_24nov.doc	5KB	Microsoft Word Doc...	11/24/1999 10:55	A
9900_dataload_summary_28sep.doc	4KB	Microsoft Word Doc...	11/19/1999 08:32	

RECORD LOAD

- RCRSUSP

- This form views records that did not match during RCMATCH (Data Load Part II).
- This form should be maintained at least weekly during peak processing times.

RECORD LOAD

- RCRSUSP Codes
 - **"S" Suspense** Record is held in suspense when a conflict exists between I SIR data and General Person data.

RECORD CREATION

- RCRSUSP Codes (cont)
 - **"H" Hold** Hold status indicates that this record could not be matched with records currently in the Banner database. This usually indicates a new record.

RECORD CREATION

- RCRSUSP Codes (cont)
 - **“D” Duplicate** This indicates that a record with the same information already exists in the temporary table.

RECORD CREATION

- RCRSUSP Codes (cont)
 - (*) This is an error code that indicates a technical problem with the record such as a duplicate PI DM. This can only be resolved by the Duplicate ID Resolution Team Leader on your campus.

RCRSUSP FORM – Record Resolution

1. Grouping Records for Review

- Enter the Data Source (EDE) in the Keyblock.
- Access the Identification Block. Information in the temporary table appears in this block.
- Enter a query (F7)
 - Enter “S” in the current Status Block for Suspended Records
 - Enter “D” in the current Status Block for Duplicate Records
- Execute the query (F8) to identify the records.
- Use down arrow to move through the records.

2. Matching Suspended “S” Temporary Records to BANNER Records

Records are put into an “S” status when the ISIR data and Banner Production data share some data but are not a true match.

- Complete Step 1 for “S” records
- Access the production block. Note that the ID, Social Security Number and Last Name default from the top block.
- Determine from the error code the data that is to be used for matching this record.

- Blank out extra defaulted data and execute a query to find a possible match. (Ex. if ID matches, blank out SSN and last name and execute query on ID only. If Last Name matches, blank out ID and SSN and execute query on Last Name only.)
- Arrow down through the resulting record(s) to see if a match exists.

When a match is identified, return to the Identification block.

- Delete existing ID and enter Banner Production ID
- Enter "M" (match) in the Override field.
- Save

3. Resolving Duplicate "D" Temporary Records

This code indicates that 2 or more records exist in the temporary table with duplicate information. They may or may not have matching records in the Banner Production Database.

- Complete Step 1 for "D" Records
- Access Identification Block. This is your first "D" record.
- Arrow down to view duplicate record(s).
- Choose the record you want to try matching against Banner. This would usually be the more recent record.
- Access the Production block. Note that the ID, SSN and/or Last Name default from the top block.
- Delete any defaulted data that does not match and execute a query to find a possible match.

- Arrow down through the resulting record(s) to see if a match exists.

When a match is identified, return to the Identification block.

- Delete existing ID and enter Banner Production ID.
- Enter "M" (match) in the Override field.
- Save

When the nightly data load process is run again, those students that were matched during this process will be brought into Banner.

4. Resolving Records With (*) Error Code

An Error (*) code indicates a technical problem with the record such as a duplicate pidm. These records must be resolved by the Duplicate I.D. Resolution Team Leader at your college.