RECORD CREATION

Table of Contents

General Information
    College Codes .................................................. 1
    Banner Naming Conventions ............................... 2

Set-Up
    RTVINFC ....................................................... 3
    RCINFR ......................................................... 3
    Mapping a Drive ............................................ 4

Record Creation Process
    RCBTPxx ......................................................... 7
    RCMATCH ......................................................... 7
    RCRTPxx ......................................................... 7

Data Load Report/Summary ................................. attachment

RCRSUSP ......................................................... 9-10
RCRSUSP Process .............................................. attachment
RECORD CREATION

SCT. Banner2000™
Financial Aid System

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

All Banner2010 forms (except menus), reports, jobs, and tables have seven-character names with the following structure:

<table>
<thead>
<tr>
<th>Position Locations</th>
<th>R</th>
<th>O</th>
<th>A</th>
<th>I</th>
<th>N</th>
<th>S</th>
<th>T</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Position 1**
- Identifies the system owning the form, report, process, or table.

- A: Academic/Development
- B: Business
- C: Court
- D: Cash Drawer
- F: Finance
- G: General
- K: Work Management
- L: Occupational Tax and License
- N: Position Control
- O: Customer Contact
- P: Human Resources/Personnel
- Q: Electronic Work Queue

**Position 2**
- Identifies the application module owning the form, report, process, or table.

- B: Budgeting
- C: Record Creation
- E: Electronic Data Exchange (EDX)
- F: Purchasing
- H: History and Transcripts
- J: Student Employment
- L: Logging
- N: Need Analysis
- O: Common Functions
- P: Packaging and Debarments
- R: Requirements Tracking
- S: Student System Shared Data
- T: Validation Form/Table

**Position 3**
- Identifies the type of form, report, process, or table.

- A: Application form
- B: Basic table
- I: Inquiry form
- P: Process report
- R: Rule form
- T: Temporary table

**Position 4-7**
- Identify a unique, four-character name for the form, report, process, or table.

### Positions 4-7

- W: Reserved for client-developed forms or modules used within a Banner2010 application character in position 1 not equal to W, Y, or Z

### Examples

- **RCAGINST**: R = Financial Aid, C = Common Functions, A = Application, G = Institutional Options
- **RBSPCMP**: R = Financial Aid, B = Budgeting, S = Report, C = Budget Component
- **NTVDBTYF**: R = Financial Aid, V = Validation, DB = Budget Type
SET-UP

- RTVINFC - identifies ISIR as source document from EDE download

- RCRINFR - specifies matching requirements for incoming ISIRS

- Map a drive to the NT server at the System Data Center
**SET-UP (cont.)**

**RTVINFC** - identifies ISIR as source document from EDE download

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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<tbody>
<tr>
<td>RTVINFC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACT.CSS</td>
<td>ACT Tape in CSS format</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AFSA</td>
<td>AFSA Tape</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>EDE</td>
<td>EDE Record</td>
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<td></td>
</tr>
<tr>
<td>GAP.CSS</td>
<td>GAPFAS Tape in CSS Format</td>
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<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>SIR</td>
<td>ISIR Record from CPS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manual</td>
<td>Manual Entry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FHEAA</td>
<td>FHEAA Tape</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIM</td>
<td>For online N/A simulation only</td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>USAF</td>
<td>USAF Tape</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>USAFACT</td>
<td>USAF Tape in ACT format</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USAFCSS</td>
<td>USAF Tape in CSS format</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select | Rollback | Save | Exit
SET-UP (cont.)

RCRINFR - specifies matching requirements for incoming ISIRS
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

Map Network Drive

Drive: S:
Path: 
Connect As: 
Reconnect at Logon

Shared Directories:
- Microsoft Windows Network
- COMMTECH
- CTCRD
- CTCE\C01
- CTCE\W
- CTCK0NA
- CTCLATTE
- CTCPERK
- CTCR0BUSTA
- LIPTON
- FLATBUSH_LAB
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.
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

- EDE File
- RCBTPxx
- RCMATCH
- RCRTPxx
- Temporary Tables
- Banner2000 Production Files
RECORD CREATION

- Automated Processes:

- RCBTPXX (Data Load Part I)
  - RCBTPXX puts ISIR 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.
<table>
<thead>
<tr>
<th>App Source</th>
<th>Seq No</th>
<th>Cur RCRAP</th>
<th>ISIR EFC</th>
<th>Tran No</th>
<th>BANNER EFC</th>
<th>INAS EFC</th>
<th>Date Created</th>
<th>Date Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDE</td>
<td>1</td>
<td>Y</td>
<td>2199</td>
<td>01</td>
<td>2199</td>
<td>2199</td>
<td>29-NOV-1999</td>
<td>29-NOV-1999</td>
</tr>
<tr>
<td>ISIR</td>
<td>1</td>
<td>N</td>
<td>2199</td>
<td>01</td>
<td>2199</td>
<td>2199</td>
<td>29-NOV-1999</td>
<td>29-NOV-1999</td>
</tr>
</tbody>
</table>
Record Creation Flowchart

EDE File → RCBTPxx → RCMATCH

Temporary Tables

Banner2000 Production Files → RCRTPxx
Reports

- Dataload Report
- Dataload Summary Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Type</th>
<th>Modified</th>
<th>Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>9900_dataload_01oct.doc</td>
<td>22KB</td>
<td>Microsoft Word Doc...</td>
<td>11/19/1999 08:32</td>
<td></td>
</tr>
<tr>
<td>9900_dataload_06oct.doc</td>
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</tr>
<tr>
<td>9900_dataload_13nov.doc</td>
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</tr>
<tr>
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<tr>
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<td>Microsoft Word Doc...</td>
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<tr>
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<td>11/19/1999 08:32</td>
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<tr>
<td>9900_dataload_summary_06oct.doc</td>
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<td>9900_dataload_summary_19nov.doc</td>
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<td>Microsoft Word Doc...</td>
<td>11/19/1999 10:21</td>
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<td>Microsoft Word Doc...</td>
<td>11/19/1999 08:32</td>
<td></td>
</tr>
</tbody>
</table>
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 ISIR 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.
- “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 PIDM. This can only be resolved by the Duplicate ID Resolution Team Leader on your campus.
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.