

Using Release Banner Hold Batch Process

Georgia Enhanced Banner Student and Financial Aid Systems User Documentation

Version 8.0

**Office of Information and
Instructional Technology**

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Using Release Banner Hold Batch Process

Introduction to Release Banner Hold Batch Process

Purpose	The Release of Banner Hold Batch Process will be used for releasing Banner holds based on population selection. Institutionally defined population selection will denote which student records will be updated. Currently, institutions assign hold codes to an individual student on the <i>Hold Information</i> form (SOAHOLD) and must manually release each individual student hold(s) using the same form. The new enhancement will be available as an optional release to the baseline Georgia modification product.
Target Audience	Administrative office that is responsible for monitoring and maintaining student hold codes.
Purpose and Scope of Document	<p>This document explains how to use the Release Banner Hold Batch Process process.</p> <p>This chapter includes the following topics:</p> <ul style="list-style-type: none">• Process Flow• Implementing Release Banner Hold Batch Process
Graphics	<p>Graphic cues used in this document assist with labeling of steps and items that are particularly important.</p> <p> Steps for recovery or support.</p> <p> For additional information, see references.</p> <p> Exercise caution.</p> <p> Warning: an error here is critical.</p>
References	<p>For information about the baseline product, see <i>Using SCT Banner User Manual for Accounts Receivable, Financial Aid, and Student</i>.</p> <p></p>

Support



For additional OIIT resources and support, contact the OIIT Helpdesk:

- Web support request self-service:
http://www.usg.edu/customer_services
- E-mail: Helpdesk@usg.edu

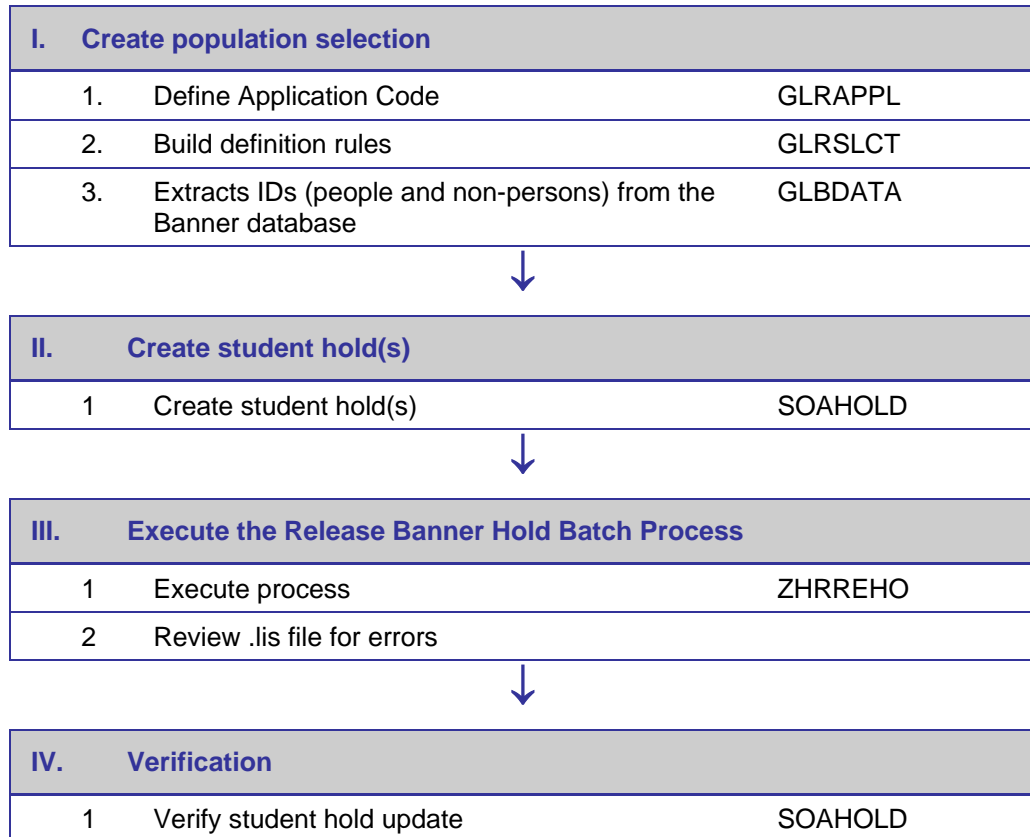
For emergency, business interruptions, or production down situations, call the OIIT Helpdesk immediately

- 706-583-2001
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Release Banner Hold Batch Process Flow

Description The Release of Banner Hold Batch Process (ZHRREHO) releases Banner hold code(s) based on an institutional defined population selection. The process will run in audit or update mode and allow institutions to update the individual students 'END DATE' on the Hold Information form (SOAHOLD).

Overview of Release Banner Hold Batch Process Complete the following steps to implement and execute Release Banner Hold Batch Process information into the Banner Student module.



Implementing Release Banner Hold Batch Process

I. Create population selection

Overview

The Population Selection module lets you identify and group entities in the database (for example, people, vendors, and organizations). You can define selection criteria to identify and extract a subset of these entities to use in Banner reports, processes, and letters.

1. Define Application Code

Application Definition Rules Form (GLRAPPL)

Use this form to define and maintain an application. An application is a functional area with similar characteristics that can be applied to population selections, populations, and variables.

The screenshot shows a web-based form titled "Application Definition Rules - GLRAPPL 8.0". The form includes the following fields and sections:

- Application:** A dropdown menu with "STUDENTS" selected.
- Description:** A text input field containing "Students".
- System:** A dropdown menu with "S" selected.
- Delete All:** A checkbox that is currently unchecked.
- Application Level Rules:** A table with columns: '(', Data Element, Operator, Value, ')', and AND / OR. The first row is populated with "SPRIDEN_LAST_NAME", "=", and "'Flintstone'".

'(Data Element	Operator	Value)'	AND / OR
	SPRIDEN_LAST_NAME	=	'Flintstone'		

2. Build definition rules

Population Selection Definition Rules Form (GLRSLCT)

Use this form to define, maintain, and copy a population selection. A population selection is a set of rules used to select IDs from the Banner database for reports, processes, and letters.

The screenshot shows a web-based form titled "Population Selection Definition Rules - GLRSLCT 8.2".

- Application:** STUDENTS (dropdown)
- Selection ID:** TERM (dropdown)
- Creator ID:** JBROZ (text input)

Selection Description: A term of eligible students. Includes checkboxes for Manual, Locked, Delete, and Application Level Rules Exist (checked).

Definition:

- Select:** SFBETRM_PIDM
- From:** SFBETRM

Rules Table:

'('	Data Element	Operator	Value)'	AND / OR
	SFBETRM_ESTS_CODE	=	'EL'		AND
	SFBETRM_TERM_CODE	=	'&Term'		AND

**3. Extracts IDs
 (people and non-
 persons) from
 the Banner
 database**

Population Selection Extract Process (GLBDATA)

This process selects a population based on the rules entered on the Population Selection Definition Rules Form (GLRSLCT). It can also create a population based on union, intersection, or difference of the rules in two existing population selections.

The screenshot shows a software window titled "Process Submission Controls - GIAPCTL 8.2". At the top, it displays "Process: GLBDATA" and "Population Selection Extract" in a dropdown menu, along with a "Parameter Set:" dropdown. Below this is a "Printer Control" section with fields for "Printer:", "Special Print:", "Lines: 55", and "Submit Time:". The main section is "Parameter Values", which contains a table with two columns: "Parameters" and "Values".

Number	Parameters	Values
01	Selection Identifier 1	TERM
02	Selection Identifier 2	
03	New Selection Identifier	
04	Description for new selection	
05	Union/Intersection/Minus	
06	Application Code	STUDENTS
07	Creator ID of Selection ID	JBROZ
08	Detail Execution Report	S

Below the table, it specifies "LENGTH: 30 TYPE: Character O/R: Optional M/S: Single" and includes a note: "Enter a description when parameter 3 is entered." At the bottom, the "Submission" section contains a checkbox for "Save Parameter Set as", fields for "Name:" and "Description:", and radio buttons for "Hold" and "Submit".

II. Create student hold(s)

1. Create student hold(s)

Hold Information Form (SOAHOLD)

Use the Hold Information form to assign holds to a person or entity.

Hold Information SOAHOLD 8.2

ID: 100000001 Spike Witwicky

Hold Details

Hold Type: CM	CPC-Mathematics	Reason:		Release Indicator:	DBROZ
Amount:		From: 20-OCT-2009	To: 31-DEC-2009	Origination Code:	
Hold Type: BO	Business Office Hold-5254	Reason: Parking Fine		Release Indicator: DBROZ	
Amount: 10.00		From: 20-OCT-2009	To: 31-DEC-2009	Origination Code:	
Hold Type:		Reason:		Release Indicator:	
Amount:		From:	To:	Origination Code:	
Hold Type:		Reason:		Release Indicator:	
Amount:		From:	To:	Origination Code:	
Hold Type:		Reason:		Release Indicator:	
Amount:		From:	To:	Origination Code:	

III. Execute the Release Banner Hold Batch Process

1. Execute the Release Banner Hold Batch Process

Release Banner Hold Batch Process (ZHRREHO)

Use the Release Banner Hold Batch Process to update student holds based on an institutional defined population selection.

The screenshot shows the 'Process Submission Controls' window for the process ZHRREHO. The window title is 'Process Submission Controls: GIAPCTL 8.2'. It contains several sections:

- Process:** ZHRREHO (dropdown), Rel Banner Hold Batch Process (text field), Parameter Set: (dropdown)
- Printer Control:** Printer: (dropdown), Special Print: (text field), Lines: (checkbox), Submit Time: (text field)
- Parameter Values:** A table with columns for Number, Parameters, and Values.

Number	Parameters	Values
01	Run Mode	A
02	Hold Type Code	CM
03	Hold End Date	20-OCT-2009
04	Selection Identifier	TERM
05	Application Code	STUDENT
06	Creator ID	JBROZ
07	User ID	JBROZ

LENGTH: 30 TYPE: Character O/R; Required M/S: Single
Enter User ID for population selection created.
- Submission:** Save Parameter Set as (checkbox), Name: (text field), Description: (text field), Hold (radio), Submit (radio)

2. Review .lis file for errors

The .lis file will contain a list of all students processed, the individual the ID, name, hold code, release indicator, hold code end date and new hold code end date for all records.

Sample .lis file with no errors:

```

10-20-2009 15:45:19                               OIIT                               PAGE: 1
                                           Release of Banner Hold Batch Process   ZHRREHO 8.0   ID

ID      Name      Hold  Rel   End Date   New End Date
090098278 Jensen, Angela BO   Y   DEC-31-2099 User not allowed to release hold.
001005983 Jensen, Bobby   BO   N   DEC-31-2099 20-OCT-2009
090152969 Jensen, Boubacar BO  Y   DEC-31-2099 User not allowed to release hold.
090149641 Jensen, Christina BO  Y   DEC-31-2099 User not allowed to release hold.
090125121 Jensen, Darryl  BO  Y   DEC-31-2099 User not allowed to release hold.
001000528 Jensen, Henry   BO  Y   DEC-31-2099 User not allowed to release hold.
090057758 Jensen, Jason   BO  Y   DEC-31-2099 User not allowed to release hold.
090149630 Jensen, Jeremy  BO  Y   DEC-31-2099 User not allowed to release hold.
090105253 Jensen, Kim     BO  Y   DEC-31-2099 User not allowed to release hold.
090140210 Jensen, Lindsey BO  Y   DEC-31-2099 User not allowed to release hold.
090033319 Jensen, Mario   BO  Y   DEC-31-2099 User not allowed to release hold.
090101853 Jensen, Nanette BO  Y   DEC-31-2099 User not allowed to release hold.
090108561 Jensen, Oghenemine BO Y   DEC-31-2099 User not allowed to release hold.
090132737 Jensen, Rapheal BO  Y   DEC-31-2099 User not allowed to release hold.
090137868 Jensen, Roderick BO  N   DEC-31-2099 20-OCT-2009
090060045 Jensen, Stephanie BO  Y   DEC-31-2099 User not allowed to release hold.
090084041 Jensen, Tammy   BO  Y   DEC-31-2099 User not allowed to release hold.
001006075 Jensen, Verius  BO  Y   DEC-31-2099 User not allowed to release hold.
090107776 Jensen, Youbertha BO  Y   DEC-31-2099 User not allowed to release hold.

10-20-2009 15:45:19                               OIIT                               PAGE: 2
                                           Release of Banner Hold Batch Process   ZHRREHO 8.0   ID

* * * REPORT CONTROL INFORMATION * * *

Parameter Description      Parameter Value(s)
Run Mode                   A
Hold Type Code             BO
Hold End Date              20-OCT-2009
Selection Identifier       ALL_STUDENTS
Application Code           STUDENT
Creator ID                 JBROZ
User ID                    JBROZ

Record Count               19

ZHRREHO 8.0 completed successfully

```

If any record in the file generates an error, the student hold code will not be updated.

An Error/Warning message will be displayed next to the student record when trying to update a hold code that has a release indicator option checked and the Banner ID doesn't match on SOAHOLD.

In the next example, the Banner ID for the 'AH' hold code does not match the User ID for the Banner user that executed the ZHRREHO process.

Sample of Hold Information form (SOAHOLD) showing Release Indicator option checked:

Sample .lis file with Error/Warning message:

```

10-20-2009 15:45:19                OIIT                PAGE: 1
                                Release of Banner Hold Batch Process        ZHRREHO 8.0  ID

ID      Name                    Hold  Rel   End Date   New End Date
090098278  Jensen, Angela             BO    Y    DEC-31-2099   User not allowed to release hold.
001005983  Jensen, Bobby              BO    N    DEC-31-2099   ** *** **
090152969  Jensen, Boubacar          BO    Y    DEC-31-2099   User not allowed to release hold.
090149641  Jensen, Christina         BO    Y    DEC-31-2099   User not allowed to release hold.
090125121  Jensen, Darryl            BO    Y    DEC-31-2099   User not allowed to release hold.
001000528  Jensen, Henry              BO    Y    DEC-31-2099   User not allowed to release hold.
090057758  Jensen, Jason              BO    Y    DEC-31-2099   User not allowed to release hold.
090149630  Jensen, Jeremy            BO    Y    DEC-31-2099   User not allowed to release hold.
090105253  Jensen, Kim                BO    Y    DEC-31-2099   User not allowed to release hold.
090140210  Jensen, Lindsey           BO    Y    DEC-31-2099   User not allowed to release hold.
090033319  Jensen, Mario              BO    Y    DEC-31-2099   User not allowed to release hold.
090101853  Jensen, Nanette           BO    Y    DEC-31-2099   User not allowed to release hold.
090108561  Jensen, Oghenemine        BO    Y    DEC-31-2099   User not allowed to release hold.
090132737  Jensen, Rapheal           BO    Y    DEC-31-2099   User not allowed to release hold.
090137868  Jensen, Roderick          BO    N    DEC-31-2099   20-OCT-2009
090060045  Jensen, Stephanie         BO    Y    DEC-31-2099   User not allowed to release hold.
090084041  Jensen, Tammy             BO    Y    DEC-31-2099   User not allowed to release hold.
001006075  Jensen, Verius            BO    Y    DEC-31-2099   User not allowed to release hold.
090107776  Jensen, Youbertha         BO    Y    DEC-31-2099   User not allowed to release hold.

10-20-2009 15:45:19                OIIT                PAGE: 2
                                Release of Banner Hold Batch Process        ZHRREHO 8.0  ID

* * * REPORT CONTROL INFORMATION * * *

Parameter Description              Parameter Value(s)

Run Mode                          A
Hold Type Code                     BO
Hold End Date                       20-OCT-2009
Selection Identifier                ALL STUDENTS
Application Code                    STUDENT
Creator ID                          JBROZ
User ID                             JBROZ

Record Count                        19

ZHRREHO 8.0 completed successfully
    
```

IV. Verification

Verification

Hold Information Form (SOAHOLD)

Use the Hold Information form to verify student 'end date' has been updated.

The screenshot displays the 'Hold Information SOAHOLD 8.2' application window. At the top, the student ID is 001005983 and the name is Bobby Jensen. The 'Hold Details' section lists several holds:

Hold Type	Amount	From	To	Origination Code	Code
BO Business Office 404-756-4442	30.00	22-JAN-2007	31-DEC-2099		BOHOLD
AA Academic Advisor		15-JAN-2007	31-DEC-2099		KDICKENS
BO Business Office 404-756-4442		05-MAR-1998	12-MAR-2007		BOHOLD

Appendix A: Document History

This section details the history of the document and updates made for each modification.

Release and Date	Page	Update Description
Georgia Enhancements 7.13.1, June 30, 2008	NA	Original
Georgia Enhancements 8.0, March 31, 2010	All	Updates for the 8.0 release

Appendix B: Process Flow

Release of Banner Holds Process

