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

March 2010

This page left blank to facilitate front/back printing.

Table of Contents

This page left blank to facilitate front/back printing.

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 *Hold Information* 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

This document explains how to use the Release Banner Hold Batch Process process.

This chapter includes the following topics:

- Process Flow

- Implementing Release Banner Hold Batch Process

Graphics

Graphic cues used in this document assist with labeling of steps and items that are particularly important.

Steps for recovery or support.

For additional information, see references.

Exercise caution.

Warning: an error here is critical.

References

For information about the baseline product, see *Using SCT Banner User Manual for Accounts Receivable, Financial Aid, and Student.*

Support

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

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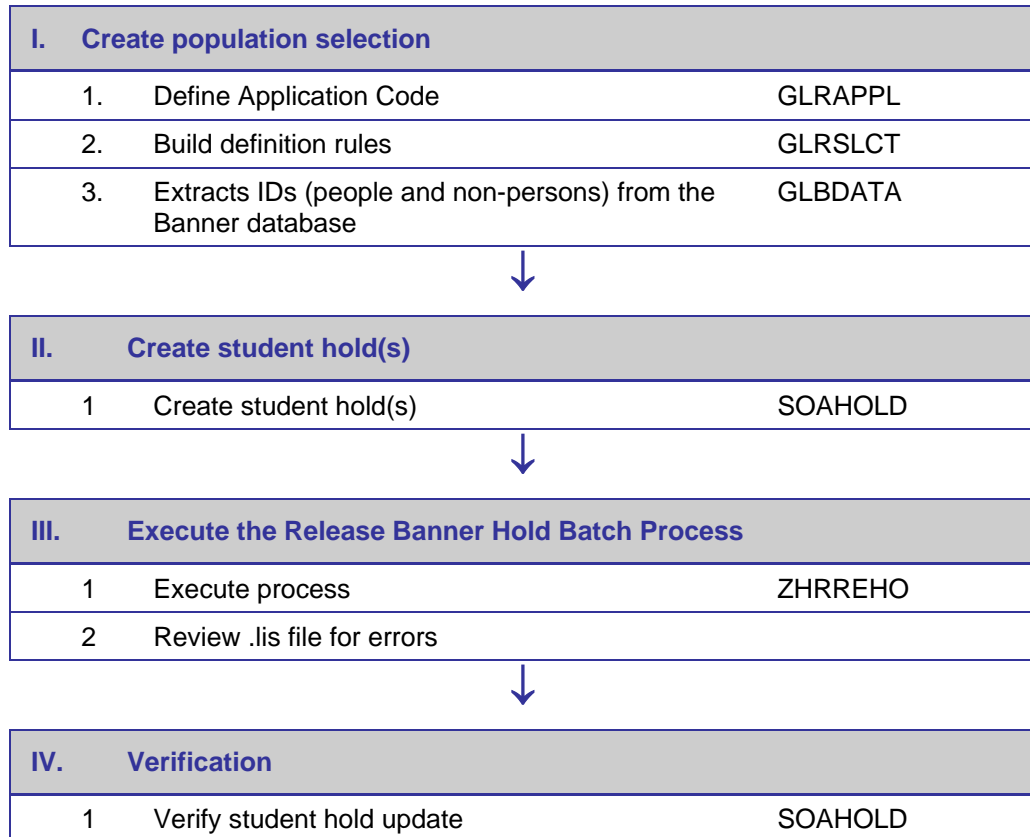- E-mail: Helpdesk@usg.edu

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

- 706-583-2001
- Toll free within Georgia: 1-888-875-3697

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.

I.	Create population selection	
1.	Define Application Code	GLRAPPL
2.	Build definition rules	GLRSLCT
3.	Extracts IDs (people and non-persons) from the Banner database	GLBDATA

↓

II.	Create student hold(s)	
1	Create student hold(s)	SOAHOLD

↓

III.	Execute the Release Banner Hold Batch Process	
1	Execute process	ZHRREHO
2	Review .lis file for errors	

↓

IV.	Verification	
1	Verify student hold update	SOAHOLD

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.

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.

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.

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.

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.

.

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:

IV. Verification

Verification

Hold Information Form (SOAHOLD)

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

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

```
┌─────────────────┐
│     Create      │
│  Banner holds   │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│     Create      │
│   Population    │
│   Selection     │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│  Run Release    │
│   of Banner     │
│     Holds       │
└─────────────────┘
```