Using Release Banner Hold Batch Process

Georgia Enhanced Banner Student and Financial Aid Systems User Documentation

Version 7.13.1

Office of Information and Instructional Technology

June 2008
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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 Hold Information form (SOAHLT) 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.
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).

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

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<td>1. Create student hold(s)</td>
<td>SOAHOLD</td>
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<th>III. Execute the Release Banner Hold Batch Process</th>
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<td>1. Execute process</td>
<td>ZHRREHO</td>
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<td>2. Review .lis file for errors</td>
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<tr>
<th>IV. Verification</th>
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<tr>
<td>1. Verify student hold update</td>
<td>SOAHOLD</td>
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Implementing Release Banner Hold Batch Process

1. 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 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:

```plaintext
ID        Name       Hold     Rel   End Date    New End Date
001112346  Jensen, adding last    AB    N  DEC-31-2009  JUN-01-2009
```

ZHRREHO 7.13.1 completed successfully
Content-type: text/plain; charset=ISO-8859-1
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:

```
06-13-2008 11:54:34 Database PAGE: 1
Release of Banner Hold Batch Process INREHZ 7.13.1

ID   Name    Hold    Rel    End Date      New End Date
00122338  Jensen, David  Y      DEC-31-2009   User not allowed to release hold.
147147147  Spenser, Guy  Y      APR-08-2009

06-13-2008 11:54:34 Database PAGE: 2
Release of Banner Hold Batch Process INREHZ 7.13.1

* * * REPORT CONTROL INFORMATION * * *
Parameter Description                  Parameter Value(s)
Run Mode                               0
Hold Type Code                         AH
Hold End Date                          DF-JUN-2000
Selection Identifier                  CINIV, MANERAL,PopSel
Application Code                      STUDENTS
Creator ID                            CTAYLOR
Driver ID                             TTUCKER
Record Count                          2

INREHZ 7.13.1 completed successfully
Content-type: text/plain; charset=ISO-8859-1
```
IV. 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.

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<th>Page</th>
<th>Update Description</th>
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<td>NA</td>
<td>Original</td>
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