

CREATING A CROSS-REFERENCE TABLE IN BANNER

USER DOCUMENTATION FOR CENTRALIZED TRANSLATION

USING SOAXREF IN BANNER 5.X

**Office of Information and
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INTRODUCTION TO CENTRALIZED TRANSLATION

Several of the University System Office Applications (data collections) use translation tables to convert institutional Banner values to Regents values. In the past, these translations were done on forms that were released to the institutions with certain required values. USO data collections are growing to include more data elements that require more translation. To avoid additional releases and maintenance of multiple translation forms for the data collections, institution-to-Regents code translations for elements introduced in Fall 2001 will occur in a central location on the institution's Banner database. The Financial Aid Reporting System (FARS) is the first system to require these translations. The Student Information Reporting System (SIRS) is the second.

REQUIREMENTS

All Banner institutions are required to create these translations in Banner.

The EDI Label Code values are listed in the Banner Table Reference Sections of the Data Element Dictionaries (DED) for the data collections and must be used in the validation table.

Institutional codes must be translated to the Regents' codes listed in the Valid Codes Sections of the DEDs in the cross-reference tables. These translations occur on the EDI Cross-Reference Rules Form (SOAXREF).

If a translation does not exist, then data are not collected as expected. Therefore, you must translate institutional codes to the Regents' codes in Banner, even if the institutional Banner codes match the required Regents' codes.

PURPOSE OF DOCUMENT

This document provides instructions for creating the Regents' translation tables on the EDI cross-reference tables in Banner for USO data collections. Two Banner forms establish the EDI cross-reference table for both FARS and SIRS.

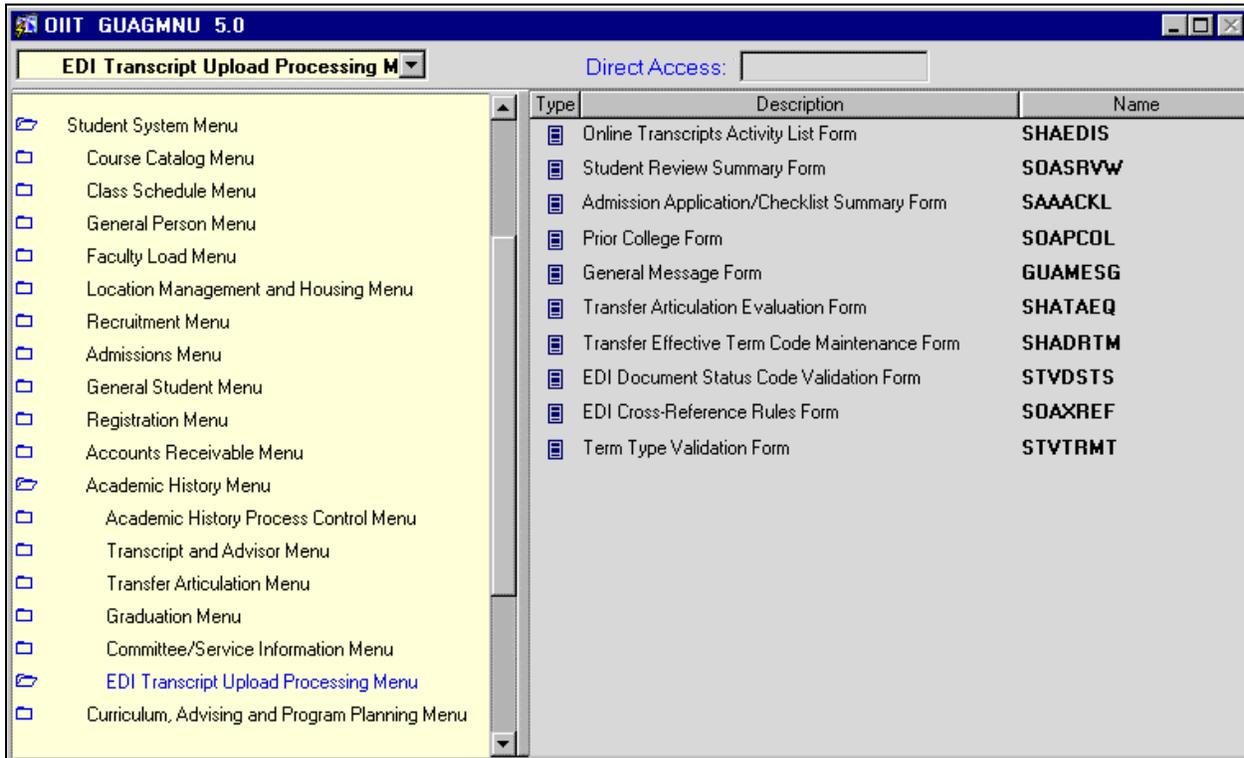
Form Description	Form Name
EDI Verification Label Validation Form	STVXLBL
EDI Cross-Reference Rules Form	SOAXREF

EDI TRANSLATION FORMS

This section contains pictures of the functional/application forms used by the EDI Translation from Banner's Academic History Module. This section also explains the purpose of the forms with a brief description of each data element required to set up the translation.

For complete documentation on the baseline Banner forms, refer to Chapter 14 of the *Banner Student User Manuals*.

EDI TRANSCRIPT UPLOAD PROCESSING MENU



Select the EDI Transcript Upload Processing Menu from the Academic History Menu of the Student Module in Banner. The EDI Translation Forms are a part of the Transcript Upload Processing Menu.

EDI VERIFICATION LABEL VALIDATION FORM (STVXLBL)

EDI Label Code	Description	System Required	Activity Date
RGTDADMT	Regents' Admit Type	<input type="checkbox"/>	07-JUN-2001
RGTCCLAS	Regents' Class Standing	<input type="checkbox"/>	07-JUN-2001
RGTFFAID	Regents' Financial Aid Codes	<input type="checkbox"/>	11-JUN-2001
RGTSLSVL	Regents' Student Level	<input type="checkbox"/>	07-JUN-2001
RGTSSTYP	Regents' Student Type	<input type="checkbox"/>	07-JUN-2001
SBGIQLFR	Educational Inst Qualifier	<input checked="" type="checkbox"/>	25-JAN-1998
STVATYP	Address Type Codes	<input checked="" type="checkbox"/>	25-JAN-1998
STVATYPR	Relatives Address Type Codes	<input checked="" type="checkbox"/>	05-MAR-2001
STVCITZ	Citizenship Type Codes	<input checked="" type="checkbox"/>	25-JAN-1998
STVCNTY	County Codes	<input checked="" type="checkbox"/>	05-MAR-2001
STVDEGC	Degree Level-Degree Code	<input checked="" type="checkbox"/>	25-JAN-1998
STVEGOL	College Program Type Codes	<input checked="" type="checkbox"/>	05-MAR-2001
STVESEL	Eligibility Factor Codes	<input checked="" type="checkbox"/>	05-MAR-2001
STVETHN	Ethnic Type Codes	<input checked="" type="checkbox"/>	05-MAR-2001
STVINTS	Award and Activity Codes	<input checked="" type="checkbox"/>	25-JAN-1998
STVLANGN	Language Name Codes	<input checked="" type="checkbox"/>	25-JAN-1998

The EDI Verification Label Validation Form (STVXLBL) establishes the label codes for the translation. These label codes are listed in the Banner Table Reference Section of the Data Element Dictionaries for the FARS and SIRS data collection systems and must be listed to establish codes on the EDI Cross-Reference Rules Form (SOAXREF).

Note: You cannot delete entries marked “System Required” from the form.

EDI CROSS-REFERENCE RULES FORM (SOAXREF)

The screenshot shows the 'EDI Cross-Reference Rules Form SOAXREF 5.0'. At the top, the 'Cross-Reference Label' is set to 'RGTSTYP' and 'Regents' Student Type'. A 'Copy Table' button is visible. The main area contains a table titled 'EDI Cross-Reference Rules' with the following columns: Label, Qualifier, Value, Std, Web, Banner Value, and Description. The table lists various student types and their corresponding Banner values.

Label	Qualifier	Value	Std	Web	Banner Value	Description
RGTSTYP	B1	B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Y	Post Baccalaureate
RGTSTYP	B2	B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	P	Post Baccalaureate
RGTSTYP	C1	C	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C	Continuing or Returning Student
RGTSTYP	C2	C	<input checked="" type="checkbox"/>	<input type="checkbox"/>	A	Continuing or Returning Student
RGTSTYP		A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	T	Auditor
RGTSTYP		F	<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	New Freshman
RGTSTYP		G	<input checked="" type="checkbox"/>	<input type="checkbox"/>	G	New Graduate Student
RGTSTYP		J	<input checked="" type="checkbox"/>	<input type="checkbox"/>	J	Joint Enrollment
RGTSTYP		N	<input checked="" type="checkbox"/>	<input type="checkbox"/>	M	Non-Degree
RGTSTYP		P	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Q	New First-Professional
RGTSTYP		T	<input checked="" type="checkbox"/>	<input type="checkbox"/>	D	New Undergraduate Transfer
RGTSTYP		X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	R	Transient
			<input type="checkbox"/>	<input type="checkbox"/>		

Use the EDI Cross-Reference Rules Form (SOAXREF) to translate the EDI value to the Banner value. For USO data collections, this form establishes the translation of institutional Banner values to standard Regents' values.

The **Cross Reference Label** in the key block contains the label previously entered on the EDI Verification Label Validation Form, i.e., the label listed in the data collection system's DED.

The **EDI Label** field in the EDI Cross Reference Rules block should match the Cross Reference Label in the key block.

You must use the **EDI Qualifier** when your institution has more than one institutional Banner value for the same EDI Value/Regents' value. Use a qualifier when you need a 'many-to-one' translation. For example, for the SIRS collection, both the institutional values for the Student Types of C-Continuing and A-Returning map to the Regents' EDI Value of C-Continuing or Returning Student. The qualifiers C1 and C2 are used to map both institutional values to the Regents' EDI Value of C.

For qualifier entries, use the EDI Value with an appended number to aid in sorting the values entered on the form. You may need to abbreviate the EDI Value to conform to the field's size.

The **EDI Value** field contains the Regents' value for the translation. These codes are listed in the Valid Codes Sections of the DED.

The **Std** indicator is the EDI Standard Field indicator that is used to specify whether the associated EDI value is a "standard" EDI value or whether it is not an EDI value but one required for Banner processing. The default value is checked.

The **Web** indicator is the Web Display indicator that is used to specify the values for a label that will display in the Banner Web pages. This box is not used for data collection.

The **Banner Value** field contains the institutional value for the translation for codes in use at the institution.

The **Description** field contains a brief description of the translation. This field is optional, but OIIT recommends that you complete it with the name of the Regents' value being translated.

PROCEDURAL STEPS TO CREATE EDI TRANSLATIONS

Set up valid EDI codes on STVXLBL

1. To set up valid Regents' codes in Banner, complete the following steps:
 - Access the EDI Verification Label Validation Form (STVXLBL)
 - Enter the EDI Label Code for the element as listed in the Data Element Dictionary (DED).
 - Enter the Description for each element.

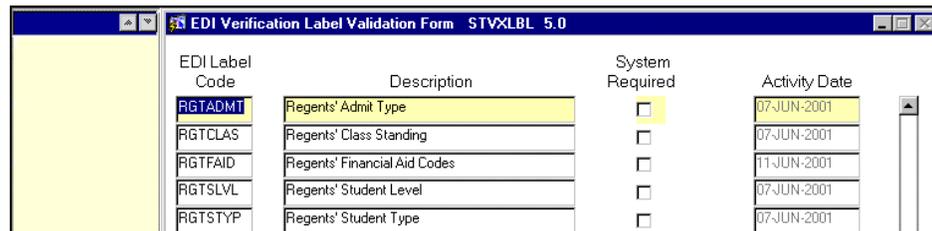
RECOMMENDATION: Use the element title as listed in the DED for easier reference.

- Save the entries into the form.

NOTE: The Activity Date will default to the current date.

Verify codes

2. Verify the codes that were entered.



EDI Label Code	Description	System Required	Activity Date
RGTADM1	Regents' Admit Type	<input type="checkbox"/>	07-JUN-2001
RGTCCLAS	Regents' Class Standing	<input type="checkbox"/>	07-JUN-2001
RGTFEID	Regents' Financial Aid Codes	<input type="checkbox"/>	11-JUN-2001
RGTSVLV	Regents' Student Level	<input type="checkbox"/>	07-JUN-2001
RGTSYYP	Regents' Student Type	<input type="checkbox"/>	07-JUN-2001

Translate institution codes to Regents' codes

3. To establish the translation of institutional codes to Regents' codes, complete the following steps:

- Access the EDI Cross-Reference Rules Form (SOAXREF)
- Double-click in the Cross-Reference Label field to display a list of EDI Label Codes (or Regents' codes) previously entered on STVXLBL.
- Select the label from the list and click OK.
- Go to the Next Block, the EDI Cross Reference Rules block.
NOTE: The EDI Label Code field should auto-populate with the Label from the previous block.

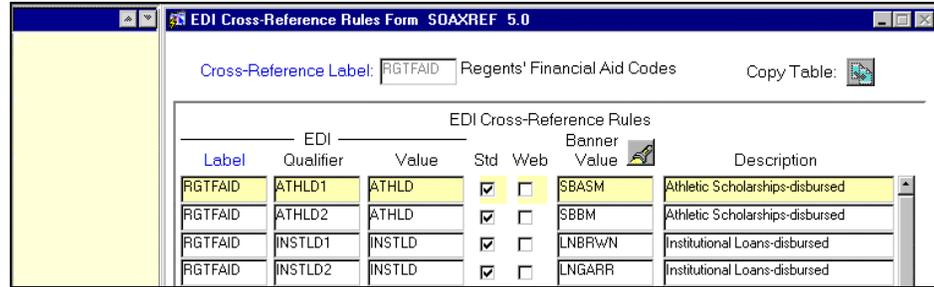
- Enter a Qualifier (if needed).

NOTE: Use Qualifiers when multiple institutional Banner codes 'map' to one Regents' code. For sorting purposes, the Qualifier should be named the same as the Value with an appended number.

- Enter the Regents' value as listed in the DED in the Value field.
- The Std flag should be checked.
- Enter your institutional code(s) in the Banner Value field.
- Enter your Description.
- Save your entries.

Verify the translation

4. Verify the translation entered.



EDI Cross-Reference Rules Form SOAXREF 5.0

Cross-Reference Label: RGTFAID Regents' Financial Aid Codes Copy Table: 

Label	Qualifier	Value	Std	Web	Banner Value	Description
RGTFAID	ATHLD1	ATHLD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SBASM	Athletic Scholarships-disbursed
RGTFAID	ATHLD2	ATHLD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SBBM	Athletic Scholarships-disbursed
RGTFAID	INSTLD1	INSTLD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LNRWVN	Institutional Loans-disbursed
RGTFAID	INSTLD2	INSTLD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LNGARR	Institutional Loans-disbursed

The EDI translation is complete.