

ellucian™

Tennessee State University

Admissions Discovery Assessment

Shane Livingston
Banner Student Systems Consultant

2020/2021

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Prepared by:

Ellucian

4375 Fair Lakes Court

Fairfax, Virginia 22033

USA

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Discovery Objective

The discovery is a primary process initiating the planning phase of Ellucian’s methodology. This assessment identifies opportunities to improve service delivery and student experience by maximizing Banner functionalities. Furthermore, technology management best practices are implemented ensuring business processes are in alignment with Tennessee State University’s mission to achieve the highest quality of education and training.

In this discovery assessment, the objective is to gather pertinent information on registration general processes then evaluate determining if Banner processes is fully functional to maximize operational efficiency. Existing student account modules are reviewed, evaluated and appropriate recommendations are offered improving the overall success of the institution.

The following functional areas are encompassed here in the student module general processes:

- Admission Role and Responsibilities
- Managing Student Recruitment & Prospect Data
- Admissions Process and Self Service
- Communication Plans and Letter Generation
- Mass Entry Process
- General Process Supports and Technologies
- Banner Document Management
- Banner Security, Accessibility, and Training
- Data Management and Reporting

Proposed Schedule for Invitees

Monday, Nov 09	Location: Zoom	Lead: <Name>
1:00 PM – 4:00 PM	Audience: TBD Objective: Admission Role and Responsibilities	
Thursday, Nov 12	Location: Zoom	Lead: <Name>
11:00 AM – 2:00 PM	Audience: TBD Objective: Managing Student Recruitment & Prospect Data	
Friday, Nov 13	Location: Zoom	Lead: <Name>
1:00 PM – 4:00 PM	Audience: TBD Objective: Communication Plans and Letter Generation Mass Entry Process	
Monday, Nov 16	Location: Zoom	Lead: <Name>
1:00 PM – 4:00 PM	Audience: TBD Objective: General Process Supports and Technologies Banner Document Management Banner Security, Accessibility, and Training	
Thursday, Nov 19	Location: Zoom	Lead: <Name>
11:00 AM – 2:00 PM	Audience: TBD Objective: Data Management and Reporting	
Friday, Nov 20	Location: Zoom	Lead: <Name>
1:00 PM – 4:00 PM	Audience: TBD Objective: Data Management and Reporting	

Executive Summary

Tennessee State University does not have a cohesive recruitment or admissions process across the undergraduate business offices. The current leader is eager to establish and move forward after months of observation and identifying opportunities to improve. Recently the institution changed from using a previous software option and is now ready to move forward with Ellucian Recruit and supplementing using Banner Web Applications. Applications were used due to a variety of reasons including: application formats, communication features, reporting features, and analytics. Ellucian Recruit and Banner baseline functionality is ready to be configured and aligned to support improvement opportunities at Tennessee State University. These configurations will address current needs and support future opportunities.

In the initial phase of the discovery assessment, the Admissions' offices participants demonstrated an eagerness and receptiveness to share knowledge on existing business processes in support of learning new technology solutions to continuously improve operations and provide improved service for students, staff, and faculty.

Collectively, the Admissions' offices staff utilize Banner; however, opportunities to implement Ellucian Recruit and leveraging Banner baseline functionality processes with a focus on capitalizing on intelligent scheduler automation assistance will improve institutional effectiveness. A continuous creation of reference documentation for Admissions using Banner Student modules (Ellucian Recruit and Banner and including external resources like the CBCA – Common College Black Application) is a priority to maximize baseline functionality in the transition phase. As an observation, it is evident that this organization embraces innovation and the importance of student success and is ready to proceed, immediately.

Furthermore, references on the implementation of future general processes should serve as a repository provided to all staff in the event of organization restructure or transitioning. The advantage of documentation on specified business processes will reduce learning curves and gaps.
General Discovery Observations

BPR – Admissions Services

Engagement Description

BPR

The consultant will introduce the Ellucian Business Process Review (BPR) methodology for any groups new to the process. The focus of the BPR sessions will be to create and seek out opportunities for improvement and how to approach and manage its future state. The outcome of the Business Process Review sessions will be a framework from which Tennessee State University can further improve their digital campus based on these opportunities, design training for end users, and enforce policies through business process and procedures using CRM Recruit and Banner.

General Discovery Observations

Background

In the Admissions' offices, the following Banner Student Admissions is used. CRM Recruit is or was in process of being configured and aligned and needs to be revisited because Tennessee State University has discontinued use of Hobson's Admissions products. Banner forms are provided as needed to each staff member based on business processing tasks and responsibilities.

Throughout the years, the institution experienced staff transitions creating gaps in knowledge transfer. During these discovery activities the Admissions' offices general business processes were discussed via remote conference meetings which provided an overview of current processes and business practices.

Enrollment Management Leadership

Throughout the remote meetings it became apparent that the leader for this area seeks to identify and configure a streamlined process to create better communication between enrollment management offices and their recruiting and application process interactions with future students. A better applicant/student experience would be an additional benefit for a common coding and processing concept within the University. With a now established and consistent leadership role, resources may be trained in Recruit and Banner to configure, establish, and maintain business processes to support and achieve University goals.

Enrollment Management Office Structure

Throughout the remote meetings it became apparent that Tennessee State University does not have a consistent cohesive recruitment or admission methodology due to recent technology platform changes. Training was completed before current undergraduate Admissions Office leadership arrived and that training led to decisions of configuration using Ellucian Recruit and Banner. The focus of the undergraduate Admissions Office is now positioned and ready to proceed in identifying opportunities to define and update processes. Once established, a consistent processing method will improve applicants, students, and other university staff experience using Ellucian Recruit and Banner. This will create better communication between applicants and all other entities affected by the Enrollment Management areas at Tennessee State University. Further, an immediate high priority focus on improving the CBCA – Common College Black Application data set – extracting the data from CBCA and mapping it to Ellucian Recruit and Banner tables (or from any other authorized application source) and loading it to the appropriate tables is critical (ETL). This will replace manually typing in applications and will provide immediate Return on Investment (ROI).

Banner and Ellucian Recruit Training

Throughout the discovery, the Undergraduate Admissions office was receptive and collaborative in sharing existing functionality with a strong interest in improving operations for sustainability. There is a need to explore formal training and it is critical to improve institutional effectiveness, student, and service satisfaction. This will serve to position the Admissions Office as a central point of reference for other staff and applicants.

Banner Security

Tennessee State University's Registrar manages Banner security and access to applicant and student data. Banner Security for the Admissions' offices should be re-evaluated based on recommendations and banner functionality implementation.

Business Intelligence

The ARGOS & CRM reporting tools are implemented for reporting purposes, but more support needs to be provided for desired reporting. There is a need for ARGOS and CRM training, production access, and reporting modification to improve the overall operations and service delivery. On-demand and other opportunities were mentioned and should be explored. Ellucian IT has begun to provide some reporting and initial efforts have been well received and should continue.

Modifications

Banner baseline is presently utilized throughout the Admissions' offices. A need for modifications is not a priority however there are opportunities to maximize specified baseline Banner processes indicated throughout the discovery to improve operational efficiency and the overall student experience.

3rd Party Systems interfaces with Banner

The Admissions' offices should be utilizing common application product(s) (e.g., CBCA – Common College Black Application, Banner Web Application, etc.) that will provide the necessary functionality and features needed for each office & provide a common tool for support, reducing the needs from IT. ARGOS & CRM tools should be used for reporting. The Admissions' offices would benefit with the currently owned Banner Document Management system to provide an integrated access point to documents and records for the University.

Recommendations Areas

Based on the discovery assessment activities, the following recommendations are considered key priorities for continuous improvement:

- 1) Develop and Implement a Common College Black Application Extract, Transform and Load Process (See “[Student Admission: Managing Student Recruitment & Prospect Data](#)” section for more detail.)
- 2) Prioritize and immediately begin training for the finalization and process improvements by actively participating in Recruit training and review Banner Admissions functionality to update configurations and identify improvement opportunities. (See “[Student Admission: Roles and Responsibilities](#)” section for more detail.)
- 3) Prospect data maintenance should be automated, eliminating manual processes to continuously improve operational efficiency, service, and student success. Align Recruit and Banner to accomplish this (See “[Managing Student Recruitment & Prospect Data Maintenance](#)” section for more detail.)
- 4) Develop and Implement Communication Plans for all applicants. (See “[Communication Plans and Letter Generation](#)” section for more detail.)
- 5) Develop and Implement CRM Recruit and/or Banner Admissions Self Service Functionalities for use with applicants. (See “[Admission Process and Self Service](#)” section for more detail.)
- 6) Develop and Implement Banner Security requests and training for use within the Admissions Offices. (See “[Banner Security, Accessibility, and Training](#)” section for more detail.)
- 7) Develop and Implement a consistent data coding structure to allow enterprise reporting through ARGOS. (See “[Data Management and Reporting](#)” section for more detail.)
- 8) Begin using Admission purge processes to reduce the number of unnecessary records in Banner. (See “[Data Management and Reporting](#)” section for more detail.)

Discovery Findings, Summaries and Recommendations

Student Admission: Roles and Responsibilities

Purpose	<p>List matrix of individuals and associated titles and roles and responsibilities – https://www.tnstate.edu/admissions/contact.aspx</p> <p>admissions@tnstate.edu</p> <p>In Banner Student Admissions Module, Prospect Management, Admissions (AppNav) and Admissions Self Service roles and responsibilities. Before Dr. Scott’s establishment at Tennessee State University, training for Recruit CRM was delivered. This needs to be re-delivered in the effort to align Recruit CRM and Banner Admissions. This will support identified improvements and their associated configurations. An example is how to digitize recruit cards and the CBCA data file. The staff is lean but willing to receive training that will allow them to better use Recruit and Banner Admissions in a way that will allow them to meet institutionally defined goals for admissions and enrollment.</p>
Findings	<p>Observations and Themes</p> <ul style="list-style-type: none"> ○ Roles and Responsibilities

	<p>Dr. Scott's team is ready to move forward, they are awaiting opportunities to receive training for Recruit and Banner Admissions.</p> <p>Issues</p> <ul style="list-style-type: none"> ○ CBCA import is currently manual and requires a lot of detailed data entry input (see below for CBCA ETL recommendations). ○ Recruiting toolkit and technology often chases non-enterprise-oriented tools. Dr. Scoot is looking to identify the best set of tools to minimize and concentrate on improvement opportunities.
Consultant	<p>Recommendations</p> <ul style="list-style-type: none"> ○ Tennessee State University should receive and actively participate in Recruit training and review Banner Admissions functionality to update configurations and identify improvement opportunities. This will allow for Recruit and Banner Admissions to offset many data entry tasks and allow those responsible to make admissions decisions available to do so and increase a focus on applicants becoming students enrolled at Tennessee State University.

Student Admission: Managing Student Recruitment & Prospect Data

Purpose	<p>The purpose of managing student recruitment is to strategically identify quality student populations to fulfill enrollment and retention initiatives. To distinctively target student populations, marketing campaigns, campus tours, recruitment events, and trend data analytics incorporates into the recruitment process. Therefore, student recruitment is essential for the sustainability and overall success of an institution.</p>
Findings	<p>Observations and Themes</p> <ul style="list-style-type: none"> • The CBCA – Common College Black Application is a key and vital source. Other recruiting ad application sources include but are not limited to: College fairs, CircledIn, Social Media resources (Facebook, Instagram, LinkedIn, snapchat, etc.), HBCU Alumni, internal events (preview days, open houses, etc.) and general fairs (High school -local and virtual, faith-based community connections, fraternal and sorority organizations, etc.). The recruiters manage the communication plans with Dr. Scott which includes 20 communication touchpoints that are ready to be configured using CRM Recruit or Banner Communication Manager and transitioned from basic mail merges. These touchpoints will create timely and coordinated email-generated letters for recruiting opportunities. Further, once a recruiting relationship is established then admissions offerings, decisions made, missing item letters, and essential information to complete the application process may also occur. • Dr Scott and team are ready to identify and create an Extract, transform, and load process - On a nightly basis, using an intelligent scheduler (Automic/appworx/UC4 or equivalent), applicant data exports from CBCA – Common College Black Application into the Banner Student Admission module. Updates will then be reflected in the Self-Service Admission portal. • Hobsons was recently replaced with Banner and CRM Recruit and will be paired with the Evision's Argos tool to gather data and analyze key market segments for student retention.

	<ul style="list-style-type: none"> • Dr. Scott and her staff want to learn how to leverage CRM Recruit and Banner to identify the highest ranked territory markets according to predictive data driven analysis. • Admissions objectives are dependent upon department proposals to increase student enrollment based on curriculum programs, institutional research, and to meet the incoming fall freshman admission goals.
<p>Recommendations</p>	<p>Recommendations</p> <ul style="list-style-type: none"> • Focus on the ETL from the CBCA – Common College Black Application into the Banner Student Admission module. Identify tool, frequency, and roles to maintain. • Train critical positions in the following tools: CRM Recruit, Banner and Banner Communication Manager or Recruit equivalent. The focus is to bolster the communication plans and leverage the 20 touchpoints that Dr. Scott has identified. • Determine and identify the CRM and Banner Admissions relationships, once thorough training is provided to Dr. Scott and staff, then that may be capitalized to convert recruiting opportunities into admissions offers and ultimately learners taking courses at Tennessee State University. • Identify CRM Recruit or Banner recruiting option to digitize or where replace the majority of card collected at recruiting events enabling recruits to self-enter information. At a minimum, transform the collected cards into CRM recruit or Banner as quickly as possible enabling recruiting opportunities to be transitioned into applications and ultimately offers of admissions. It is understood that the primary collection may still need to be a recruitment card – with a need for a TSU recruiter to transform that data into CRM Recruit or Banner – BDM may also be used to store collected cards – if desired. • Learn to leverage CRM Recruit and Banner tools such as - SAAMAPP – identify opportunities to update information using the mass update tool, parsing the workload appropriately once the information flows from CRM Recruit to Banner.

Student Admission: Admission Process and Self-Service

<p>Standard Functionality</p>	<p>The purpose of Banner (AppNav) and Self-Service <u>Banner</u> is to complete and submit applications for admission online. To provide flexibility, the system creates a student’s application automatically providing real time web-based accessibility to view the status of required supporting documentation on 24 hours 7 days a week basis.</p>
<p>Findings</p>	<p>Observations and Themes</p> <ul style="list-style-type: none"> ○ There are multiple application avenues into all the Tennessee State schools/programs: APA, AMACS, ACES, CBCA, CRM Recruit and the <u>Banner</u> Web Application. Tennessee State University uses CBCA, Banner Web applications and paper applications. ○ Applications are processed through a combination of feeds and manually: <ul style="list-style-type: none"> ▪ Common Matching by hand through SPAIDEN ▪ Applications manually entered through SAAADMS ▪ Applicant Decisions are entered on SAADCRV. ○ Applicants only interaction with Tennessee State University after application submission, is through manually created emails and letters.

Consultant	<p>Recommendations</p> <ul style="list-style-type: none"> ○ Efforts should be made to clean up STVSGBI so that the baseline functionality throughout <u>Banner</u> can be utilized. ○ Crosswalk should be updated and maintained to connect Admit Type and Student Types as desired. ○ Tennessee State University should implement Recruiter or Banner Admissions Self Service or Recruiter Functionality to improve the overall prospective student experience. <ul style="list-style-type: none"> ▪ Admissions Application ▪ Admissions Checklist ▪ Admissions Application Acceptance ○ Tennessee State University should implement Student Self Service to improve the overall new student experience. <ul style="list-style-type: none"> ▪ This enables inputs such as the CBCA applicants to use Tennessee State University Admissions tools ▪ Applicant status tracking and outstanding checklist fulfillment visibility ▪ BDM file uploads from Admissions/Student SSB ▪ Online Deposits & Payments – if required
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Student Admission: Communication Plan and Letter Generation

Standard Functionality	<p>The purpose of implementing a communication plan and letter generation is to maintain effective communication throughout the student lifecycle. To satisfy recruitment requirements, Tennessee State University, should comply with informing prospective and applicants on recruiting, admissions, and general student processing. Therefore, it is essential to develop a communication plan to communicate with prospects and applicants quickly and efficiently, improving the overall student experience and success.</p>
Findings	<p>Observations and Themes</p> <ul style="list-style-type: none"> ○ Communications are managed through MS Excel, and Word or created manually through email. <p>Issues</p> <ul style="list-style-type: none"> ○ Manual processes increase human error such as data loss, inconsistency, and inaccuracies. ○ Lack of record keeping of communication makes customer service and consistent communication difficult.
Consultant	<p>Recommendations</p> <ul style="list-style-type: none"> ○ Tennessee State University would benefit from implementing Communication Plans – identify when to use Recruit, And Banner Communication Manager to track information in Banner. ○ Mass Emails should be recorded through somewhere for record keeping, either through SOREMAL or ARGOS.

Student Admission: Mass Entry Process

Standard Functionality	<p>The purpose of mass entry processing is to simplify admissions application tasks by updating massive populations, resulting in improved operational efficiency, service, and student satisfaction.</p>
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Findings	<p>Observations and Themes</p> <ul style="list-style-type: none"> ○ Mass entry processing should be implemented in conjunction with Tennessee State University’s processing. ○ The mass entry forms allow users to enter search criteria to select student IDs for updates. Once updates occur, mass entry forms retain the user ID, date, and timestamp, search and update criteria, and student IDs, which are selected for audit purposes.
Consultant	<p>Recommendations</p> <ul style="list-style-type: none"> ○ Mass entry processing in Banner baseline should be maximized utilizing the following applications: <ul style="list-style-type: none"> ▪ SAAMAPP “Admission Mass Entry” processes massive admission updates such as decision codes into SAAADMS “Admissions Application.” ▪ SFAMREG “Registration Mass Entry” processes massive registration including adding or dropping students from courses. ▪ SGAMSTU “General Student Mass Entry” processes massive updates to cohorts or attributes. ▪ SHAMDEG “Mass Entry Graduation” Form processes massive updates to degree award summary when a record from SHADIPL “Diploma” for is not present. ▪ SHAMUDI “Mass Update Diploma” processes massive entries to SHADIPL “Diploma” as a validation and cross reference of SHADEGR “Degree Summary” form. ▪ SHAMDIP “Mass Entry Diploma” processes massive entries to SHADIPL “Diploma” as a validation and cross reference of SHADEGR “Degree Summary” form. ▪ SHAMCAT “Mass Entry Ceremony” process massive updates to ceremony logistics such as the room and location. ○ The process distinctly identifies student populations according to user defined searches eliminating manual data entry processing. In additional, <u>Banner</u> baseline functionalities improve operational efficiency.

Student Admission: General Process Supports and Technologies

Standard Functionality	<p>You can either view or create related data from a person or recruitment opportunity record. Some related information is displayed only for prospective students.</p> <p>Some related data is created during imports, other data is sent from your ERP system, and still other data can be created manually. Participation in events, Academic History (High School and College), Test Scores and Supplemental Items may all be collected and stored using CRM Recruit and Banner. Once configurations are identified, gaps may emerge, and Dr. Scott may make future decisions.</p>
Findings	<p>Observations and Themes</p> <ul style="list-style-type: none"> ○ Tennessee State University has determined that CRM Recruit and Banner are the two mainline General Process and Support Technologies. Dr. Scott is trying to identify the most correct tools for her operation. Once Recruit

	configurations, training and alignment with Banner are finalized, then Dr. Scott will have a better understanding of what process gaps exist.
Consultant	<p>Recommendations</p> <ul style="list-style-type: none"> ○ Receive CRM Recruit training to finalize configurations and finalize Banner alignments. ○ Identify the CRM Recruit Communications tool and Banner Communications Relationship. ○ Determine which system should be the source for Suspects, Prospects and Admissions applicants and if the CRM or the ERP should house the history and context of communications.

Student Admission : Banner Document Management

Standard Functionality	The purpose of <u>Banner</u> Document Management (BDM) is to service as an electronic imaging and document system for institutions by integrating a document manager and web access.
Findings	<p>Observations and Themes</p> <ul style="list-style-type: none"> ○ <u>Banner</u> Document Management is implemented and used – opportunities for process support and improvement should be persistently reviewed and sought after. ○ Hardcopy files for each applicant with relevant documents are created and collected via <p>Issues</p> <ul style="list-style-type: none"> ○ BDM re-training may be required as Recruit and Banner are configured and aligned to best optimize document storage to support prospects and applicants. Recruiting cards may not be stored – need to determine should they be scanned or if unnecessary.
Consultant	<p>Recommendations</p> <ul style="list-style-type: none"> ○ <u>Banner</u> Document Management should continue to be utilized to store all the admissions document requirements. ○ Configure and/or implement the feature of indexing to update critical checklist items and demonstrate those statuses to the students via Self Service. ○ Implement the ability for students/applicants to upload their admissions requirements through Banner Self-Service. This will speed up processing within the Admissions Office and reduce the amount of scanning required. ○ Utilize BDM and Banner Workflow to process Applications as process improvements occur.

Student Admission: Banner Security, Accessibility, and Training

Standard Functionality	The purpose of Banner Security is to govern user access and privileges to <u>Banner</u> systems. In addition, consistent <u>Banner</u> accessibility is essential for continuous productivity to maintain an institution's overall success.
Findings	<p>Observations and Themes</p> <ul style="list-style-type: none"> ○ <u>Banner</u> access should be granted according to user role and responsibility based on management approval.

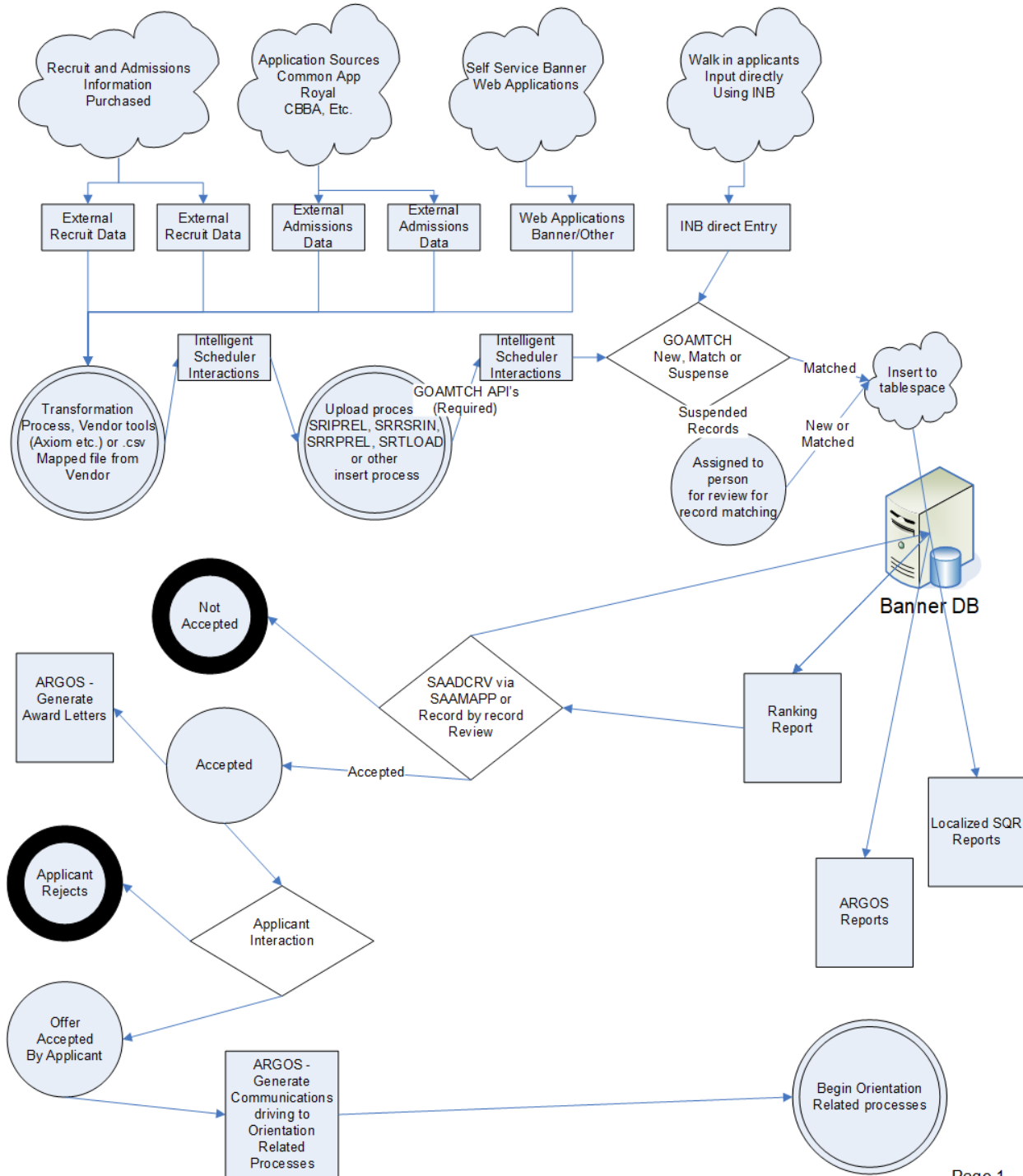
	<ul style="list-style-type: none"> ○ A review of the current form and process is useful in documenting requests and access granted. <p>Issues</p> <ul style="list-style-type: none"> ○ <u>Banner</u> access may be set up appropriately but many of the admissions staff do not have functionality knowledge of <u>Banner</u>.
Consultant	<p>Recommendations</p> <ul style="list-style-type: none"> ○ <u>Banner</u> access should be granted according to user role and task/process fulfillments based on management approval. ○ There should be a mandatory <u>Banner</u> Security process to document requests and access granted. Additionally, a conversation about why the access is requested and either granted or not granted should be held between supervisors and the security stewards. ○ Training on forms should be scheduled and provided when access is given.

Student Admission: Data Management and Reporting

Standard Functionality	<p>The purpose of data management and reporting is to improve decision support fulfilling enrollment and management planning initiatives. In addition, enterprise reporting tool is the ability to maximize 3rd party products, reduce support efforts, and help provide consistent numbers and data to all offices across the University.</p>
Findings	<p>Observations and Themes</p> <ul style="list-style-type: none"> ○ A mix of reports/reporting tools are currently used, but once the CBBA process can be loaded then ARGOS can serve as the centralized tool. ○ Reporting is ad-hoc and Dr. Scott would like to be able to better leverage Argos and not rely on tools like excel to join Banner and CBBA and other sources into one. Dr. Scott is on top of her numbers and reports, and once the data sources are centralized and loaded into CRM Recruit and Banner, the return on investment is freeing up her time to do other things. <p>Issues</p> <ul style="list-style-type: none"> ○ The current reports take a lot of time for Dr. Scott to create although she has expended considerable talent in assuring they are as efficient as possible in their current state.
Consultant	<p>Recommendations</p> <ul style="list-style-type: none"> ○ Review and strengthen and utilize a common coding structure across all Admissions Offices/Schools (i.e., Admit Types, Admission Decisions, etc.) ○ Create an enterprise list and definitions of needed reports across – strengthen Dr. Scott’s efforts. ○ Provide training and support to Admissions to learn how ARGOS works and help build enterprise reports. ○ Once CRM Recruit and Banner are aligned and the load process for the CBBA are finalized, ARGOS reporting can become a point of focus to strengthen the considerable value that Dr.,\). Scott already provides.

APPENDIX A – CBBA Future Visualization

Source Agnostic – UG Recruit and Applicants – Proposed Future State



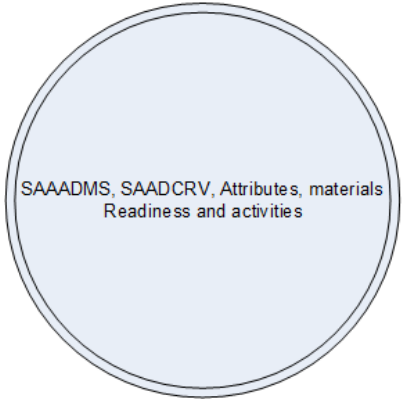


Need to determine how each vendor source file may be formatted into a file type and format that is deemed trustable so that no manipulation by admissions personnel is required.
Need to determine process to accomplish and how to maintain that vendor relationship into the future.



Standard practice should assure that Baseline Banner API's are leveraged first. If any ETL is required, Development should always assure that API's are reviewed And explored first. If they are not followed, then they MUST Be thoroughly documented so that future evolution or change Management is feasible and trackable. The data being consumed from 3rd party vendors is often not complete, and may require a Conditional checking prior to allowing entry into Banner.

ACTION:
Determine controls, methodology and enforcement into the future.



- Determine which elements may be searched and updated using SAAMAPP
- Determine which Attributes to add based on characteristics and templates
- Determine which Material codes to add/update based on characteristics and templates
- What other activities need to occur?

ARGOS reports to support SAAMAPP shortfalls? Usage of MDUU?

APPENDIX B – Banner Documentation

Prospect/Recruiting and Admissions Banner Documentation

Prospect Data Maintenance

The Office of Undergraduate Admissions prospective data cards are evidence of existing manual processes supporting efforts of fulfilling student recruitment initiatives. In addition, the supporting Self-Service Prospect documentation is evident of a Banner baseline solution to continuously improve operational efficiency, service, and student satisfaction.



Self Service Prospect
Set Up.pdf

Self Service Admissions

The Office of Undergraduate Admissions has distinctively defined requirements that students must satisfy to finalize student application process including key communications from the University to alert them to actions that may be required at key points in the processing. The supporting document provides the benefits of Banner Self-Service to fulfill student recruitment and retention initiatives.



Admission Self
Service Overview.pdf

Banner Document Management

The Office of Undergraduate Admissions utilizes Banner Document Management to improve service delivery and applicant success; however, there is an opportunity to import official transcripts by automatically indexing into Banner Document Management. The supporting document provides details of benefits and functionalities.



Banner Document
Management Guide.p

Transfer Equivalency

The Office of Undergraduate and Graduate Admissions can streamline existing transfer equivalency processing utilizing Banner baseline processes as a process improvement initiative. The supporting document provides details of benefits and functionality.



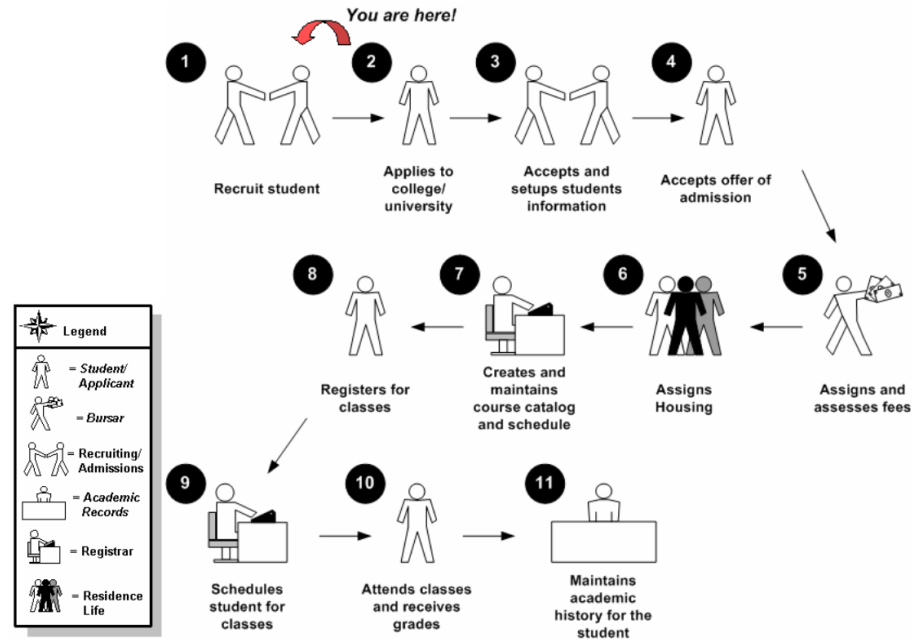
Banner Course
Transfer Equivalency .

Test Score Data Maintenance

To add, maintain, and view students test scores, the Office of Undergraduate and Graduate Office utilizes the SOATEST test score information form which is linked to SAAADMS admissions application form and the student's checklist. In addition, test score data loads and maintenance is essential to successfully complete the overall student process.

Flow diagram

This diagram indicates where the tape load processes fits into the overall Student process.



About the process

In the basic tape load process

- persons are created and maintained
- supporting General Person information is created and maintained.

Managing Student Prospect Admissions Recruitment

To improve operational efficiency and student satisfaction, manual scheduling of recruitment appointments should be eliminated to fully maximize Banner functionalities. The supporting document shows the benefits of utilizing Ellucian CRM Recruit to encompass prospect recruitment and online admission application processing.



Ellucian CRM Recruit
Benefits.pdf

APPENDIX C Process Training Aids

User Notes

These generic notes are intended to be an enhancement to training and Banner provided user documentation. Before implementation in a live database, it is expected that the steps, guidelines and/or rules shown will be tested in a non-production database and that the user confirms the results meet process requirements. These aids are specific to Banner.

The Admissions Checklist

Rules may be established for automatic population of admissions checklist items based on campus, program, or other institutionally specific criteria.

Pre-Requisite Activities/Processes

- Banner Basics & Navigation
- Search/Extended Search
- Registration Procedures

STVADMR

Use this form to create new Checklist Items

1. Launch STVADMR
2. On a new blank row (F6) enter a Request Code
3. Tab
4. In Description enter a description
 - Descriptions are limited to 30 characters
 - Descriptions may display in Self-Service Banner
 - Descriptions are free-form fields – no spell check
5. Tab
6. In Cross Reference Table Name enter the associated table name if applicable
 - Source/Background Institution Validation Form (STVSBGI)
 - Test Score Code Validation Form (STVTESS)
 - Visa Type Validation Form (STVVVYP)
7. Tab
8. Click the Web Indicator checkbox if this Checklist item should display in Self-Service Banner
9. F6 to enter additional items
10. Save/Exit when finished

SAACHKB

Use this form to create checklist rules.

1. Launch SAACHKB
2. Enter or search/select term in Key Block
 - This is the Admissions Term for which rules are to be built
3. Next Block
4. On a New Blank Row (F6) enter or search/select the Checklist Item Code
 - First check if the code already exists
 - If the a desired code does not exist, use the drop-down to select an item
5. Tab to Term and enter or search/select appropriate term to start this checklist item
 - This is the term in which checklist items become effective
 - This term may be the Beginning of [Banner] Time 000000 or any term used by Admissions
 - To make changes for the current term, enter or search/select the current term Term Code
 - To make changes for a future term, enter or search/select the future term Term Code
6. Tab to Mandatory & check mark if appropriate

7. Tab to all other columns and use the drop-down to select limiters for the Checklist rule
 - Use only limiters that are required
 - If a checklist item is mandatory for all, limiters are not necessary
 - For example: Tab to Program & Select from the drop-down to limit the Checklist item by program; Level can be used to limit Checklist items to only Undergraduate applicants
8. Save
9. Continue with additional entries (F6) or Exit

Web Application - Processing Forms & Procedures

Processing Forms & Procedures

Banner Forms and Description - If Available	Purpose
SAAEAPS - Electronic Application Process Form	<ul style="list-style-type: none"> • Allows users to view, verify and load data into Banner permanent tables, • Look up applicant User ID, PIN and Change PIN.
SOAEIDN - Electronic Applicant Search Form	<ul style="list-style-type: none"> • Used to perform name or ID searches on applicants in the temporary (holding) tables, not yet pushed into Banner permanent tables. • (accessed through SAAEAPS & SAAETBL forms)
SAAETBL - Electronic Admissions Submitted Form	<ul style="list-style-type: none"> • Used to review application detail in the temporary tables prior to loading into Banner permanent tables.
SARETBL - Electronic Application Report	<ul style="list-style-type: none"> • This report pulls data from the temporary tables.
SARETMT - Electronic Application Verify/Load Process	<ul style="list-style-type: none"> • Batch process used to match, verify, and load web applications. • Allows multiple Applications to be PUSHed
GOADDR - Address Review and Verification Form	<ul style="list-style-type: none"> • This form allows users to review address changes or additions to the database.
SAAADMS - Admissions Application Form	<ul style="list-style-type: none"> • Record should exist here if PUSHed and LOADED to BANNER.
SARETPG - Electronic Application Purge Process	<ul style="list-style-type: none"> • This process is used to purge application data from the temporary tables.

Processing Applications Entered via the Web

*****PUSH PROCESS STEP-BY-STEP*****

SAAEAPS: Electronic Application Process Form

You may use this form to perform manual verification of applications entered via the web. After an applicant submits an application, the application cannot be updated on the web. From this form, you may delete frivolous applications.

Manual Verification:

1. Display received applications.
 - a. "Perform a Next Block function. (Opens in Query Mode)

- b. F8 to execute query on Complete Indicator: checked and Source: WEB"

Web ID	Applicant Name	Application Preference	Application Number	Applicant Record Type	Application Type	Completion Indicator
MHASSAN	Mouse, Minnie		1	N	00	<input checked="" type="checkbox"/>
Banner ID:	Term: 200920	Process: N Not Verified	Source: WEB	Add Date: 18-DEC-2008	Process Date:	
Accepted Indicator: Y	City: Abu Dhabi	State: AUH	Zipcode: AUH	Nation: UAE	Application Status: Y	Process Complete

2. Flag applications for further processing.

- For those applications which you will further process, set the Accepted indicator to Y. Save.
- Use an N if you wish to delay processing, e.g., until the application fee is received. Save.
- Do not continue processing.

Web ID	Applicant Name	Application Preference	Application Number	Applicant Record Type	Application Type	Completion Indicator
MHASSAN	Mouse, Minnie		1	N	00	<input checked="" type="checkbox"/>
Banner ID:	Term: 200920	Process: N Not Verified	Source: WEB	Add Date: 18-DEC-2008	Process Date:	
Accepted Indicator: Y	City: Abu Dhabi	State: AUH	Zipcode: AUH	Nation: UAE	Application Status: Y	Process Complete

3. Perform any required manual verification steps.
- Select the Verification Steps tab,
 - From the Options Menu, select Manual Verification Steps to transfer to the Verification Steps window.
 - select Associate Person with ID from the Options Menu to transfer to the Associate Person with ID window

Step	Add Date	Completion Indicator	Completion Date
IDNR Allow Manual ID Verification	18-DEC-2008	<input checked="" type="checkbox"/>	

4. Select the Associate Person with an ID button. This will display GOAMTCH.

Select an ID:

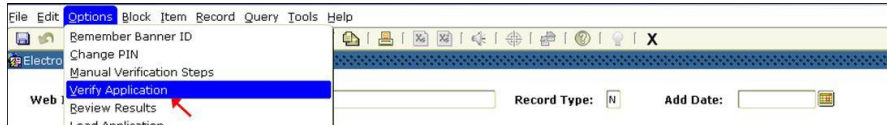
Electronic ID: MHASSAN
 Local ID: 123456789
 SSN:
 Banner ID:
 Generate ID

First Name: Minnie Middle Name: Last Name: Mouse

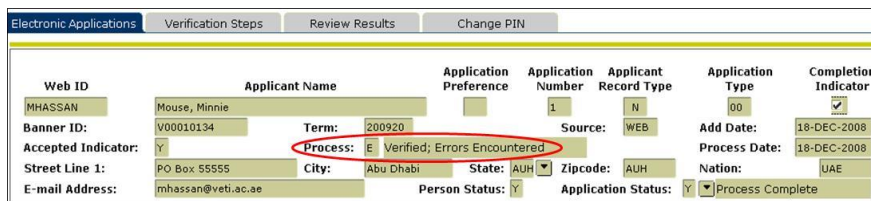
Username: SAISUSR Origin: SAAEAPS

Associate Person with an ID (or Press SAVE):

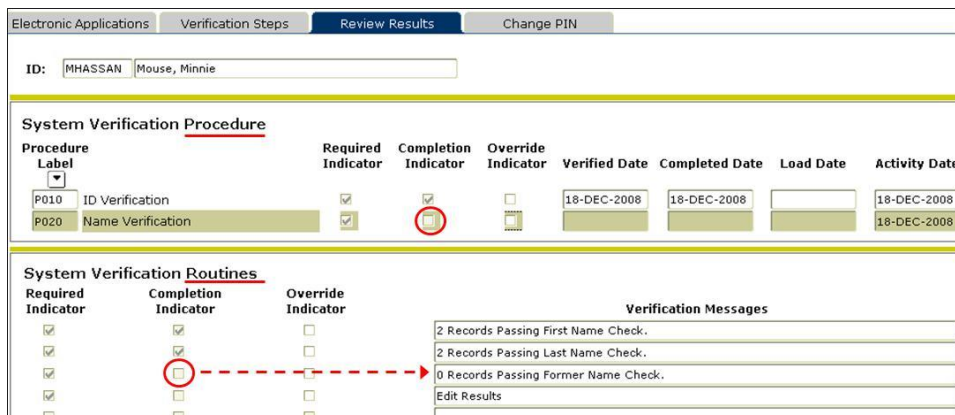
5. In GOAMTCH, perform a Next Block function to display the person information entered on the application.
 - a. Correct any information (e.g. address format) and perform a Duplicate Check. Create a new ID or use an existing match.
 - b. The GOAMTCH form will close and take you back to the Verification Steps tab of the SAAEAPS form.
 - c. Save, and return to the Electronic Applications tab of the SAAEAPS form.
6. Verify the application data.
 - a. Select Verify Application from the Options Menu to verify the application data.
 - b. Verification performs all verification procedures and routines attached to the application which have not been overridden.



7. Review errors, override verification, or correct data.
 - a. After an application has been verified, its Accepted Indicator on the main window of SAAEAPS is set either to E, which indicates that errors were found during verification or V for verification complete.



- b. If errors are encountered during verification, select Review Results from the Options Menu or use a Next Block function to review the results. The Verification/Load Results window is displayed.
- c. Verification errors must be resolved before the data can be loaded into the Banner permanent tables from the holding tables. You resolve verification errors by overriding the routine which failed or by overriding the entire procedure. If you override an individual routine, only the verification associated with the individual routine will be by-passed. If you override the procedure, none of the individual routines will be performed.



- d. After overriding all routines or procedures that you wish to have ignored, use the Return button to return to the main window of SAAEAPS, and select Verify

Application from the Options Menu to verify the information again. Only data which had not previously been verified is processed. Procedures in which you overrode routines can now be verified.

- e. You should continue verifying data and overriding routines and procedures until verification is complete (the Accepted Indicator displays V for Verified). When you push data into the permanent tables, data for procedures which have been verified is loaded, regardless of the status of other data.
8. Load the verified information into the permanent tables.
 - a. Select Load Application from the Options Menu or use an Insert Record function to push the data to the permanent tables.



- b. This will “push” the data from the temporary holding tables into the Banner permanent tables.
 - c. “Data Pushed” will appear in the Process field. The Process Indicator changes to P (Pushed).
 - d. You now should be able to see the application data on various Banner forms, depending on what data was submitted and pushed.
9. Review application data that was loaded.
 - a. SAAADMS
 - i. Record should exist if PUSHED and LOADED to BANNER. (App will not get created if program cannot be determined)
 - b. GOADDR
 - i. Review addresses entered online. Once marked as 'Reviewed' the address no longer is displayed.
 - ii. May review by Userid (of the 'Push'er)
 - c. SAAQUAN
 - i. Answers to questions
 - d. SOACCOL
 - i. Communication Plan Collector Form/Table
 - ii. May process individually -or- Run SORCPLN
 - iii. May need PREL group (COMMPLAN = Y) on SAAERUL to get ID written to collector file.
 - e. SOATEST
 - i. Test scores

NOTES ON REVIEWING VERIFICATION ERRORS

1. Check "Review Results"
 - a. This shows you, Procedure by Procedure, the data that was checked.
 - b. If something does not pass the required Routine, the record will not be "Pushed" into Banner Production.
2. Overriding at the Procedure level overrides all Routines associated with it. None of the data related to that entire Procedure would be "Pushed."
3. If you override at the Routine level, none of the data related to that individual Routine would be "Pushed."
4. Make all necessary overrides.
 - a. SAVE

ADDITIONAL INFORMATION AND NOTES:

On the main screen, the Pers. Status field indicates whether person ID verification has taken place, i.e. whether this application is associated with a PIDM or not (either by matching an existing person record or creating a new one.

The App. Status field indicates whether all the manual verification steps have been completed for an application.

If an application is not marked "complete", then although you can change the Accepted Field to Y, otherwise when you click on Manual Verification, you may get the following error: "Application is marked Incomplete, Cannot Verify."

If ID verification has not taken place and the application is not yet associated with a PIDM, the "Complete" indicator can be unchecked to allow an applicant to further update their web application and mark as complete and resubmit. You will then need to mark the application "Complete" and then proceed with the verification process.

When you try to Verify Application, if you get Oracle errors this means that there is something wrong with the setup of the procedures and routines on SAAECRL. Review them again. Contact your IT support if you are still getting "Push" errors. IT may need to submit a contact to the Ellucian Customer Support Center.

Residency: There is no mechanism to permit a student to establish residency status. Currently, the residency is a default code entered on SAAERUL. The processor has the option to change this after the "Push" process.

SAAEAPS

Process Codes	Description
V	Verified
E	Errors
S	Suspend
P	Pushed
N	Not Verified

Trouble Shooting and/or Diagnosis

- Interests and Sources ONLY load for New Person IDs. If a person is a match with an existing ID in Banner then Source and Interest will NOT load.
- Concentrations do not display -- verify that SAAERUL for FVLV has the concentration code entered. Also, SOACURR must have the display on web indicator checked (and description updated if desired)
- Verification and Push Errors -- data not loading.

The required elements on your Web Application type (SAAWAPP) must match the required procedures and routines in SAAECRL.

APPENDIX D - Mass Forms (See– Mass Entry Processing in the Banner Student user Guide 8.6)

Refer to the [\[Banner Student User Guide 8.7.pdf\]](#) Appendix: Mass Entry Processing for the following Mass Entry Forms

Admissions

- **Admissions Mass Entry Form (SAAMAPP)**

Admissions and Records Maintenance (Registrar's Office or similar)

- Mass Entry Athletic Compliance Form (SGAMSPT)
- General Student Mass Entry Form (SGAMSTU)
- Registration Mass Entry Form (SFAMREG)
- Mass Entry Graduation Form (SHAMDEG)
- Mass Entry Ceremony Attendance Form (SHAMCAT)
- Mass Entry Diploma Form (SHAMDIP)
- Mass Update Ceremony Attendance Form (SHAMUCA)
- Mass Update Diploma Form (SHAMUDI)

Mass Entry Forms Overview and Highlights

Mass entry processing is used with Admissions, General Student, Registration, Academic History graduation, and athletic compliance processing. Mass entry forms are used to search on data, perform updates, and then display the results for review.

Mass entry processing is based on user-defined search and updates criteria and includes curriculum elements where appropriate. Users can select students based on form search criteria and update their data based on the update criteria. The selected students can be reviewed, and the updates selectively processed. Updates can be processed immediately or held for later processing in job submission using a batch process. An audit form is used to view processing results for the mass entry forms, whether the results are processed immediately on the mass entry form or via batch.

The mass entry forms retain audit information such as the user ID, date, timestamp, search criteria, update criteria, and the students that were processed. Audit information can be purged. The mass entry forms can also be used to only query student information, in which case the audit information is not retained.

The mass entry forms allow you to enter search and query criteria to select IDs for update. Depending on the mass entry form used, the parent records of selected IDs can have specific values updated, as well as a pending letter inserted in SUAMAIL. Search and update validation is performed using mass entry column codes from the Mass Entry Column Validation Form (STVMECL). Updates can be submitted immediately on the mass entry form or held for batch processing using the Process Mass Entry Report (SORMEBP). Immediate and pending updates can then be viewed on the Mass Entry Audit Form (SOAMAUD). Result messages are captured when updates occur and can be reviewed directly on the mass entry form at the time of the update and/or on the mass entry audit form after the updates are submitted in batch. Reviewing update result messages allows for failed inserts and updates to be resolved. The Purge Mass Entry Audit Process (SOPMAUD) is used to delete mass entry audit records.

When updates occur or when updates are held for batch submission, mass entry forms retain the user ID, date and timestamp, search and update criteria, and IDs, which are selected for audit purposes. When the forms are used for query only, no updates are processed, and audit information is not collected.

Population Selection

Population selection can be used in conjunction with search criteria. The only search criteria required when using population selection is the search term, but other search criteria can be used as well. The population selection is created using GLBDATA for an application ID, selection ID, creator ID, and user

ID. Each mass entry form offers the use of population selection in the Search window. The search processes an “intersect” and only considers records that meet the basic search requirements of the mass entry form and are included in the population selection.

For example, for records to be presented on SHAMDEG, a degree record must exist, so only students with degree records will be returned. When search criteria are used along with a population selection on SHAMDEG, the search results require the records presented to have degree records and be included in the population selection.

Mail Submission

Mail submission can be used to update letters in SUAMAIL for all mass entry processing except registration mass entry. Updating letters does not require additional update criteria. The update exceptions are:

- When no ceremony code or ceremony term values exist on SHAMCAT in the update criteria, letters are not updated.
- When no processing term exists on SGAMSTU in the update criteria, letters are not updated.

When letters are updated in SUAMAIL using the mass entry graduation forms, they will have a module of `Student` and a term of `999999`. Letters updated using SAAMAPP will have an admissions module with the application term and application number selected for update. Letters updated using SGAMSPT will display a term code on SUAMAIL that reflects the copy, insert, or update term from the mass entry criteria.

When the **Initiated Date** field on the mass entry form is null, the value defaults to the system date, but it may be submitted with a different date. When the **Print Date** field on the mass entry form is null, SUAMAIL is updated with a null value, which signifies the existence of a pending letter. The **Print Date** may also be submitted with a valid date. Letter generation will not produce a letter if the **Print Date** field has a value.

Mass entry letters are inserted into SUAMAIL with a source of `Generated`. Letter updates are dependent on the setting of the **Allow Duplicates** checkbox on GTVLETR.

When the **Allow Duplicates** field is set to `Y`:

- A new letter for the same term can be entered, as long as a pending letter does not exist for the same letter name and term.
- A new letter can be entered for a different term, even if a letter of the same name is pending.
- A different letter can be entered for any term when a print date has been entered in the update criteria, even if a letter with the same name exists.

When the **Allow Duplicates** field is set to `N`:

- A new letter cannot be entered for the same letter name and term, whether the letter is pending or not.
- A new letter can be entered for the same letter name in a different term, whether the letter is pending or not.
- A new letter cannot be entered with the same letter name and term, even when the print date has been entered in the update criteria.
- A new letter of the same name for a different term can be entered when the print date has been entered in the update criteria, whether or not the letter is pending on SUAMAIL.

When a letter is requested through the Mail Submission section of a mass entry form, SUAMAIL is updated with the origin, as are SAAADMS (Fees, Mail Submission, Withdrawal Data window) and SAADCRV (Application Decision Letter window).

The mass entry process holds the insertion of letters until all other processing has occurred for the mass entry form. The results of the insert/update criteria can affect the insertion of the letters.

- Letters are not inserted if all other processing updates have failed.
- Letters can be inserted when the mass entry form is submitted with only letter information and no other update criteria.
- When a form requires update criteria, such as term code (SAAMAPP, SGAMSTU, SGAMSPT) or term and ceremony (SHAMCAT), letters are not inserted without valid criteria.
- Letters are inserted when the updates are partially successful.
- Letters are inserted when the updates are completely successful.

Note: Materials and communication plans are not used with mass entry mail submission.

Communication Plans

When SAAMAPP or SGAMSTU are updated, records are placed in the Communication Plan Collector Form (SOACCOL). If you do not use communication plan processing or prefer to remove records from SOACCOL, you may use the Communication Plan Processing Report (SORCPLN) to process all SORCCOL records in batch.

Hold

Hold is presented for informational purposes only and does not prevent updates from taking place during mass entry processing. Graduation mass entry presents graduation holds. General Student mass entry presents accounts receivable and enrollment verification holds. Admissions mass entry presents application holds.

Note: When error checking is set to Fatal for holds on SFAMREG, and holds exist for the student, when the student is processed for registration, an error message is displayed in the Results window that the student has holds and cannot register.

Mass Entry Form Record Required Parent Form

Mass Entry Form	Record Required	Parent Form Updated
SAAMAPP	SAAADMS (term and application number)	SAAADMS
SFAMREG	SFAREGS	SFAREGS, TSAAREV
SGAMSTU	SGASTDN (active in effective term being searched)	SGASTDN, SGASADD
SHAMDEG	SHADEGR	SHADEGR, TSAAREV
SHAMCAT	SHADEGR, but cannot have SHACATT record	SHACATT, TSAAREV
SHAMDIP	SHADEGR, but cannot have SHADIPL record	SHADIPL, SHACATT, TSAAREV
SHAMUCA	SHACATT	SHACATT, SHADIPL
SHAMUDI	SHADIPL	SHADIPL, SHACATT

SAAMAPP – Admissions Mass Entry Form

Admission Mass Entry processes massive admission updates such as decision codes into SAAADMS “Admissions Application.” This form allows for mass updates on available Admissions attributes and may also update SUAMAIL using population selections and other items. Re-training and thorough usage options needs to occur to improve usage of this form.

SFAMREG - Registration Mass Entry Form

This form is used in conjunction with cancelled classes. Consultant briefly demonstrated how to use the search tab to identify populations and raw totals or counts. Re-training and thorough usage options needs to occur to improve usage of this form.

SGAMSTU - General Student Mass Entry Form

This form was not discussed as used. This form can be leveraged for mass cohort and attribute inserts/updates/changes. Consultant briefly demonstrated how to use the search tab to identify populations and raw totals or counts. Re-training and thorough usage options needs to occur to improve usage of this form.

SHAMDEG - Mass Entry Graduation Form

Certain elements are used to support graduation processing. During the roll out of the Online Graduation Application training will be required to strengthen associate business processes. Consultant briefly demonstrated how to use the search tab to identify populations and raw totals or counts. Re-training and thorough usage options needs to occur to improve usage of this form.

Example – the graduation status field can be used to identify counts and do updates to move records from application to Certification and completion or carry-overs.

SHAMUDI - Mass Update Diploma Form

Re-training and thorough usage options needs to occur to improve usage of this form.

SHAMDIP - Mass Entry Diploma Form

Re-training and thorough usage options needs to occur to improve usage of this form.

SHAMCAT - Mass Entry Ceremony Attendance Form

Re-training and thorough usage options needs to occur to improve usage of this form. If applicable.

SGAMSPT – Mass Entry Athletic Compliance Form -not mentioned verbally during visit

Re-training and thorough usage options needs to occur to improve usage of this form. Athletics is seeking training in this specific area.

SHAMUCA - Mass Update Ceremony Attendance Form

Re-training and thorough usage options needs to occur to improve usage of this form. If applicable.

How to leverage the population selection features to identify populations to use and update

- Mass forms may be used in conjunction with population selections to update fields and specific populations the search options may not be able to clearly identify
- Can also leverage to identify unofficial counts and/or for testing populations