

**Youngstown State University
Follow-up Report for July 11-13, 2007
July 16, 2007**

Please distribute to all attendees. This information will help them in the future.

Account Information

Project name:	Youngstown State University
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Distribution:	SCT	Keith Miles	Project Manager
	Youngstown State University	Carol Chen	Project Manager

Objectives

- | |
|---|
| <ul style="list-style-type: none"> • Population Selection and Letter Generation training • Letter and population selection consulting for specific offices: AR, Admissions , Registration and Records |
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Attendance

Client and SCT personnel in attendance.

Office	Name	Position	WED		THU		FRI	
			AM	PM	AM	PM	AM	PM
Admissions	Hubert, Christine	Assoc. Dir. of Admissions	X	X	X	X	X	X
Admissions	Jones, Ruby	Computer Operator	X	X	X	X	X	X
Computer Services	Thomas, Jason	DBA	X	-	X	-	-	-
Computer Services	Roberts, Mike	DBA	X	-	X	-	-	-
Computer Services	Sewell, Doug	Systems Admin.	X	-	X	-	-	-
Computer Services	Drabison, Maureen	Programmer	X	-	X	-	-	-
Computer Services	Davidson, Nancy	Programmer	X	-	X	-	-	-
Computer Services	Noble, Mary	System Analyst	X	-	X	-	-	-
Computer Services	Chen, Carol	Banner Project Manager	X	-	-	X	X	X
HR	Trube, Carol	Manager, Classification & Compensation	X	X	-	-	-	-
Records/Registration	Garchar, Debbie	Ass. Dr. records	X	X	X	-	-	-
Records/Registration	Janyk, Jonathan	Web Developer/Site Manager	X	X	X	-	-	-
Registrar	Herman, Jeanne	Assoc. Registrar	X	X	X	X	X	X
Student Accts.	Kish, Kathy	Collection Supervisor	X	-	-	-	-	-
Student Accts.	Showman, Shawnee	Proj. Specialist	X	-	-	-	-	-
Student Accts.	DeFrances, Bob	Mgr, Customer Services	X	-	-	-	X	-
UG Admissions	Davis, Sue	Director	X	X	X	X	-	-
Student Affairs	Caputo, Jayne	Adm. Asst.	X	-	-	-	-	-



Follow-up Report

Office	Name	Position	WED		THU		FRI	
			AM	PM	AM	PM	AM	PM
Alumni Relations	Belgin, Heather	Coordinator	X	X	-	-	-	-
Alumni Relations	DeBernardo, Erin	Admin. Asst	X	X	-	-	-	-
IR	Taraszewski, Steve	Research Anaylst	X	X	-	-	-	-
UG Admissions	DeLuco, Mary Beth	Adm. Asst.	X	X	-	-	-	-
Financial Aid	Ruse, Elaine	Director	X	X	-	-	-	-
Financial Services	Adams, Rhonda	Financial Analyst	X	X	-	-	-	-
HR	Wainio, Donna	TR/Tech	X	X	X	X	X	-
Computer Services	Salem	Programmer Analyst	-	-	X	-	-	-
IR	Naples, Robin	Prog/Analyst	Xx	X	-	-	X	-

Progress Report

Accomplishments:

The attached spreadsheet **YSU 2007-07 PROJECTS** is integral to this report and required reading. It contains details and examples of the projects, including population selection rules, variable rules, the structure of the banner Letter and Paragraphs and examples of the parameters used for the various processes.

TABLE OF CONTENTS	A list of all the worksheets in the spreadsheet
OPEN AND CLICK TO GET LIST	The worksheet that creates the table of contents
ALL - POP SEL LIST	A list of all the pop sels created for this consultation
ADMISSIONS PROJECTS	A list of the ADMISSIONS projects and their status
ADMISSIONS - UG DEANS LETTER	A description of this project
ADMISSIONS POP SELS	The rules for the ADMISSIONS pop sels created during this consultation
ADMISSIONS VARIABLES	The rules for the ADMISSIONS variables created during this consultation
R&R PROJECTS	A list of the R & R projects and their status
R&R GRADE NOTIFICATION	A description of this project
R&R READMIT LETTER	A description of this project
R&R POP SELS	The rules for the R & R pop sels created during this consultation
AR PROJECTS	A list of the AR projects and their status
AR - REGISTRATION HOLDS	A description of this project
AR - PAST DUE NOTICE	A description of this project
AR - FINAL LETTER	A description of this project
AR - COLLECTION REVIEW	A description of this project
AR - FIN SUSP	A description of this project
AR - SAR_LATE_FEE	A description of this project

OVERVIEW: (For details, see section below and the EXCEL spreadsheet)

POPULATION SELECTION AND LETTER GENERATION TRAINING

- Thanks to YSU's experience with letter generation since my visit a year ago, the abbreviated population selection and letter generation training was successful. Users built a sample letter and a population selection and ran the associated processes: GLBDATA, GLBLSEL, and GLRLETR.
- The sample project involved selecting applicants to be sent a letter acknowledging their application with different text based upon whether the applicant did or did not have missing checklist items.
- I demonstrated how to use the data to create a WORD letter using conditions that insert different messages based on whether the application was complete or not.
- I introduced the process processes SURDEL and SURLOAD. I demonstrated how to run SURDEL to delete letters from the mail form.
- I demonstrated the process GURPDED:
 - 'S' tables: owned by SATURN
 - 'T' tables: owned by TAISMGR
 - All views are owned by BANINST1
 - Views have the THIRD character in their name = V and the SECOND character is anything but T
 - I will attach a list of some useful views
- They also left with instructions to think about their letters in a new way conditioned by what they know of Banner Population Selection, Banner Letter Generation and the power of WORD.

POPULATION SELECTION AND LETTER CONSULTING:

Overview:

- Admissions:
 - We replaced 6 or 7 processes for producing the Dean's letters with one process
 - We replaced 2 processes for producing the worksheet and folder label with one process
- AR
 - We developed solutions for 6 projects
- Records and Registration:
 - We developed solutions for 3 projects

I have included the following sections:

- COMPARISON: RUNNING A BANNER POPULATION SELECTION AND A NON-PENDING LETTER vs. RUNNING A PENDING LETTER
- HOW TO USE THE RESULTS OF RUNNING MULTIPLE POPULATIONS SELECTIONS RELATED BY UNION/INTERSECTION/MINUS AS ONE OF THE POPULATION SELECTIONS IN SUBSEQUENT UNION/INTERSECTION/MINUS POPULATION SELECTIONS
- TABLES WHERE POPULATION SELECTION AND VARIABLE RULES RESIDE
- DELETING PARAMETER SETS

POPULATION SELECTION AND LETTER GENERATION TRAINING:



FORMS REVIEWED AND/OR USED BY THE ALL PARTICPANTS:

Note: I reviewed Banner form naming conventions.

Letter Forms for setting up a Banner letter and Banner paragraphs

GTVLETR
GTVPARA
GUALETR
GUAPARA

Population Selection Forms

GLRSLCT
GLIEXTR
GLAEXTR
GLISLCT

Other Forms

GJAPCTL
GJIREVO

Processes for running Banner Population Selections and Letter Generation

GLBDATA
GLBLSEL
GLRLETR

ADDITIONAL FORMS REVIEWED AND/OR USED

Forms for creating and/or viewing Banner Objects

GLIOBJT
GLROBJT

Forms for creating and/or viewing Banner Applications

GLRAPPL
GLIAPPL

Forms for creating and/or viewing Banner Variables

GLRVRBL
GLIVRBL

Additional Forms

GJAPDEF -- for managing the parameters for Banner processes

Additional Processes

GLBPARM - for running the program to recompile Banner applications
GURPDED - for producing a data element dictionary

Some users created new Banner letter and paragraph codes (GTVLETR, GTVPARA), added variables to the paragraphs (GUAPARA) and added paragraphs to letters (GUALETR). They did this following my examples and then entirely on their own.



ADMISSIONS CONSULTING:

The majority of letters are sent using the legacy system. Some are sent via Banner Comm Plans. They have not used pop sel to select people to get letters. Now they want to use pop sels for some letters.

They want to review their decision codes.

The new plan: apps with missing docs will be accepted if they can be and will be sent the appropriate letter. Later, if their docs are not acceptable, their SGASTDN record will be inactivated and they will be sent a new decision letter with the reject message.

Students who have been accepted have a SGASTDN record. Some of these may subsequently be denied when their final documents have been received. They do not want to delete any SGASTDN records. Chrissie was concerned about how that fact is indicated in Banner. Currently they think to use a denial letter, visible on SUIAMAIL. I suggested that using the mail form to track decisions is not the best use of that form and that they should try using the decision form. I added a REJECT decision code to someone who had been accepted and who had a student record. Banner accepted that decision code. Therefore on both SAADCRV and SAAADMS, the most recent decision is REJECT. The SGASTDN record still shows a student status of AS. That would have to be changed manually.

Accepted people with missing credentials	pop sel done	ACCEPTED_MISSING_DOCS
Accepted people with missing credentials who have registered Dean's letter	pop sel done	ACCEPTED_MISSING_DOCS_REG
	Created in 2006; Sue will update The WORD UA_DEAN_LETTER_MASTER with new college codes. Sue will change the Comm Plan ADAP to use ONE dean letter material instead of the several the plan now uses. They will not implement this until they enter the new curriculum into Banner	Does not use pop sel. Uses Comm Plan
APP FILE LABEL AND WORKSHEET	Currently they use two BANNER materials and letters and two sets of processes. We can combine these, and they will merge the same data twice, once to a label, and once to the worksheet. This saves time and effort. I created a variable to show ALL checklist items and the received date for those that have been received. We removed the material APFL	Does not use pop sel. Uses Comm Plan
HS students with certain	Pop sel done	SPECIAL_GROUPS



attributes

Denied apps who have registered Pop sel done

DENIED_REG

R & R PROJECTS:

Registration holds	Past due balance >= 300 There is NO hold = OV They will remove the OV hold after each term, so the only people who have that hold are the current people they want to exclude.	DONE
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Not yet registered	Eligible to register, but have not yet registered	DONE
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Grade Notification	Email to all who have received grades	DONE
Registered and suspended	Suspended students who are registered for a specific term	DONE

AR PROJECTS

Note: YSU has created a view SYVBALN to calculate SUM(TBRACCD_BALANCE). This view is used in many of these processes.

Final letter	Have a C1 hold	DONE	
Collection review	Have a C hold Payment or charges on a specific date	DONE	
Perkins	Have Perkins indicator Have fewer than six credits	They will not be using these results in Banner. I suggest they develop a report in Web Focus	Need view to calculate credit hours. Could use a field that shows the date on which they dropped below 6



Billing to run TSRCBIL- have loan	Balance greater than \$50 ONLY someone with a student record Living Do not have the C holds Have a loan Exclude people billed within a selected month	They will rethink billing. I suggest they develop a view to be used in this pop sel
Billing to run TSRCBIL- no loan	Balance greater than \$50 ONLY someone with a student record Living Do not have the C holds Do not have a loan Exclude people billed within a selected month	They will rethink billing. I suggest they develop a view to be used in this pop sel
Financial Suspension	People who have a balance AND have not made a payment for the current term	DONE

Comm Plans add letters to the mail for as 'pending' if they match rules set up by the user. The letter generation steps are slightly different for pending letters. I have included this chart showing the differences. Users may want to keep this comparison for review in the future.

COMPARISON: RUNNING A BANNER POPULATION SELECTION AND A NON-PENDING LETTER vs. RUNNING A PENDING LETTER					
	Population Selection Banner Letter Generation Processes			The mail form BEFORE you run the processes	The mail form AFTER you run the processes
For a Population Selection and a non-pending letter	GLBDATA Specify the name of the Population Selection, the Creator ID and Banner Application	GLBLSEL Respond 'NO' to the parameter 'Pending Letters' Specify the name of the Population Selection, the Creator ID, the user ID and Banner Application Specify the name of the Banner Letter	GLRLETR Specify the name of the Banner Letter you just used when you ran GLBLSEL	No entry for the Letter Code exists on the mail form	Their mail form will be updated: <ul style="list-style-type: none"> The letter code you used when you ran GLBLSEL and GLRLETR will be added to the mail form The 'Date Initiated' field will be filled in with the date you ran GLRLETR The 'Date Printed' field will be filled in with the date you ran GLRLETR
For a Pending Letter (whether added manually or automatically by a Banner Communication Plan)	Not necessary. Start with GLBLSEL ↑	GLBLSEL Respond 'YES' to the parameter 'Pending Letters' Specify the Banner Application Leave the name of the Population Selection, the Creator ID, the user ID BLANK ↑ Specify the name of the Banner Letter	GLRLETR Specify the name of the Banner Letter you just used when you ran GLBLSEL	An entry exists for the Letter code on the mail form because the letter is 'pending' <ul style="list-style-type: none"> The 'Date Initiated' field has a date in it The 'Date Printed' field is <u>empty</u> 	The entry for the letter code for the pending letter you used when you just ran GLBLSEL and GLRLETR will be updated: <ul style="list-style-type: none"> The 'Date Printed' field will be filled in with the date you ran GLRLETR

Attendees copied variables from the ADMISSIONS application to the STUDENT application.

I demonstrated how to use a population selection that results from a UNION, INTERSECTION or MINUS in other UNION, INTERSECTION or MINUS operations. Such a resulting population has no rules to run on GLBDATA, so it is necessary to create a 'translator' population selection (often called a 'pop out') that uses the information in the pop sel results to return a PIDM that can be used in subsequent UNION, INTERSECTION or MINUS operations. See the process for the OB_300_NO_HOLD.

I also demonstrated how to accomplish the above by using a sub query. See the population selection NOT_YET_REGISTERED_EXAMPLE in the STUDENT application.

TABLES WHERE POPULATION SELECTION AND VARIABLE RULES RESIDE

I created population selections and variables for the processes. All these will have a date of July 12 or 13. Do NOT copy the variables in the STUDENT application that begin with *CC_.

The tables that store population selection rules data are:

- GLBSLCT
- GLRSFRM
- GLRSLCT

The tables that store VARIABLE rules data are:

- GLBVRBL
- GLBVFRM
- GLRVRBL

HOW TO USE THE RESULTS OF RUNNING MULTIPLE POPULATION SELECTIONS RELATED BY UNION/INTERSECTION/MINUS AS ONE OF THE POPULATION SELECTIONS IN SUBSEQUENT UNION/INTERSECTION/MINUS POPULATION SELECTIONS

You can create a new set of population selection results by running two population selections simultaneously and relating them via UNION, INTERSECTION or MINUS.

A new population selection produced this way contains results (that is, PIDMs), but has no rules to run on GLBDATA. To use these results as one of the population selections in subsequent UNION, INTERSECTION or MINUS operations it is necessary to create a 'translator' population selection (often called a 'pop out') that uses the information in the pop sel results to return a PIDM.



Example:

You have created two pop sels, POP_SEL_1 and POP_SEL_2, created by SAISUSR and in the ADMISSIONS APPLICATION. (Of coursed your pop sels could have other names; I am using these for clarity.) You want to create a NEW set of results called POP_SEL_1_MINUS_2. It will contain the people in POP_SEL_1 except for any who are also in POP_SEL_2

Selection ID 1 = POP_SEL_1
Selection ID 2 = POP_SEL_2

When running GLBDATA you would use POP_SEL_1 as Selection ID 1 and POP_SEL_2 as Selection ID 2
NEW SELECTION ID = POP_SEL_1_MINUS_2 (You can create this name on the fly when running GLBDATA)

POP_SEL_1_MINUS_2 would be produced by choosing the MINUS operation. (Of course you could also use the UNION or INTERSECTION choices to get different results).

It is created by SAISUSR, run by the user SAISUSR, and in the ADMISSIONS application, just as are POP_SEL_1 and POP_SEL_2.

POP_SEL_1_MINUS_2 contains results (that is, PIDMS) and so can be used in any process that calls for pop sel results, such as GLBLSEL. However, POP_SEL_1_MINUS_2 does not contain any RULES, so it cannot be 'RUN' as one of the population selections in UNION, INTERSECTION or MINUS operations to produce yet another NEW set of results.

To use the PIDMs in POP_SEL_1_MINUS_2 you will create a 'pop out' or 'translator' pop sel to reference the information for the pop sel POP_SEL_1_MINUS_2 stored on the GLBEXTR table.

ADMISSIONS	POPOUT_EXAMPLE	SAISUSR		
SELECT	SPRIDEN_PIDM			
FROM	SPRIDEN, GLBEXTR			
	GLBEXTR_KEY	=	SPRIDEN_PIDM	AND
	GLBEXTR_APPLICATION	=	'ADMISSIONS'	AND
	GLBEXTR_SELECTION	=	'POP_SEL_1_MINUS_2'	AND
	GLBEXTR_CREATOR_ID	=	'SAISUSR'	AND
	GLBEXTR_USER_ID	=	'SAISUSR'	

To use this in further procedures to say remove the PIDMS in, say POP_SEL_4, from POP_SEL_1_MINUS_2 to produce POP_SEL_5 you would run GLBDATA as follows:

POPOUT_EXAMPLE (which gets the PIDMs in POP_SEL_1_MINUS_2)
POP_SEL_4



Use the two pop sels above to create a NEW result, POP_SEL_5.

When running GLBDATA you would use POP_OUT EXAMPLE as Selection ID 1 and POP_SEL_4 as Selection ID 2
The NEW result POP_SEL_5 would be produced by choosing the MINUS operation.

I suggest you use a generic 'pop out' pop sel whenever you need to do the above. This generic pop sel would look like the following and could be used to get the PIDMs from any pop sel.

ADMISSIONS	POPOUT_EXAMPLE	SAISUSR		
SELECT	SPRIDEN_PIDM			
FROM	SPRIDEN, GLBEXTR			
	GLBEXTR_KEY	=	SPRIDEN_PIDM	AND
	GLBEXTR_APPLICATION	=	&APPLICATION	AND
	GLBEXTR_SELECTION	=	&SELECTION_ID	AND
	GLBEXTR_CREATOR_ID	=	&CREATOR_ID	AND
	GLBEXTR_USER_ID	=	&USER_ID	

DELETING PARAMETER SETS

These are the known steps to delete a parameter set.

You can see everyone's parameter sets in this process, but can only access/change your own items

OVERVIEW:

You will go to GJRJPRM and delete EACH parameter in the PARAMETER SET you choose.

When all the parameters in that PARAMETER SET have been deleted then, AND ONLY THEN, can you delete the parameter set.

DETAILS:

GO TO GJRJPRM

PUT YOUR CURSOR ON THE PARAMETER SET YOU WANT TO DELETE

GO TO OPTIONS



SELECT MODIFY DEFAULTS
THAT WILL TAKE YOU TO GJAPDFT
GO TO PARAMETER 1
SEE THE DEFAULT VALUE FOR THAT PARAMETER IN THE USER VALUE
RECORD REMOVE THAT VALUE
GO BACK UP TO THE NEXT PARAMETER
SEE THE DEFAULT VALUE FOR THAT PARAMETER IN THE USER VALUE
RECORD REMOVE THAT VALUE
CONTINUE FOR ALL PARAMETERS THAT HAVE USER VALUES
SAVE
GO BACK TO GJRJPRM
DELETE THE PARAMETER SET NAME

Decisions Made and/or Actions Taken:

Action Items and/or Assignments for Youngstown State University				
Date Assigned	Description	Owner	Critical Date for Completion	Status



2007-07-13	Review all previously assigned Action Items listed in the trip report for the visit of July, 2006 and	ALL	August 15, 2007 or next student consultation, whichever comes first	NEW
2007-07-13	Develop a procedure to periodically clean the GLBEXTR, table that collects population selection results	TBD	August1, 2007	NEW
2007-07-13	Develop a view to facilitate selection people with or without loans for running TSRCBIL	TBD	August1, 2007	NEW
2007-07-13	Develop a view to sum the credits registered for	TBD	August1, 2007	NEW
2007-07-13	Review with Student functional consultant all the solutions we developed	Each office	Next Student consultation	NEW
2007-07-13	Test all processes developed during this consultation	Admissions, R&R, AR	August 1, 2007	NEW

Previously Assigned Action Items and/or Assignments for Youngstown State University				
Date Assigned	Description	Owner	Critical Date for Completion	Status
2006-07-20	Develop a the campus naming convention and apply it to Banner letters and paragraphs	ALL	Next Student consultation	DONE
2006-07-20	Decide what rules will be used to distinguish variables pulling GR NDG and GR NDG and UG information.	TBD	Next Student consultation	OPEN



2006-07-20	Review the Communication Plans that have been created to see what letters can be combined and managed by a WORD merge.	ALL	ASAP	DONE
2006-07-20	Develop CHAIR letter based on the model of the DEAN letter	Sue	August 10	OPEN
2006-07-20	Develop COLLEGE FAIR VISIT letter based on the model of the HS INVITE letter	Sue	August 10	OPEN
2006-07-20	Review the SCT training materials for population selection and letter generation that are referenced in the agenda. These will give additional examples of these processes.	ALL	ON-GOING	UNKNOWN
2006-07-20	Add Admit Type A2 where required	Sue	Next Student consultation	DONE
2006-07-20	Determine if GR will use the comments on the application form to record conditions for graduate applicants	Tina	Next Student consultation	UNKNOWN
2006-07-20	Decide whether the current Banner applications will serve the needs of YSU. If not, then decide what additional Banner applications should be created and if they should have rules at the Banner application level. Use the form GLRAPPL to see the delivered application RECRUITING for an example of an application with rules. See the applications STUDENT or GENERAL for examples of applications without rules.	TBD	ASAP	OPEN
2006-07-20	Review the documentation for setting up or changing new Banner applications	Tech staff	ASAP	OPEN



2006-07-20	Review the documentation for the process GLBPARM, required to recompile variables and population selections if and when Application rules are changed for applications that already have population selections and variables connected to them.	Tech staff	ASAP	OPEN
2006-07-20	Review the Reports section of user documentation for each module to see which Reports permit/require the used of a Banner Population Selection	ALL	ASAP	OPEN
2006-07-20	Decide for each office who will be responsible for creating Banner population selections and Banner letters and who will need just the skills to be able to run these	ALL	ASAP	OPEN
2006-07-20	Use the Banner process GURPDED to produce needed data element dictionaries. This can be run for specific tables, or, by using the wildcard, for selected groups of tables	TBD	ASAP	ON GOING
2006-07-20	Review the documentation for the processes SURLOAD (to add letter codes to the mail form as if they had been generated by Banner Letter Generation) and SURDELT (to delete letter codes from mail forms).	TBD	ASAP	OPEN
2006-07-20	Review individual class notes, and work with other attendees to improve the notes.	ALL	ASAP	UNKNOWN



2006-07-20	Continue to develop a list of letter projects for each office in preparation for mapping these to the appropriate solution. Create a list of the 'outputs' (letters, labels, etc.) for each project...The projects should include the data they need from Banner, the criteria that determine who gets each letter and an example of the WORD text. Clearly describe how often the letters go out and any other conditions.	Admissions, Graduate Admissions, Registrar and Records	ASAP	OPEN
2006-07-20	Consider scheduling additional letter consulting time for other offices.	Project Manager	ASAP	OPEN

Status: New, Open, Completed, Cancelled, Deferred

Previous Concerns/Decisions to be made

Description	Owner	Target Date for Closure	Action Plan
Some GR applicants do not complete the requirements, but they want to start classes. Currently YSU changes the degree to non-degree IN THE SAME application. That means at any one time they have ONE application only. In Banner they have not yet decided how they will operate. It is possible that someone may have TWO apps for the same term, one for NON-DEGREE and one for	GR Studies and Lee Cipolla	Next Student Consultation	Review policies.



<p>DEGREE. Apps who have an UG app and a GR app for the same term are not a problem because there is an easy way to distinguish them: level. I suggest YSU work with Lee to determine how they will handle GR apps who have a degree and a non-degree app in the same term . In addition, there are Workshop students, who are also non-degree.</p>			
How will Workshop students be identified.	Graduate Studies and Lee Cipolla	Next Student Consultation	Review policies.
How will requests for generic information be tracked? Will YSU use CONTACTS?	UG Admissions and Lee Cipolla	Next Student Consultation	Look at alternatives.
How to identify current juniors and seniors who inquire?	UG Admissions and Lee Cipolla	Next Student Consultation	Look at alternatives.

Other

Many users who attended my training and consultation of July 2006 do not remember having received copies of that trip report. I urge YSU to distribute my trip reports to all who attend my sessions.

Users may find this trouble-shooting guide helpful.

TROUBLE SHOOTING POPULATION SELECTION CREATION	
The Population Selection won't compile	
Question to ask yourself	Solution and/or Approach



Is the population correctly defined, that is, does it makes sense?	Look again at your tables and data elements. Is this the data you want to pull? Check on GLRSLCT that these are the data elements you included in your pop sel.
Did you use values that do not exist? Did you key in value using the proper case for your values?	Check the values in your system.
Are you sure there are people in the system with those values ?	Check your data.
Are your population selection rules correct? Look at the ' OPERATOR ' column	Review your rules for the Population Selection on GLRSLCT
Are your population selection rules correct? Look at the ' AND/OR ' column	Review your rules. for the Population Selection on GLRSLCT
Are your population selection rules correct? Look at the PARENTHESES columns	Review your rules for the Population Selection on GLRSLCT.
Did you write/run the selection rules in the correct Banner application?	Review the key block for the Population Selection on GLRSLCT.
Did you use a correct combination of APPLICATION, SELECTION ID (Population selection name), CREATOR ID	Review the key block for the Population Selection on GLRSLCT.
GLBDATA TROUBLE SHOOTING	
The Population Selection doesn't run, or takes forever to run	
Do the rules make sense?	Check with your technical people
Have you put a table on the FROM line that is not used in the rules?	Edit the FROM line to remove it
There are no results on GJIREVO	
Did you run a population selection that will HAVE results?	Look at your rules again on GLRSLCT
Did you wait long enough for the GLBDATA to run?	Give the system a few more minutes to complete the processes then look at GJIREVO again.
Did you forget to select DATABASE	Rerun GLBDATA, add database in Printer
I get the message 'Selection ID does not exists or has not been compiled'	
Be sure you use a combination of APPLICATION, SELECTION ID, CREATOR ID which actually exists	Look at what you keyed into GLBDATA and run it again
There are no results on GLAEXTR or GLIEXTR	
Did you wait for the process to finish running?	Give the system a few more minutes to write the results of your population selection to these forms, and then look at the forms again. OR Run it again and make sure that you see that the process had



	produced a file which you can see listed on GJIREVO
Results are specific to a combination of APPLICATION, SELECTION ID, CREATOR ID and USER ID. Did you check that the combination you are looking for is the combination you ran?	Look at the key block on GLIEXTR, GLAEXTR. Make sure you are looking for the combination of Selection ID, Application and Creator ID for the correct population selection
Sometimes it takes a long time for the results to be written to the table that collects them for display on GLIEXTR and GLAEXTR. This can happen if that 'collector table' is getting full.	Ask your technical staff to cleanse the collector table.
When you ran GLBDATA did use the combination of Selection ID, Application and Creator ID for the correct population selection?	Re-run GLBDATA and look and make sure these parameters are correct.
GLBLSEL TROUBLE SHOOTING	
GLBLSEL message: Application does not own a variable	
You get this message if the variable indicated in the message does not belong to the application you specify when you run GLBLSEL	Remove the variable from the paragraph it occurs in. (Yes, I know I have said that you should never remove a variable from a paragraph, but in this case, no letter using this paragraph containing this variable would ever run). If the variable rules will work in the application you are using, you can copy the variable into that application. If the rules look as if they will not work, then contact your technical staff to create a new variable.
GLBLSEL seems to run, but there are no results for anyone when you look at the error file	
Did you NOT check the DUPL column on GTVLETR? Only one letter per pidm per term can be produced if you do NOT check DUPL. If DUPL is NOT checked, then the process runs, but in the Error report produced by GLBLSEL will print the word 'duplicate' after each ID instead of 'printed'	Go to GTVLETR; see whether you checked DUPL. You can change it.
Did you forget to add variables to the paragraphs using GUAPARA or forget to add PARAGRAPHS to the LETTER using GUALETR?	Go to GUALETR and check 'View letter' on the side bar. If no variables appear then you must either add variables to the paragraphs (GUAPARA) or put paragraphs into the letter (GUALETR).
When you ran GLBLSEL did you use the correct Selection ID and Letter Code, Creator ID and User ID?	Re-run GLBLSEL and look and make sure these parameters are correct. Remember, CASE matters in the Letter Code.
If you can't find the results of GLBLSEL on GJIREVO	Give the system a few more minutes to complete the processes then look at GJIREVO again.



GLBLSEL seems to run, but there are no results at all for some people when you look at the error file	
Do the address types in your hierarchy exist for the PIDMS pulled by your Population Selection?	Look at the address information for some people in your population selection (GLAEXTR/GLIEXTR, SPAIDEN)
Are the address types you chose active on the date you entered into GLBLSEL?	Look at the address information for some people in your population selection (GLAEXTR/GLIEXTR, SPAIDEN)
Did you key in a meaningful address selection date ?	Look at your parameters on GLBLSEL.
When you ran GLBLSEL did you use the correct Selection ID and Letter Code, Creator ID and User ID ?	Re-run GLBLSEL and look and make sure these parameters are correct. Remember, CASE matters in the Letter Code.
There are no results for GLBLSEL on GJIREVO	
If you can't find the results of GLBLSEL on GJIREVO	Give the system a few more minutes to complete the processes then look at GJIREVO again.
GLBLSEL seems to run, but some variables do not pull information for some people when you look at the error file	
This could be normal. Some may not have that particular piece of information in their record	Look at their records to see if they have that information
The data exists in the person's record, but the variable is not pulling it.	Ask the technical people to review the rules with you
GLRLETR TROUBLE SHOOTING	
There are no results for GLRLETR on GJIREVO	
Did you wait to be sure that GLBLSEL had run before you ran GLRLETR?	Run GLBLSEL again, check that there are results on GJIREVO
When I look at my WORD file, there is no data in it	
When you ran GLRLETR did you use the same Letter Code you used when you ran GLBLSEL?	Re-run GLRLETR and look and make sure these parameters are correct. Remember, CASE matters in the Letter Code.
Did you run GLRLETR several times in succession without running GLBLSEL FIRST every time you run GLRLETR?	Run GLBLSEL again, make sure there are results, then run GLRLETR again.
Did you make sure there were results on GJIREVO for GLBLSEL before you ran GLRLETR?	Check GJIREVO OR RUN GLBLSEL again
LOOKING AT THE RESULTS: TROUBLE-SHOOTING	
If you can't find the results of GLBDATA OR GLBLSEL on GJIREVO	Give the system a few more minutes to complete the processes then look at GJIREVO again.
If you can't find the population selection results on GLIEXTR/GLAEXTR	Give the system a few more minutes to write the results of your population selection to these forms, then look at the forms again



If you can't find the population selection results on GLIEXTR/GLAEXTR	Check to be sure you are looking for the combination of APPLICATION, SELECTION ID, CREATOR ID, and USER ID that you ran.
DATA FILE TROUBLESHOOTING	
I can't find the data file (the .txt) file I saved	
Are you looking in the correct directory?	Check to see that you are in the proper directory.
Do you remember the name you gave the .txt file?	Keep track of your project.
WORD TROUBLESHOOTING	
I can't find the data file on the WORD side	
Did you save it to the correct location?	Check the directory to which you copied it.
Are you looking for the right file?	Check the name
The data in the merge file looks wrong when I merge it	
Are you sure you merged with the correct data file?	Check to see that you are merging with the correct data file
Did you have the WORD merge file OPEN when you saved the .txt file?	Re-link the merge document with the merge data file.
When I look at my WORD file, there is no data in it	
Are you sure you merged with the correct data file?	Re-link the merge document with the merge data file.
Some records are missing data	
You may not have waited for GLBLSEL to finish before you ran GLRLETR.	Re-run the two processes, waiting to be sure that GLBLSEL has run
This could be normal. Some may not have that particular piece of information in their record	Look at their records to see if they have that information
The data exists in the person's record, but the variable is not pulling it.	Ask the technical people to review the rules with you

I suggest that they consider the following steps as they develop and produce their plan for communicating. Some of these steps can occur concurrently, several can involve additional consulting time. Note that some of consultation sessions could be done remotely.

Communication Analysis

	STEP	WHO
1	<p>NAME THE PROCESS</p> <ul style="list-style-type: none"> • Think of their communication needs in terms if stages, processes or projects. Examples would be: <ul style="list-style-type: none"> ○ Responding to an inquiry, ○ Following up an inquiry ○ Sending a decision • Describe each process, including: <ul style="list-style-type: none"> ○ How often they do it ○ When they do it ○ How the process works in the office ○ Who does it 	<p>Functional staff Decision makers</p>
2	<p>DEFINE OUTPUT</p> <ul style="list-style-type: none"> • Think of the output they might need for each process. Examples could be: <ul style="list-style-type: none"> ○ Letter ○ Envelope Label ○ File folder label ○ File folder cover sheet • Assemble all their letters and other output for each process • Review each letter to determine if they are in fact quite different, or simply slightly different versions of the same message 	<p>Functional staff Decision makers</p>
3	<p>COMMUNICATION PROCESS ANALYSYS</p> <ul style="list-style-type: none"> • Map those letters to specify the conditions that determine which person receive each output 	<p>Functional staff Decision makers Consultant on campus or remotely</p>
4	<p>DECIDE ON A METHOD</p> <ul style="list-style-type: none"> • Population selection, Letter Gen • Banner Communication Plans • Other 	<p>Consultant on campus or remotely Decision makers</p>



	STEP	WHO
5	TRANSLATE THE DATA NEEDS TO WORD FIELDS NEEDED TO DISPLAY IN THE LETTER <ul style="list-style-type: none"> • List the information they will require from Banner for each output. In addition to address and named information, other examples could be such information as: <ul style="list-style-type: none"> ○ Preferred name ○ Prefix ○ Suffix ○ ID ○ List of conditions ○ Major ○ Term description ○ Student type ○ Missing checklist items ○ Received checklist items ○ High school or prior college name 	Functional staff Consultant on campus or remotely
6	TRANSLATE THE DATA NEEDS TO WORD FIELDS NEEDED FOR THE LOGIC (IF ANY)	Consultant on campus or remotely
7	CREATE VARIABLES IN BANNER	Consultant on campus or remotely Technical
8	BANNER SET UP AND PROCESSES: <ul style="list-style-type: none"> ○ Banner Letter ○ Banner paragraphs ○ Communication Plans ○ Population selections ○ GLBDATA ○ GLBLSEL ○ GLRLETR 	Consultant on campus or remotely
8	WORD LOGIC set-up	Consultant on campus or remotely
10	ENTER SAMPLE REAL DATA INTO BANNER	Functional staff
11	TEST VARIABLES	Consultant on campus or remotely
12	TEST WORD LOGIC	Consultant on campus or remotely
13	PROVIDE REALTEXT FOR WORD DOCUMENTS INVOLVED	Functional staff

NEXT CONSULTATION: None currently scheduled

I suggest that YSU consider scheduling additional time for letter consulting. This could be done as a remote Virtual Classroom. The VC methodology offers even more flexibility than an on-campus visit. Sessions can be scheduled for Monday and/or Friday as well as the usual Tuesday-Thursday schedule. Attendees can sign in from their own work stations. We can break for me to develop solutions while they return to their usual tasks, and then reconvene periodically to test results. They can also see what is on my own laptop screen as if I were on campus.



Supplemental Documents Previously Sent

Sample code for creating a view to SUM(TBRACCD_BALANCE)

Sample code for creating a view to sum the number of credits hours registered for

Attached

I have attached a zip file containing the following

- An updated Excel spreadsheet containing the details of the processed developed during this consultation
- A partial list of delivered Banner views: VIEWS-Banner S and T views list.xls, VIEWS - S_V_Views with descriptions.xls
- Instructions for loading PIDMs into the pop sel table GLBEXTR
- Evaluation Sheet

Hours Billed:	
Preparation	2
Travel	8
On-Site Consulting	24
Follow-Up	2.5
TOTAL	36.5