

The logo features the word "SUNGARD" in white, bold, uppercase letters on a black background. To its right, the words "SCT HIGHER EDUCATION" are written in white, uppercase letters on a dark blue background. The entire logo is positioned on a horizontal bar that also includes a grayscale image of a classical column on the left and a gray rectangular area on the right.

SUNGARD SCT HIGHER EDUCATION

SCT Banner Advancement Population Selection Training Workbook

January 2005

Release 7.0

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Section A: Introduction

Lesson: Overview

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Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to accurately run population selections at your institution. This workbook is divided into four sections:

- Introduction
- Set Up
- Day-to-Day Operations
- Reference

Intended audience

Advancement Office Staff

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Section A: Introduction

Lesson: Process Introduction

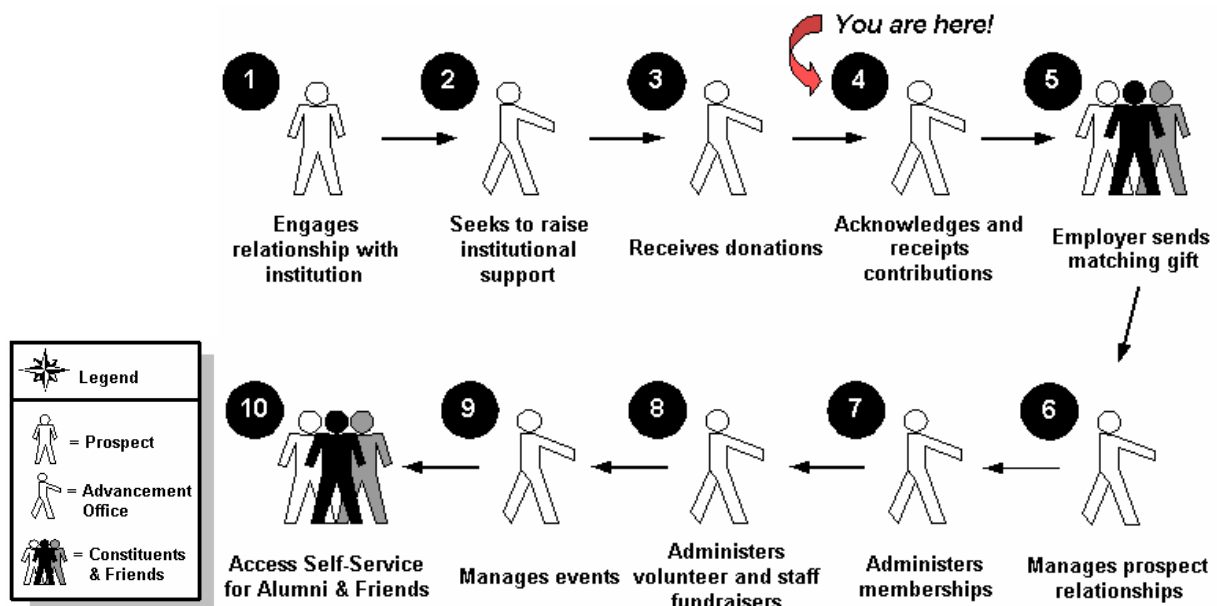
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Introduction

The Population Selection module lets you identify and group entities in the database (for example, people, vendors, and organizations). You can define selection criteria to identify and extract a subset of these entities to use in SCT Banner reports, processes, and letters.

Flow Diagram

This diagram highlights the processes used within the Banner Advancement System.



About the process

You can use Population Selection when you need to extract data from Banner.



Section A: Introduction

Lesson: Population Selection Overview

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The basics of Population Selection

SCT Banner Population Selection is a mechanism for selecting a group of people or organizations, which share common data, based on specific criteria. For example, because SCT Banner stores a person's gender and address, a user can select all of the people in the database who are male and have an address in New York State. Because SCT Banner stores a great deal of information, it makes it possible to select groups using simple and complex criteria.

To understand Population Selection, it is helpful to understand how Banner stores information. The Oracle database (which is the basis of SCT Banner) is made up of tables and rows much like a spreadsheet. For example, view the table below.

Table example

Last Name	First Name	Middle Name	ID
Spaulding	John	Forrest	578688818
Smith	Mary	Therese	003525454
Williams	Tom	Mitchell	952854785

Note: All of the last names are stored in the first column, and all of the information about John Forrest Spaulding is stored in one row, or record.

Tables and PIDMs

To store the vast amount of data used by SCT Banner clients, the system has thousands of tables. For example, the table SPRIDEN stores name and ID information (e.g. last name, first name, prefix, suffix, etc); the table SPRADDR stores address information, and the table SPBPERS stores personal information (e.g., sex, birth date, and ethnicity).

To ensure that the information on a specific record in one table is connected to the correct record in another table, Banner uses a field, called PIDM, which has the same value for a record in every table. Every time a new person or non-person is added to the system, SCT Banner generates a unique PIDM. This number is used for every record in every table that pertains to the person created.



Section A: Introduction

Lesson: Population Selection Overview (Continued)

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Table example with PIDM

Look at that table again, but this time with the PIDM column added:

PIDM	Last Name	First Name	Middle Name	ID
0000001	Spaulding	John	Forrest	578688818
0000002	Smith	Mary	Therese	003525454
0000003	Williams	Tom	Mitchell	952854785

Address table

Now let's look at another table, the address table:

PIDM	Street	City	State	ZIP
0000001	1 Main Street	Henniker	NH	03242
0000002	2 Elm Street	Dearborn	MI	51245
0000003	3 Beech Street	New Durham	NH	03454

To display name and address information for Mary Smith, SCT Banner can connect the two records using the PIDM. Thus, Mary Smith lives at 2 Elm Street, Dearborn, MI 51245.

Note: Every table in SCT Banner that contains information about a person or non-person uses the PIDM to identify the record.



Section A: Introduction

Lesson: Selecting Records in Banner Using SQL

◀ [Jump to TOC](#)

Overview

SCT Banner uses a SQL (Structured Query Language) to ask for information from the database.

An SQL statement is composed of three parts:

- SELECT clause
- FROM clause
- condition or WHERE clause.

For example, to get the last names of everyone living in New Hampshire, a user would ask

- the LAST NAME
- from the NAMES and IDS table and the ADDRESSES table
- where the STATE is New Hampshire

Or, in SQL:

- SELECT LAST NAME
- FROM NAMES & IDS, ADDRESSES
- WHERE STATE = 'NH'

Note: Both tables are mentioned in the **From** clause because one is for selecting from and the other uses the conditions. The user surrounds the letters *NH* in single quotes. This tells SCT Banner that it should look for the literal value *NH* in that field

Note: SQL is literal and case-sensitive.



Section A: Introduction

Lesson: Selecting Records in Banner Using SQL (Continued)

◀ Jump to TOC

The result of our query would be:

- Spaulding.
- Williams.

Of course, SCT Banner tables can be more complex, with complicated names. Note that SCT Banner field names have no spaces (use underlines to connect words), and they always begin with the table name (for example, SPRIDEN_ID and SPRADDR_STAT_CODE). If this were a real SCT Banner query, it would use the field and table names from SCT Banner. The result would look like this:

```
SELECT spriden_last_name
FROM spriden, spraddr
WHERE spraddr_stat_code = 'NH'
```

Note: Finding table and field names in SCT Banner are found by selecting the field that you want to pull information from and selecting Dynamic Help Query, or by putting your cursor in the field and shift-double-clicking. The base table name is contained in the Block: entry and the field name is contained in the Field: entry.



Section A: Introduction

Lesson: Using Conditions in SQL

◀ Jump to TOC

Overview

Some statements may require more than one condition. For example, you may get a request for “the last names of all the males from Massachusetts.” The statement would look like this:

```
where spbpers_sex = 'M' and  
spraddr_stat_code = 'MA'
```

Clauses joined by *and* mean that the record must meet all the conditions. Another option is *or*. A request for “the last names of everyone from Massachusetts *or* Connecticut would read:

```
where spraddr_stat_code = 'MA' or  
spraddr_stat_code = 'CT'
```

Now the record only has to meet either condition, not both.

By combining *and* and *or*, the data can be manipulated, but the user must be careful. Consider the request for “last names of all males from Massachusetts *or* Connecticut.” It might incorrectly be assumed that the statement would be written:

```
select spriden_last_name  
from spriden, spraddr, spbpers  
where spbpers_sex = 'M' and  
spraddr_stat_code = 'MA' or  
spraddr_stat_code = 'CT'
```

Unfortunately, the results are wrong because Banner interpreted the request as “the last names of all males from Massachusetts *or everybody* in Connecticut! In other words, Banner combined the first two lines of the where clause and kept the third line as a separate condition.

SCT Banner can be told to combine portions of a where clause by using parenthesis:

```
select spriden_last_name  
from spriden, spraddr, spbpers  
where spbpers_sex = 'M' and  
(spraddr_stat_code = 'MA' or  
spraddr_stat_code = 'CT')
```



Section A: Introduction

Lesson: Using Conditions in SQL (Continued)

◀ Jump to TOC

Often, the information wanted requires more flexibility than simply saying that a value equals some other value. You may want to identify individuals whose state *equals* PA, and their ACT composite score is greater than 25 or their zip code is between 19131 and 19355

SCT Banner provides many of these operators, including:

- equals
- not equals
- in
- not in
- like
- not like
- between
- is null
- is not null.

Example: The statement above could be written like this:

```
select spriden_last_name
from spriden, spraddr,, sortest
where spraddr_stat_code = 'PA' and sortest_tesc_code = 'A05' and
      (sortest_test_score > 25 or spraddr_zip between '19131' and
      '19355')
```

In this case, the last line provides a list for SCT Banner to choose from.

Note: The word null has a special meaning in SQL; it means the field has nothing in it. That is different from having 0 (zero) in it, as zero is a value.



Section A: Introduction

Lesson: Using Conditions in SQL (Continued)

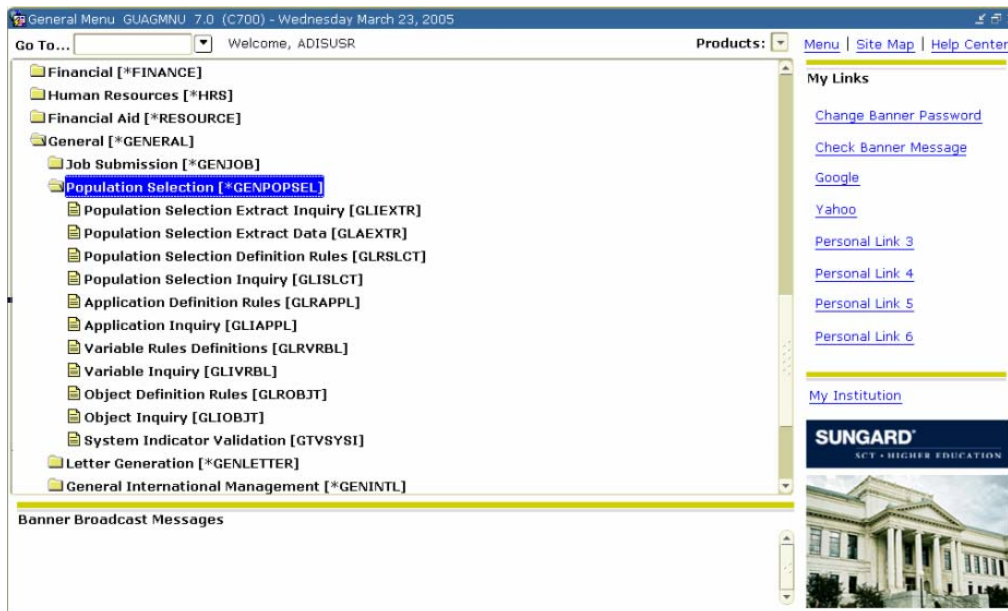
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The Population Selection process only selects IDs (actually PIDs); you cannot use it for selecting campaign, designations or any other information. Only PIDs can be selected and only persons or non-persons have PIDs.

Population Selection involves three processes. You define your population, you run the Population Selection Extract Program, and you view and edit the results of your selection.

Population Selection Menu

The Population Selection menu can be found under the GENERAL system menu.





Section A: Introduction

Lesson: Terminology

◀ [Jump to TOC](#)

Application

The Application Code field is used to enter the application for which the selection is being defined. Standard applications are the SCT Banner systems: Alumni, Finance, Human Resources, Financial Aid and Student.

Note: This is required to run the process.

Selection ID

The selection field contains the name of the selection being defined. No spaces are allowed; use the underscore key to link words together.

Note: This is required to run the process.

Creator ID

The name of the user who created the selection being defined.

Note: This is required to run the process.

Data Element

Database column name to be used as part of the rules statement (the field name or data you wish to extract).

Operator

The operator equals (=), less than (<), greater than (>), etc. are to be used as part of the rules statement.

Value

The value to be compared (literal text, date value, number, another column or a sub query) as part of the rules statement. If literal, then it must be between single quotes.

Variable

A specific piece of data in the database and the set of rules used to select that data.

Dynamic Parameter

A parameter that allows you to enter a different distinct value every time you utilize the rule in which it was created.



Section B: Set Up

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to outline the set-up process and detail the procedures to select data from the data tables underlying the SCT Banner Advancement system.

Intended audience

Advancement Office employees.

Objectives

At the end of this section, you will be able to set up rule and validation forms that will allow you to complete the day to day population selection process.

Prerequisites

To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the SCT Banner system.

Learners should also have some SQL knowledge or have experience in a third party data selection tool such as Bio Query, MS Access or Crystal Reports.

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Section B: Set Up

Lesson: Defining Applications

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Introduction

The Application Definition Rules Form (GLRAPPL) is used to define the rules that an application will use *every time* a population selection is created using the application code. Standard applications are the Banner systems: Alumni, Finance, Human Resources, Financial Aid and Student.

You can create multiple application rules for a system. For example, you can create an application rule that will drop non-alumni from any population selection that is created under this code. This frees everyone who creates populations under this code from having to specify one or more donor categories in their rules. You can create another application that has no rules for use when you want to control selection through population selection rules.

How to complete

This will show you how to define a simple application with no Application level rules

You are ready to begin defining and testing Population Selection rules. You want to define an application for your personal testing use. You must first determine whether an application exists with the code you wish to assign to your application then you can create your application.

Step	Action
1	<p>Access the Application Definition Rules Form (GLRAPPL).</p> <p>The screenshot shows the GLRAPPL form with the following fields: Application: ALUMNI, Description: BANNER Alumni/Development, System: A, and a Delete All checkbox. Below these is the Application Level Rules table with columns for Data Element, Operator, Value, and AND/OR.</p>
2	Click the Search icon for the Application field to view the List of Values.
3	Review the list of applications already defined.



Section B: Set Up

Lesson: Defining Applications (Continued)

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Procedure, continued

Step	Action
4	Assume that no application exists for this lesson. Click Cancel to return to GLRAPPL.
5	<p>In the Application field, enter an application code using your last and first initial followed by the characters APPL.</p> <p>Example: Mary Smith would enter <i>MS_APPL</i>.</p> <p><u>Note:</u> Each participant must create a unique code.</p>
6	Perform a Next Block function.
7	<p>In the Description field, enter a description for your application.</p> <p>Example: Mary Smith's Application</p>
8	Double-click in the System field to display a List of Values for system indicators.
9	<p>Select an appropriate value.</p> <p>Example: A—Alumni Development</p> <p><u>Note:</u> The System field identifies the Banner System associated with the application.</p>
10	Leave the Application-level rules block empty.
11	Click the Save icon.
12	Click the Exit icon.



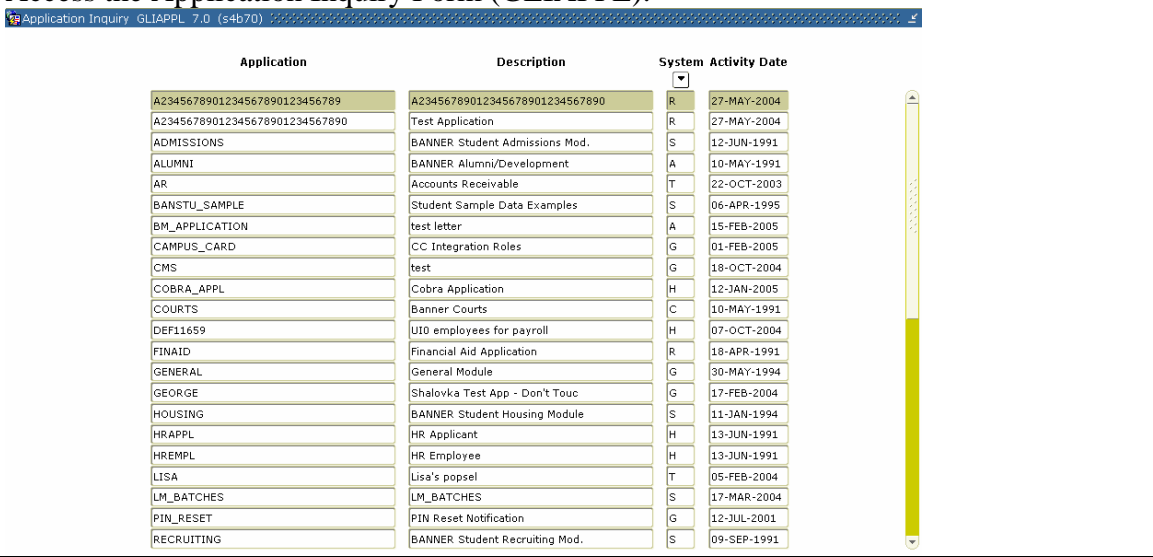
Section B: Set Up

Lesson: Defining Applications (Continued)

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Application Inquiry Form

Access this form to make sure that the application you just created was saved.

13	<p>Access the Application Inquiry Form (GLIAPPL).</p>  <p>The screenshot shows a web browser window titled "Application Inquiry - GLIAPPL 7.0 (s4b70)". The main content is a table with the following columns: Application, Description, System, and Activity Date. The table contains 25 rows of application data.</p> <table border="1"> <thead> <tr> <th>Application</th> <th>Description</th> <th>System</th> <th>Activity Date</th> </tr> </thead> <tbody> <tr><td>A2345678901234567890123456789</td><td>A23456789012345678901234567890</td><td>R</td><td>27-MAY-2004</td></tr> <tr><td>A23456789012345678901234567890</td><td>Test Application</td><td>R</td><td>27-MAY-2004</td></tr> <tr><td>ADMISSIONS</td><td>BANNER Student Admissions Mod.</td><td>S</td><td>12-JUN-1991</td></tr> <tr><td>ALUMNI</td><td>BANNER Alumni/Development</td><td>A</td><td>10-MAY-1991</td></tr> <tr><td>AR</td><td>Accounts Receivable</td><td>T</td><td>22-OCT-2003</td></tr> <tr><td>BANSTU_SAMPLE</td><td>Student Sample Data Examples</td><td>S</td><td>06-APR-1995</td></tr> <tr><td>BM_APPLICATION</td><td>test letter</td><td>A</td><td>15-FEB-2005</td></tr> <tr><td>CAMPUS_CARD</td><td>CC Integration Roles</td><td>G</td><td>01-FEB-2005</td></tr> <tr><td>CMS</td><td>test</td><td>G</td><td>18-OCT-2004</td></tr> <tr><td>COBRA_APPL</td><td>Cobra Application</td><td>H</td><td>12-JAN-2005</td></tr> <tr><td>COURTS</td><td>Banner Courts</td><td>C</td><td>10-MAY-1991</td></tr> <tr><td>DEF11659</td><td>UI0 employees for payroll</td><td>H</td><td>07-OCT-2004</td></tr> <tr><td>FINAID</td><td>Financial Aid Application</td><td>R</td><td>18-APR-1991</td></tr> <tr><td>GENERAL</td><td>General Module</td><td>G</td><td>30-MAY-1994</td></tr> <tr><td>GEORGE</td><td>Shalovka Test App - Don't Touc</td><td>G</td><td>17-FEB-2004</td></tr> <tr><td>HOUSING</td><td>BANNER Student Housing Module</td><td>S</td><td>11-JAN-1994</td></tr> <tr><td>HRAPPL</td><td>HR Applicant</td><td>H</td><td>13-JUN-1991</td></tr> <tr><td>HREMPLE</td><td>HR Employee</td><td>H</td><td>13-JUN-1991</td></tr> <tr><td>LISA</td><td>Lisa's popsel</td><td>T</td><td>05-FEB-2004</td></tr> <tr><td>LM_BATCHES</td><td>LM_BATCHES</td><td>S</td><td>17-MAR-2004</td></tr> <tr><td>PIN_RESET</td><td>PIN Reset Notification</td><td>G</td><td>12-JUL-2001</td></tr> <tr><td>RECRUITING</td><td>BANNER Student Recruiting Mod.</td><td>S</td><td>09-SEP-1991</td></tr> </tbody> </table>	Application	Description	System	Activity Date	A2345678901234567890123456789	A23456789012345678901234567890	R	27-MAY-2004	A23456789012345678901234567890	Test Application	R	27-MAY-2004	ADMISSIONS	BANNER Student Admissions Mod.	S	12-JUN-1991	ALUMNI	BANNER Alumni/Development	A	10-MAY-1991	AR	Accounts Receivable	T	22-OCT-2003	BANSTU_SAMPLE	Student Sample Data Examples	S	06-APR-1995	BM_APPLICATION	test letter	A	15-FEB-2005	CAMPUS_CARD	CC Integration Roles	G	01-FEB-2005	CMS	test	G	18-OCT-2004	COBRA_APPL	Cobra Application	H	12-JAN-2005	COURTS	Banner Courts	C	10-MAY-1991	DEF11659	UI0 employees for payroll	H	07-OCT-2004	FINAID	Financial Aid Application	R	18-APR-1991	GENERAL	General Module	G	30-MAY-1994	GEORGE	Shalovka Test App - Don't Touc	G	17-FEB-2004	HOUSING	BANNER Student Housing Module	S	11-JAN-1994	HRAPPL	HR Applicant	H	13-JUN-1991	HREMPLE	HR Employee	H	13-JUN-1991	LISA	Lisa's popsel	T	05-FEB-2004	LM_BATCHES	LM_BATCHES	S	17-MAR-2004	PIN_RESET	PIN Reset Notification	G	12-JUL-2001	RECRUITING	BANNER Student Recruiting Mod.	S	09-SEP-1991
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Section B: Set Up

Lesson: Define an Application with Application-Level Rules

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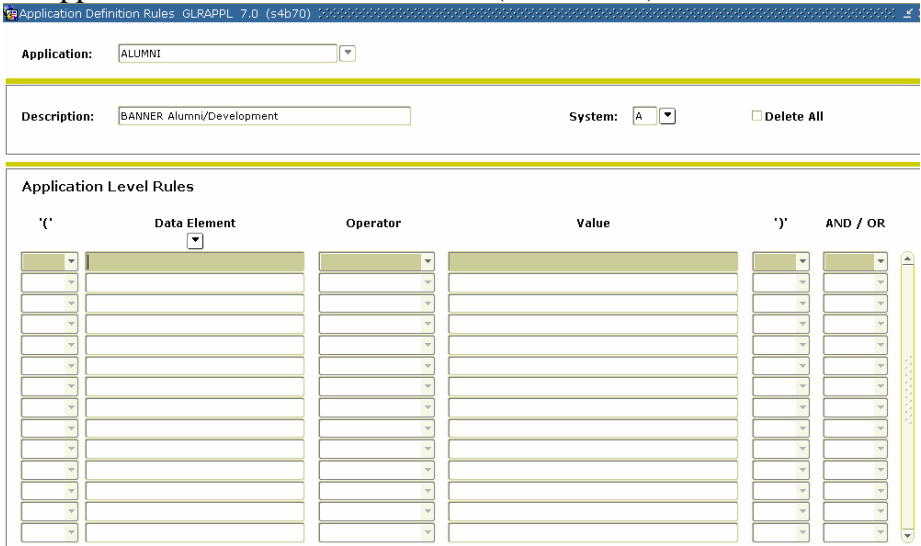
Introduction

As mentioned in the previous section, the Application Definition Rules Form (GLRAPPL) is used to define and maintain the rules that will be applied to every population selection you create with this application.

An application includes general, high-level rules used to select PIDs. Any rules in an application are automatically included in all population selections controlled by the application. Population selections within an application can have additional, more detailed rules that select specific populations. For example, an application can select alumni only. Within the application, various population selections might select alumni who are married and live in a certain state.

Procedure

The Alumni Director wants to begin using Population Selection and since she works only with alumni, she wants to restrict all of her population selections to people with a donor category indicating alumni status. She can do this by defining an Application.

Step	Action
1	<p>Access the Application Definition Rules Form (GLRAPPL).</p>  <p>The screenshot shows the 'Application Definition Rules' form. At the top, the browser title is 'Application Definition Rules - GLRAPPL 7.0 (s4b70)'. The 'Application:' dropdown is set to 'ALUMNI'. The 'Description:' field contains 'BANNER Alumni/Development'. The 'System:' dropdown is set to 'A', and there is a 'Delete All' checkbox. Below this is the 'Application Level Rules' section, which is a table with the following columns: '(', 'Data Element', 'Operator', 'Value', ')', and 'AND / OR'. The table has 10 rows, each with dropdown menus for the first five columns and a vertical scroll bar on the right.</p>
2	Click the Search icon for the Application field to view the List of Values.
3	Review the list of applications already defined. Confirm that there isn't one.
4	Click Cancel to return to GLRAPPL.



Section B: Set Up

Lesson: Define an Application with Application-Level Rules (Continued)

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Procedure, continued

Step	Action
5	In the Application field, enter an application code using your last and first initial and the characters AD (indicating Alumni Director). Example: Mary Smith would enter <i>MS_AD</i> . <u>Note:</u> Each participant must create a unique code.
6	Perform a Next Block function.
7	In the Description field, enter a description for your application. <i>Example:</i> MS's Alumni Director Application
8	Double-click in the System field to display a List of Values for system indicators.
9	Select an appropriate value. <i>Example:</i> A—Alumni Development <u>Note:</u> The System field identifies the Banner System associated with the application.
10	Perform a Next Block function.
11	Click in the Rules block and enter the following information: Data Element APRCATG_DONR_CODE Operator IN (select from the pull-down list) Value ('ALUM', 'ALND') Values must be enclosed in single quotes and must be entered exactly as they are stored in the data tables. In addition, multiple values must be enclosed in parentheses.
12	Click the Save icon.
13	Click the Rollback icon.
14	Check to confirm that the rules were entered.



Section B: Set Up

Lesson: Define Simple Population Selection Rules

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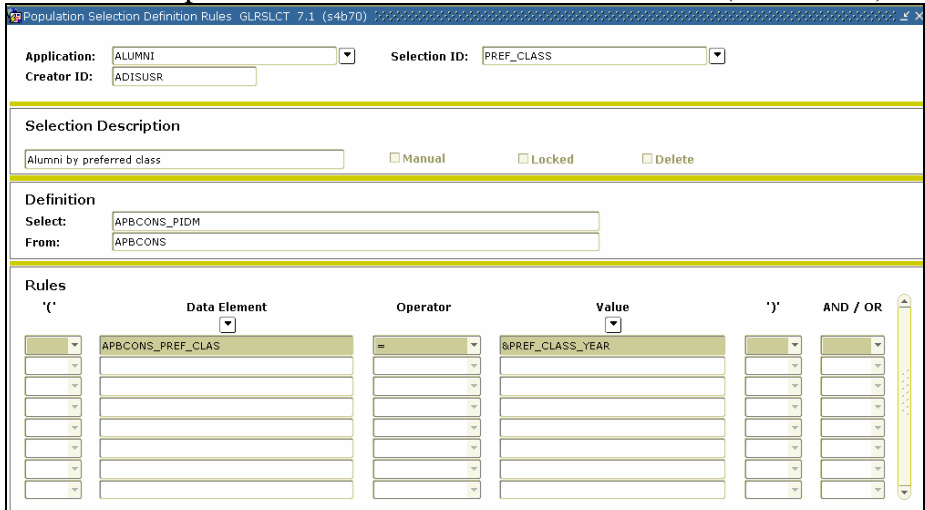
Introduction

The Population Selection Definition Rules Form (GLRSLCT) is used to define, maintain, and copy an existing population selection.

A population selection is a set of rules used to select PIDMS from the Banner database for reports, processes, and letters. For example, you can use a population selection to select a group of alumni to invite to a workshop. An application, selection ID, and creator ID uniquely identify a population selection.

How to complete

The Alumni Director is planning a workshop on finances for retired alumni. She wants to use Population Selection to find alumni who are near the age of retirement so she can send invitations. In defining the rules for her population, the Alumni Director needs to specify that a person has graduated in a certain year, in addition to the application rules which restrict the population to alumni.

Step	Action
1	<p>Access the Population Selection Definition Rules Form (GLRSLCT).</p>  <p>The screenshot shows the 'Population Selection Definition Rules - GLRSLCT 7.1 (s4b70)' form. It includes fields for 'Application' (ALUMNI), 'Selection ID' (PREF_CLASS), and 'Creator ID' (ADISUSR). Below these are sections for 'Selection Description' (Alumni by preferred class), 'Definition' (Select: APBCONS_PIDM, From: APBCONS), and a 'Rules' table. The Rules table has columns for Data Element, Operator, Value, and AND/OR, with a single rule defined: APBCONS_PREF_CLAS = &PREF_CLASS_YEAR.</p>
2	<p>In the Application field in the Key block, enter the code for the Alumni Director Application previously defined.</p>



Section B: Set Up

Lesson: Define Simple Population Selection Rules (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
3	In the Selection ID field, enter the code <i>Pref__Class</i> . <u>Note:</u> Give your populations meaningful names. They should be long enough to be descriptive, but not so long that they are awkward to type again and again. Indicate spaces with an underscore. The user ID used to log into the Banner System is displayed in the Creator ID field.
4	Perform a Next Block function.
5	In the Description field, enter a description for your Selection ID (something that specifically describes your Selection ID). <u>Example:</u> Preferred Class
6	Perform a Next Block function.
7	In the Select field, enter <i>APBCONS_PIDM</i> . <u>Note:</u> The message line indicates what is expected
8	In the From field, enter <i>APBCONS</i> .
9	Perform a Next Block function.
10	In the Data Element field, enter <i>APBCONS_PREF_CLAS</i> .
11	In the Operator field, select '='.
12	In the Value field, enter '1960'.
13	Click the Save icon.
14	Click the Exit icon.
15	You will see the message "Performing Population Selection Compilation, please wait."
16	If your Population Selection is compiled successfully, you will exit the form. If it does not compile successfully, you will be returned to GLRSLCT and an error message will display. You must examine your rules and correct any errors.
17	Access the Population Selection Inquiry Form (GLISLCT).
18	Navigate to the Selection ID field.
19	Note that the new Selection ID now displays.
20	Click the Exit icon.



Section B: Set Up

Lesson: Copy Population Selection Rules

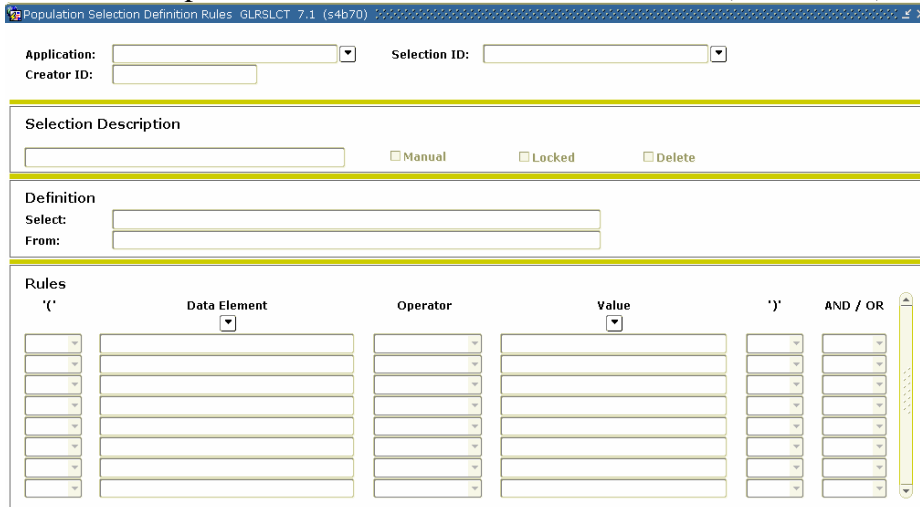
◀ Jump to TOC

Introduction

The Population Selection Definition Rules Form (GLRSLCT) will also allow the copying of rules in an existing population selection and creating a new population selection. By changing the application and selection ID, your ID becomes the creator ID. A copied population selection can be changed as needed.

How to complete

The Alumni Director is planning another workshop. This time she wants to invite only single alumni. She plans to use Population Selection to prepare her invitations, and she knows that she already has rules defined to select married alumni. She decides to copy her old rules rather than defining new ones from scratch.

Step	Action
1	<p>Access the Population Selection Definition Rules Form (GLRSLCT).</p>  <p>The screenshot shows the GLRSLCT form with the following sections: <ul style="list-style-type: none"> Application: A dropdown menu. Selection ID: A dropdown menu. Creator ID: A text input field. Selection Description: A text input field with checkboxes for Manual, Locked, and Delete. Definition: Fields for Select and From. Rules: A table with columns for Data Element, Operator, Value, and AND/OR, with a vertical scroll bar on the right. </p>
2	In the Application field in the Key block, enter the code for the Alumni Director Application previously created.
3	In the Selection ID field, enter the code PREF_CLAS for the Population Selection to be copied. Or click on search icon and view the list of choices.
	<u>Note:</u> The user ID used to log into the SCT Banner System is displayed in the Creator ID field.
4	Perform a Next Block function. The rules for the population will display.
5	Select <u>C</u> opy from the Options menu. A dialog box will display.



Section B: Set Up

Lesson: Copy Population Selection Rules (Continued)

◀ Jump to TOC

How to complete, continued

Step	Action						
6	Information in the Copy From block should be populated.						
7	<p>In the Copy To block, in the Application field, enter the same application code.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Copy From</p> <p>Application: <input type="text" value="ALUMNI"/></p> <p>Selection: <input type="text" value="PREF_CLASS"/></p> <p>Creator ID: <input type="text" value="ADISUSR"/></p> <hr/> <p>Copy To</p> <p>Application: <input type="text"/></p> <p>Selection: <input type="text"/></p> <p>Creator ID: <input type="text" value="DRICHIE"/></p> </div> <p>** Press INSERT RECORD to copy Application/Population Selection Rules **</p>						
8	<p>In the Selection ID field, enter <i>Single</i>.</p> <p><u>Note:</u> The Creator ID field self-populates.</p>						
9	Select the Insert Record function to copy the information.						
10	After your rules have been copied, you will return to the Population Selection Definition Form. The Selection ID will be SINGLE.						
11	<p>In the Description field, enter a new description for your copied Selection ID.</p> <p><u>Example:</u> Workshop for Singles.</p>						
12	Perform a Next Block function twice to navigate to the Rules block.						
13	<p>Change the value of the Data Element to SPBPERS_MRTL_CODE and the value element so it is equal to 'S' instead of '1960'.</p> <table style="margin-left: 40px;"> <tr> <td>Data Element</td> <td>SPBPERS_MRTL_CODE</td> </tr> <tr> <td>Operator</td> <td>=</td> </tr> <tr> <td>Value</td> <td>'S'</td> </tr> </table>	Data Element	SPBPERS_MRTL_CODE	Operator	=	Value	'S'
Data Element	SPBPERS_MRTL_CODE						
Operator	=						
Value	'S'						
14	Click the Save icon.						
15	Click the Exit icon.						
16	You will see the message "Performing Population Selection Compilation, please wait."						



Section B: Set Up

Lesson: Copy Population Selection Rules (Continued)

◀ Jump to TOC

How to complete, continued

Step	Action
17	If your Population Selection is compiled successfully, you will exit the form. If it does not compile successfully, you will be returned to GLRSLCT and an error message will display. You must correct your error and try compiling it again.
18	Access the Population Selection Inquiry Form (GLISLCT).
19	Note that the new Selection ID now displays.
20	Click the Exit icon.



Section B: Set Up

Lesson: Self Check

◀ Jump to TOC

Directions

Match the form from the list on the left with the description on the right. Try to do this without using your workbook notes.

Question 1

You are ready to begin defining and testing Population Selection rules. You want to define an application for your personal testing use. You must first determine whether an application exists with the code you wish to assign to your application then you can create your application. What form should you access to complete this process?

Question 2

What form do you access to make sure that an application that you created was saved?

Question 3

The Alumni Director wants to begin using Population Selection and since she works only with alumni, she wants to restrict all of her population selections to people with a donor category indicating alumni status. She can do this by defining an application. What form should she access to complete this process?

Question 4

The Alumni Director is planning a workshop on finances for married alumni. She wants to use Population Selection to find alumni who are married so she can send invitations. In defining the rules for her population, the Alumni Director needs to specify that a person is married, in addition to the application rules which restrict the population to alumni.



Section B: Set Up

Lesson: Answer Key

◀ Jump to TOC

Question 1

You are ready to begin defining and testing Population Selection rules. You want to define an application for your personal testing use. You must first determine whether an application exists with the code you wish to assign to your application then you can create your application. What form should you access to complete this process?

Application Definition Rules Form (GLRAPPL)

Question 2

What form do you access to make sure that an application that you created was saved?

Application Inquiry Form (GLIAPPL)

Question 3

The Alumni Director wants to begin using Population Selection and since she works only with alumni, she wants to restrict all of her population selections to people with a donor category indicating alumni status. She can do this by defining an application. What form should she access to complete this process?

Application Definition Rules Form (GLRAPPL)

Question 4

The Alumni Director is planning a workshop on finances for married alumni. She wants to use Population Selection to find alumni who are married so she can send invitations. In defining the rules for her population, the Alumni Director needs to specify that a person is married, in addition to the application rules which restrict the population to alumni.

Population Selection Definition Rules Form (GLRSLCT)



Section C: Day-to-Day Operations

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to explain the day-to-day operational procedures to handle population selections at your institution.

Intended audience

Alumni Office staff.

This course is intended for technical staff members and users who will

- define selection IDs and extract populations
- define applications, variables, and objects.

Objectives

At the end of this course, participants will be able to

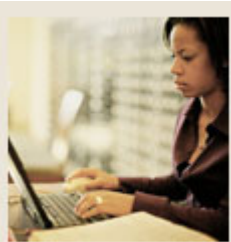
- select a population
- view population selection results
- perform a query on a selected population
- add people to a selected population
- delete the results of a population.

Prerequisites

To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the Banner system.

A significant portion of this training covers material that is “technical” in nature and requires understanding of Banner data structures, Banner data element naming conventions, and the use of query tools.

Population Selection discusses data at the database level and presents information in the structure of standard query languages. Attendees should be familiar with database concepts and naming conventions, and also be familiar with standard query tools.



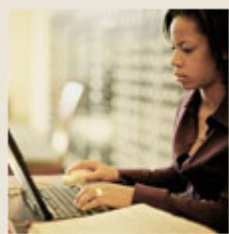
Section C: Day-to-Day Operations

Lesson: Overview (Continued)

◀ [Jump to TOC](#)

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Using Dynamic Selections	45
Pulling Records from a Specific Population Selection	47
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Section C: Day-to-Day Operations

Lesson: Process Introduction

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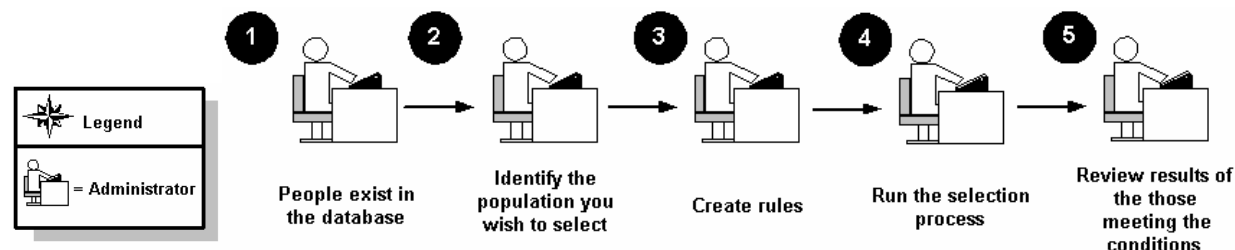
Introduction

The Advancement Office can

- manually create, change, and display a population of IDs for reports, processes, and letters
- define the rules used to select IDs from the Banner database for reports, processes, and letters
- define the functional areas (applications) used in the Population Selection and Letter Generation modules
- define the variables used in the Population Selection and Letter Generation modules to select a specific piece of data in the database
- define common rules, or objects, that are used in many different population selections and variables.

Flow Diagram

This is a high-level flow diagram that represents a day-to-day perspective of the Population Selection process.



What Happens

The stages of this process are described in this table.

Stage	Description
1	Constituents exist in the database
2	Identify the population you wish to select
3	Create rules
4	Run the selection Process
5	Review the results of those meeting the conditions



Section C: Day-to-Day Operations

Lesson: Running a Population Selection

◀ Jump to TOC

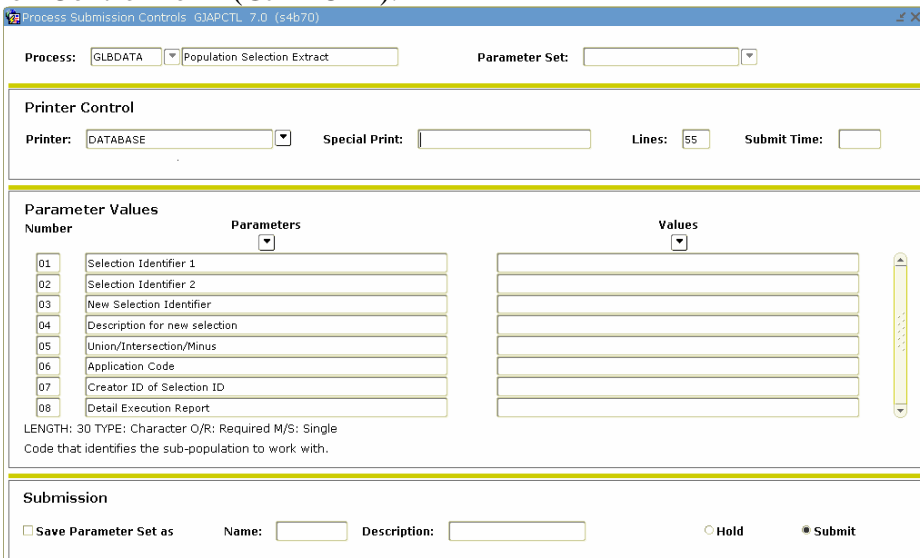
Introduction

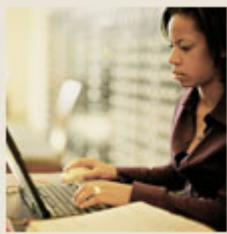
The Population Selection Extract Process, GLBDATA, extracts PIDMs (people and non-persons) from the Banner database based on the rules entered on the Population Selection Definition Rules Form (GLRSLCT). If the results of this extract will be used to identify the population receiving a letter, it should be executed before running the Variable Data Extract Process (GLBLSEL). If the results of this extract will be used to identify the population to be used in a report, it must be executed before running that report.

The Population Selection Extract Process is run from the Process Submission Control Form (GJAPCTL). In the **Printer** field, you may enter 'NOPRINT' or 'DATABASE' instead of your printer code.

Procedure

The Alumni Director is ready to mail invitations for her workshop for married alumni. She plans to use Population Selection to prepare her invitations. She knows she already has rules defined to select married alumni. Now she wants to select the records that meet her criteria.

Step	Action
1	<p>Access the Population Selection Extract Process (GLBDATA) via the Process Submission Control Form (GJAPCTL).</p> 
2	Choose your printer option (DATABASE, NOPRINT, or a printer).



Section C: Day-to-Day Operations

Lesson: Running a Population Selection (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
3	Click in the Values field of the Parameter Values Block.
4	Enter the following parameters: <ul style="list-style-type: none">• Parameter 01 – Selection Identifier 1 – Enter the name of the population selection defined above• Parameter 06 – Application Code – Enter the code for your Alumni Director's application (All upper case)• Parameter 07 – Creator ID of Selection ID – Enter the creator of the selection entered in parameter 01 (your user id).• Parameter 08 Enter S to show SQL statements, I to show SQL and inserts and Y to show paragraphs. If DATABASE was chosen as your printer option then these are viewable after the process completes.
5	Perform a Next Block function to access the Submission Block.
6	Click the Save icon. The form will clear, and the cursor will return to the Key Block. A sequence number will display in the Autohelp line.



Section C: Day-to-Day Operations

Lesson: View Population Selection Results

◀ Jump to TOC

Introduction

The Population Selection Extract Inquiry Form (GLIEXTR) is used to display a population.

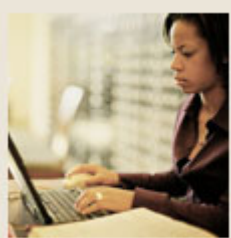
A population is uniquely identified by an application, selection ID, creator ID, and user ID. The Application is the functional area that controls the population. The Selection ID identifies the population selection, or set of rules, that selected the PIDMs. These fields will automatically populate when you enter the form.

Or you can click the **Search** icon to display population selection IDs on the Population Selection Inquiry Form (GLISLCT). The Creator ID is the Oracle ID of the user who created the population selection. The User ID is the Oracle ID of the user who selected the population. This ID defaults to the ID of the person logged on to SCT Banner, but you can enter another ID. The User ID must be an ID that previously ran the extract to obtain a population. If a population selection is locked on GLRSLCT, only the creator ID can display any populations created with the population selection.

Procedure

The Alumni Director has extracted the population of married alumni and wants to view the results.

Step	Action
1	<p>From menu, select GLIEXTR Population Selection Extract Inquiry.</p>



Section C: Day-to-Day Operations

Lesson: View Population Selection Results (Continued)

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Procedure, continued

Step	Action
2	<p>GLIEXTR will display, with the following four identifiers in the Key Block:</p> <ul style="list-style-type: none">• Application• Selection ID• Creator ID• User ID <p><u>Notes:</u></p> <ul style="list-style-type: none">• These identifiers should display the selection you just processed. If not, (or if you want to see the results of another process), click on the Search icon to select the correct one.• The SORT BY ID and SORT BY NAME choices allow you to view the records in either order.
3	<p>Perform a Next Block function to view the names extracted.</p>
4	<p>You may receive a warning that some of the names are deceased or confidential. The indicators next to the names will provide this information as well.</p> <p><u>Note:</u> Extra criteria could be added to the population selection rules on GLRSLCT to exclude deceased and/or confidential records.</p>



Section C: Day-to-Day Operations

Lesson: Viewing and Editing the Results of a Population Selection

◀ Jump to TOC

Introduction

The Population Selection Extract Data Form (GLAEXTR) is used to display a population *that you created*. In addition, you can add or delete records to or from a population *that you created*. You cannot edit someone else's results; use GLIEXTR to view them.

Procedure

Follow these steps to complete the procedure

Step	Action
1	<p>Access the Population Selection Extract Form (GLAEXTR).</p>
2	<p>GLAEXTR will display, with the following four identifiers in the Key Block :</p> <ul style="list-style-type: none"> • Application • Selection ID • Creator ID • User ID
3	<p>These identifiers should display the selection you just processed. If not, (or if you want to see the results of another process), Click the Search icon to select the correct one.</p> <p><u>Note:</u> You can only edit selections for which you are the user (you can never alter another user's selection results!)</p>
4	<p>Perform a Next Block function to view the names extracted.</p>



Section C: Day-to-Day Operations

Lesson: Viewing and Editing the Results of a Population Selection (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
5	You may receive a warning that some of the names are deceased or confidential. The indicators next to the names will provide this information as well.
6	You can now manually add or delete names from your extract results. Any manual additions will be indicated by the MANUAL button. <ul style="list-style-type: none">• Add a name to your population.• Search for the name of a deceased person and delete it.
7	Click the Save icon. <u>Note:</u> If you delete a name, any subsequent running of the extract process will re-extract that name. If you manually add a name, that name will remain in all subsequent extracts until you manually delete it!

Viewing additional results

The Advancement Individual Query Form (APIBRWS) provides additional information about the constituents selected including Primary Constituent Category, Preferred Class and spouse information. You can view Profile information from this form.

This is a useful form to use to verify that the correct people were extracted in a selection. You can use querying to select particular records (e.g. a particular class year.) You cannot add or delete records in this form, but records that you added or deleted in GLAEXTR will be displayed.



Section C: Day-to-Day Operations

Lesson: Viewing and Editing the Results of a Population Selection (Continued)

◀ Jump to TOC

Procedure

Follow the steps to complete the process.

Step	Action
1	<p>Access the Advancement Individual Browsing Form (APIBRWS).</p> <p>The screenshot shows the 'Advancement: Individual Browsing APIBRWS 7.0 (s4b70)' interface. It includes search fields for Application, Selection ID, Creator ID, and User ID (pre-filled with 'DRICHIE'). There are also fields for Count of IDs, Last Run Date, and a Sort dropdown set to 'Name'. Below the search fields is a table titled 'Constituents in Population' with columns for Name, Class, Category, Confidential, and Deceased. The table contains multiple rows, each with input fields for ID and Spouse, and checkboxes for Confidential and Deceased status.</p>
2	<p>APIBRWS will display, with the following four identifiers in the Key Block:</p> <ul style="list-style-type: none"> • Application • Selection ID • Creator ID • User ID <p><u>Note:</u> These identifiers should display the selection you just processed. If not, (or if you want to see the results of another process), click on the search button to select the correct one.</p>
3	<p>Perform a Next Block function to view the names extracted.</p>
4	<p>You may receive a warning that some of the names are deceased or confidential. The indicators next to the names will provide this information as well.</p>
5	<p>This form will also display donor category, preferred class, and spouse information. You can select an ID and use the <u>OPTIONS/PROFILE</u> option to view complete profile information.</p>



Section C: Day-to-Day Operations

Lesson: Running a Union Population Selection

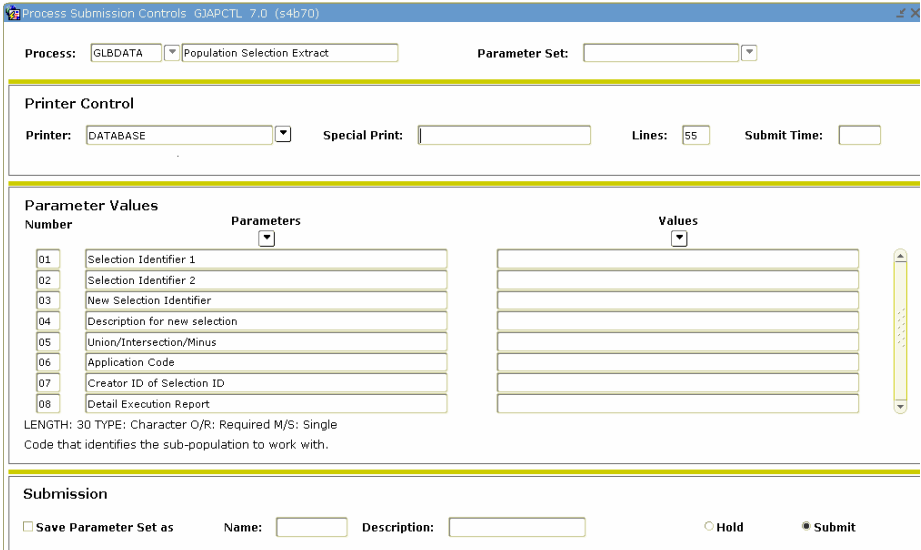
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Introduction

A Union Population selection combines the results of two population selections into a new population selection. The process described below is the process of extracting PIDMs for two pre-existing population selections.

Procedure

Follow the steps to complete the procedure.

Step	Action
1	Access the Population Selection Extract Process (GLBDATA) via the Process Submission Control Form (GJAPCTL).
2	<p style="text-align: center;">ENTER DATABASE IN THE PRINTER FIELD.</p> 
3	Perform a Next Block function to access the Parameter Values Block.



Section C: Day-to-Day Operations

Lesson: Running a Union Population Selection (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
4	<p>Enter the following parameters:</p> <ul style="list-style-type: none">• Parameter 01 – Selection Identifier 1 – Enter the name of the population selection• Parameter 02 – Selection Identifier 2 – Enter the name of the second population selection• Parameter 03 – New Selection Identifier – Enter a new name for the combined results (this will be the name of the new population selection)• Parameter 04 – Description for New Selection – Enter a simple description of the result selection.• Parameter 05 – Union/Intersection/Minus – Enter ‘U’• Parameter 06 – Application Code – Enter the code for the application that owns the populations you are combining (in uppercase.)• Parameter 07 – Creator ID of Selection ID – Enter the creator of the selection entered in parameter 01 (this can be seen by clicking on the search button in Parameter 01)• Parameter 08 –Enter S for SQL, I for SQL and inserts and Y for paragraphs <p><u>Note:</u> Both Selections MUST have the same creator ID</p>
5	Perform a Next Block function to access the Submission Block
6	Click the Save icon.
7	The form will clear, and the cursor will return to the Key Block. A sequence number will display in the Autohelp line. You can view the results on GLIEXTR, GLAEXTR or APIBRWS.



Section C: Day-to-Day Operations

Lesson: Running an Intersection Population Selection

◀ Jump to TOC

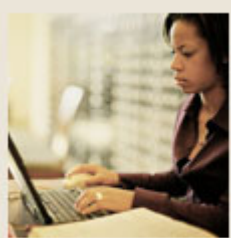
Introduction

An intersection population selection combines the shared PIDMs of two population selections and creates a new population selection. The process described below is the process of extracting PIDMs for two pre-existing population selections.

Procedure

Follow these steps to complete the procedure.

Step	Action																											
1	Access the Population Selection Extract Process (GLBDATA) via the Process Submission Control Form (GJAPCTL).																											
2	Enter <i>Database</i> in the Printer field. <div data-bbox="402 898 1317 1444" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Process Submission Controls: GJAPCTL 7.0 (s4b70)</p> <p>Process: GLBDATA Population Selection Extract Parameter Set:</p> <p>Printer Control</p> <p>Printer: DATABASE Special Print: Lines: 55 Submit Time:</p> <p>Parameter Values</p> <table border="1"> <thead> <tr> <th>Number</th> <th>Parameters</th> <th>Values</th> </tr> </thead> <tbody> <tr><td>01</td><td>Selection Identifier 1</td><td></td></tr> <tr><td>02</td><td>Selection Identifier 2</td><td></td></tr> <tr><td>03</td><td>New Selection Identifier</td><td></td></tr> <tr><td>04</td><td>Description for new selection</td><td></td></tr> <tr><td>05</td><td>Union/Intersection/Minus</td><td></td></tr> <tr><td>06</td><td>Application Code</td><td></td></tr> <tr><td>07</td><td>Creator ID of Selection ID</td><td></td></tr> <tr><td>08</td><td>Detail Execution Report</td><td></td></tr> </tbody> </table> <p>LENGTH: 30 TYPE: Character O/R: Required M/S: Single Code that identifies the sub-population to work with.</p> <p>Submission</p> <p><input type="checkbox"/> Save Parameter Set as Name: Description: <input type="radio"/> Hold <input checked="" type="radio"/> Submit</p> </div>	Number	Parameters	Values	01	Selection Identifier 1		02	Selection Identifier 2		03	New Selection Identifier		04	Description for new selection		05	Union/Intersection/Minus		06	Application Code		07	Creator ID of Selection ID		08	Detail Execution Report	
Number	Parameters	Values																										
01	Selection Identifier 1																											
02	Selection Identifier 2																											
03	New Selection Identifier																											
04	Description for new selection																											
05	Union/Intersection/Minus																											
06	Application Code																											
07	Creator ID of Selection ID																											
08	Detail Execution Report																											
3	Click in the Values field of the Parameter Values Block.																											



Section C: Day-to-Day Operations

Lesson: Running an Intersection Population Selection (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
4	<p>Enter the following parameters:</p> <ul style="list-style-type: none">• Parameter 01 – Selection Identifier 1 – Enter the name of the population selection• Parameter 02 – Selection Identifier 2 – Enter the name of the second population selection• Parameter 03 – New Selection Identifier – Enter a new name for the combined results (this will be the name of the new population selection)• Parameter 04 – Description for New Selection – Enter a simple description of the result selection.• Parameter 05 – Union/Intersection/Minus – Enter ‘I’• Parameter 06 – Application Code – Enter the code for the application that owns the populations you are using (in uppercase.)• Parameter 07 – Creator ID of Selection ID – Enter the creator of the selection entered in parameter 01 (this can be seen by clicking on the search button in Parameter 01)• Parameter 08 – Enter S for SQL, I for SQL and inserts and Y for paragraphs <p><u>Note:</u> Both Selections MUST have the same creator ID</p>
5	Perform a Next Block function to access the Submission Block.
6	Click the Save icon.
7	The form will clear, and the cursor will return to the Key Block. A sequence number will display in the Autohelp line. You can view the results on GLIEXTR, GLAEXTR and APIBRWS.



Section C: Day-to-Day Operations

Lesson: Running a Minus Population Selection

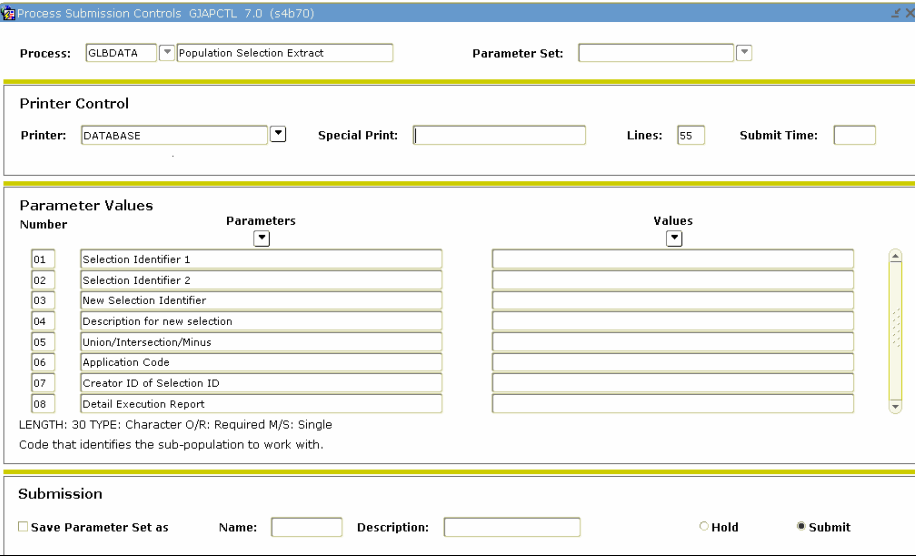
◀ Jump to TOC

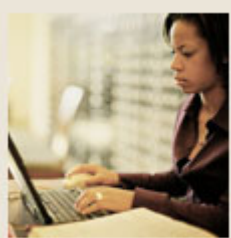
Introduction

A minus population selection subtracts the names of the **SECOND** population from the first population selection. It is useful to remove records from a population. You must be careful to enter the Selection IDs in the correct sequence! The process described below is the process of extracting IDs for two pre-existing population selections.

Procedure

Follow the steps to complete the procedure.

Step	Action
1	Access the Population Selection Extract Process (GLBDATA) via the Process Submission Control Form (GJAPCTL).
2	Enter <i>Database</i> in the Printer field. 
3	Click in the Values field of the Parameter Values Block.



Section C: Day-to-Day Operations

Lesson: Running a Minus Population Selection (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
4	Enter the following parameters: <ul style="list-style-type: none"> • Parameter 01 – Selection Identifier 1 – Enter the name of the population selection that you want to remove records from. • Parameter 02 – Selection Identifier 2 – Enter the name of the second population selection. This group will be SUBTRACTED from the first group. • Parameter 03 – New Selection Identifier – Enter a new name for the combined results (this will be the name of the new population selection) • Parameter 04 – Description for New Selection – Enter a simple description of the result selection. • Parameter 05 – Union/Intersection/Minus – Enter ‘M’ • Parameter 06 – Application Code – Enter the code for the application that owns the populations you are using (in uppercase.) • Parameter 07 – Creator ID of Selection ID – Enter the creator of the selection entered in parameter 01 (this can be seen by clicking on the search button in Parameter 01) • Parameter 08 – Enter S for SQL, I for SQL and inserts and Y for paragraph <p><u>Note:</u> Both Selections MUST have the same creator ID.</p>
5	Perform a Next Block function to access the Submission Block.
6	Click the Save icon.
7	The form will clear, and the cursor will return to the Key Block. A sequence number will display in the Autohelp line. You can view the results on GLIEXTR, GLAEXTR or APIBRWS. If the results are not what you expected, you will have to run the two populations again to return them to their original states, and then minus them.



Section C: Day-to-Day Operations

Lesson: Deleting a Population Selection

◀ Jump to TOC

Introduction

You can delete the results (extract) of a pop sel, or the rules or both.

Procedure

Follow these steps to complete the process.

Step	Action
1	<p>Access the Population Selection Extract Form (GLAEXTR).</p> <p>The screenshot shows the 'Population Selection Extract Data' form. It includes dropdown menus for 'Application' (set to 'BANNER Alumni/Development') and 'Selection ID' (set to 'Alumni by preferred class'). There are input fields for 'Creator ID' and 'User ID' (containing 'DRICHIE'). A 'Delete All' checkbox is present. Below is a table with columns: ID, Deceased, Confidential, System, Manual, and Activity Date. The table contains 15 rows of data.</p>
2	Click the Delete All checkbox.
3	Click the Save icon.
IF	THEN
you have run and extract	you must also delete the results/extract. Continue with the remaining steps.

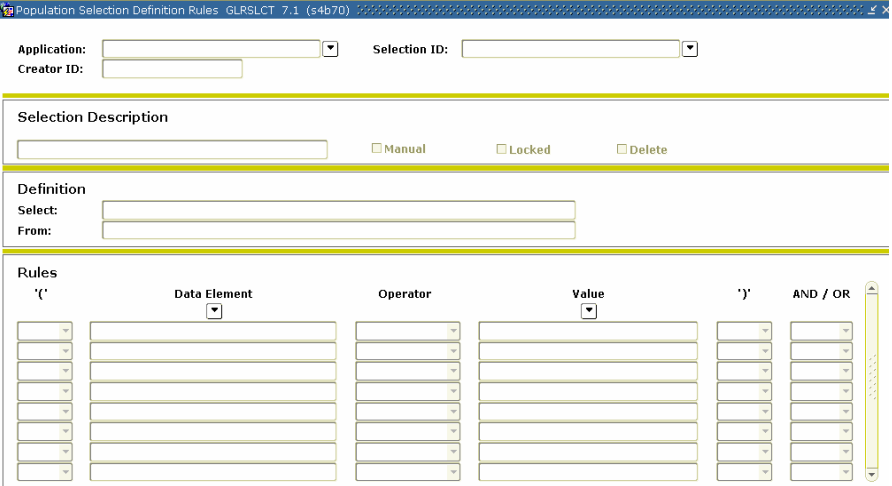


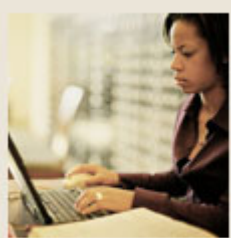
Section C: Day-to-Day Operations

Lesson: Deleting a Population Selection (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
4	<p>Access the Population Selection Definition Rules Form (GLRSLCT)</p> 
5	Click the Delete checkbox in the Selection Description block.
6	Click the Save icon.
7	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Using Dynamic Selections

◀ Jump to TOC

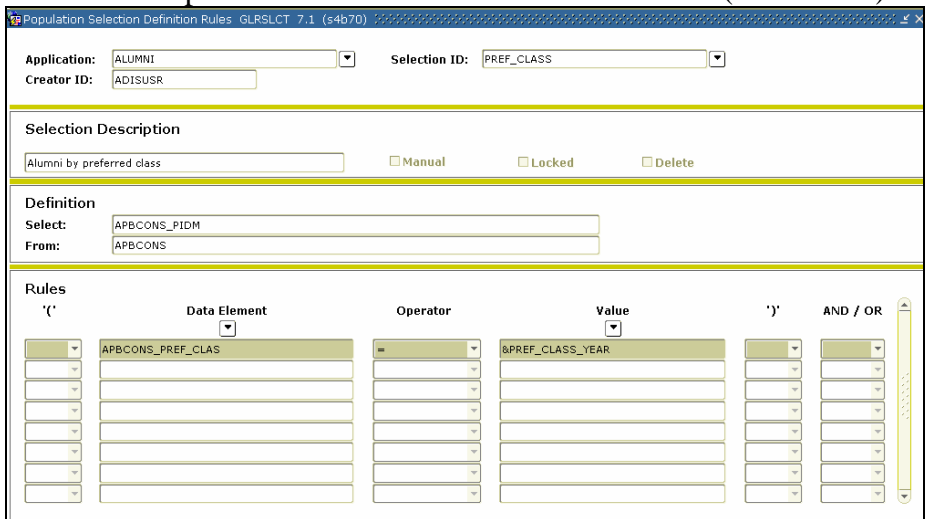
Introduction

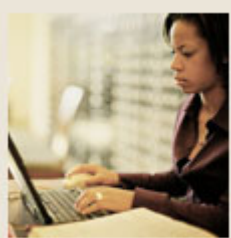
Allows you to create a master pop sel that when you run it, asks for you to enter one of the parameters that changes.

Example: You want to host an event for your alumni in various states so you want the STATE field a parameter that you can enter each time but the rest of the criteria remains constant.

Procedure

Follow these steps to complete the process.

Step	Action
1	<p>Access the Population Selection Definition Rules Form (GLRSLCT).</p> 
2	In the Application field in the Key block, enter the code for the Alumni Director Application previously defined.
3	In the Selection ID field, enter the code <i>Pref__Class_Prompt</i> . <u>Note</u> : Give your populations meaningful names. They should be long enough to be descriptive, but not so long that they are awkward to type again and again. Indicate spaces with an underscore. The user ID used to log into the Banner System is displayed in the Creator ID field.
4	Perform a Next Block function.
5	In the Description field, enter a description for your Selection ID (something that specifically describes your Selection ID). <u>Example</u> : Preferred Class – Prompted for Year



Section C: Day-to-Day Operations

Lesson: Using Dynamic Selections (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action						
6	Perform a Next Block function.						
7	In the Select field, enter <i>APBCONS_PIDM</i> . <u>Note:</u> The message line indicates what is expected.						
8	In the From field, enter <i>APBCONS</i> .						
9	Perform a Next Block function.						
10	In the Data Element field, enter <i>APBCONS_PREF_CLAS</i> .						
11	In the Operator field, select '='.						
12	In the Value field, enter <i>&PREF_CLASS_YEAR</i> . <u>Note:</u> No quotes are used with the ampersand						
13	Click the Save icon.						
14	Click the Exit icon.						
15	You will see the message "Performing Population Selection Compilation, please wait."						
	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>your Population Selection is compiled successfully</td> <td>you will exit the form.</td> </tr> <tr> <td>your Population Selection does not compile successfully</td> <td>you will be returned to GLRSLCT. An error message will display. You must examine your rules and correct any errors.</td> </tr> </tbody> </table>	IF	THEN	your Population Selection is compiled successfully	you will exit the form.	your Population Selection does not compile successfully	you will be returned to GLRSLCT. An error message will display. You must examine your rules and correct any errors.
IF	THEN						
your Population Selection is compiled successfully	you will exit the form.						
your Population Selection does not compile successfully	you will be returned to GLRSLCT. An error message will display. You must examine your rules and correct any errors.						
16	Access the Population Selection Inquiry Form (GLISLCT).						
17	Navigate to the Selection ID field.						
18	Note that the new Selection ID now displays.						
19	Click the Exit icon.						
20	Run GLBDATA using the new Population Selection with the prompt. <u>Note:</u> The '&' in front of the field name creates a prompt for the user when they run GLBDATA on the Job Submission form. The first time you click the Save icon, parameter 88 will be displayed and you must supply a value. Enter the required value, access the Submission Block again, and Click the Save icon again. The form will clear, and the cursor will return to the Key Block. A sequence number will display in the Autohelp line.						



Section C: Day-to-Day Operations

Lesson: Pulling Records from a Specific Population Selection

◀ Jump to TOC

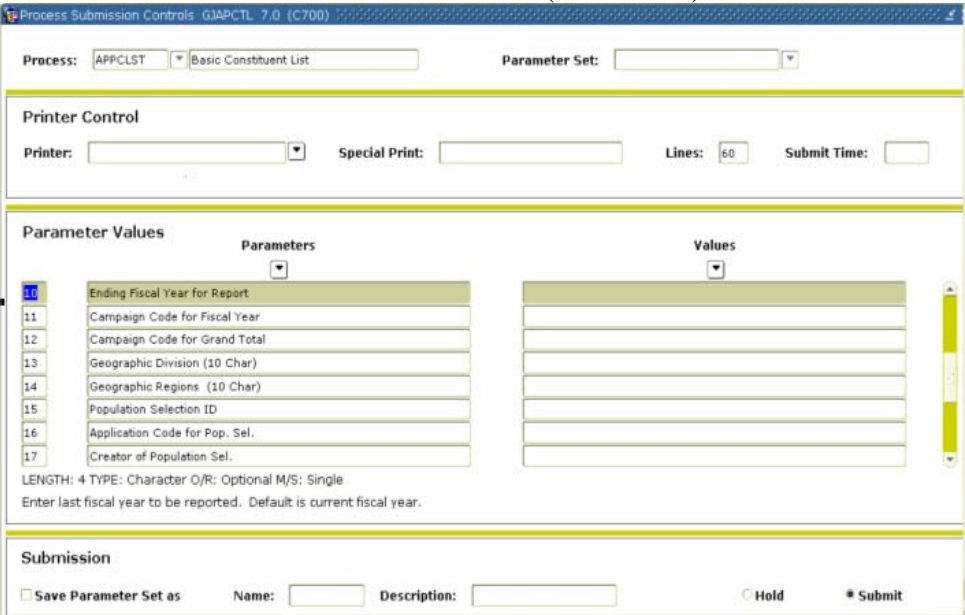
Introduction

The records found by the population selection process can be used in a variety of ways. Example: You can use the population identified in Letter Generation (see workbook for instructions), to create invitations or other correspondence, or Job Submission (see workbook for instructions) to run a SCT Banner report for this specific group of records. APPCLST is an example of an Advancement report that can use a Population Selection

The Basic Constituent List Process can be used to pull the records from a specific population selection, when the appropriate information is entered in parameters 15, 16, and 17.

Procedure

Follow these steps to complete the process.

Step	Action
1	<p>Access the Basic Constituent List Process (APPCLST).</p> 
2	Parameters 15, 16, and 17 can be used to pull the records from a specific population selection.



Section C: Day-to-Day Operations

Lesson: Self Check

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Directions

Use the information that you have learned in this workbook to complete this self check activity.

Question 1

What is the significance of the **System** field?

Question 2

How can you find out if you entered your application correctly?

Question 3

Can you think of a “population selection” that could be useful at your institution?

Question 4

How do you know if your population selection compiled successfully?

Question 5

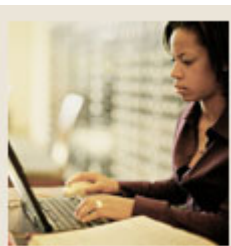
If you copy a population selection that was created by someone else, will his or her Creator ID always be attached to that selection?

Question 6

What is the purpose of the Creator ID?

Question 7

On what forms can you view the results of the population selection?



Section C: Day-to-Day Operations

Lesson: Answer Key

◀ Jump to TOC

Question 1

What is the significance of the **System** field?

The System field identifies the Banner System associated with the application.

Question 2

How can you find out if you entered your application correctly?

Through the Application Inquiry Form (GLIAPPL).

Question 3

Can you think of a “population selection” that could be useful at your institution?

Alumni who live in CT, donors of \$1,000 or more last year, donors who live in a zip code range, alumni in the Class of 1972.

Question 4

How do you know if your population selection compiled successfully?

If your Population Selection is compiled successfully, you will exit GLRSCLT form and be returned to the menu. If it does not compile successfully, you will be returned to GLRSLCT and an error message will display.

Question 5

If you copy a population selection that was created by someone else, will his or her Creator ID always be attached to that selection?

When a population selection is copied, the ID of the person copying becomes the Creator ID.



Section C: Day-to-Day Operations

Lesson: Answer Key (Continued)

◀ [Jump to TOC](#)

Question 6

What is the purpose of the Creator ID?

The Creator ID is the Oracle ID of the user who created the population selection. If a population selection is locked, only the Creator ID can display or execute any populations created with the population selection.

Question 7

On what forms can you view the results of your population selection?

On the GLIEXTR, GLAEXTR and APIBRWS forms.



Section D: Reference

Lesson: Overview

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Introduction

The purpose of this section is to provide reference materials related to the workbook.

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Forms Job Aid	54



Section D: Reference

Lesson: Setup Forms and Where Used

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Guide

Use this table as a guide to the setup forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Application Definition Rules Form	GLRAPPL		
Application Inquiry Form	GLIAPPL		
Population Selection Definition Rules Form	GLRSLCT	Population Selection Extract Process	GLBDATA
Population Selection Extract Process	GLBDATA	Population Selection Extract Inquiry Form	GLIEXTR
		Population Selection Extract Data (GLAEXTR)	
		Advancement Individual Browsing	APIBRWS



Section D: Reference

Lesson: Day-to-Day Forms and Setup Needed

◀ Jump to TOC

Guide

Use this table as a guide to the day-to-day forms and the setup forms needed for each.

Day-to-Day Form	Setup Forms Needed
Population Selection Extract Process (GLBDATA)	<ul style="list-style-type: none">• Population Selection Definition Rules Form (GLRSLCT)
Population Selection Extract Inquiry Form (GLIEXTR)	<ul style="list-style-type: none">• Population Selection Extract Process (GLBDATA)
Population Selection Extract Data (GLAEXTR)	<ul style="list-style-type: none">• Population Selection Extract Process (GLBDATA)
Advancement Individual Browsing (APIBRWS)	<ul style="list-style-type: none">• Population Selection Extract Process (GLBDATA)



Section D: Reference

Lesson: Forms Job Aid

◀ Jump to TOC

Guide

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
GLRAPPL	Application Definition Rules Form	
GLIAPPL	Application Inquiry Form	
GLRSLCT	Population Selection Definition Rules Form	
GLBDATA	Population Selection Extract Process	
GLIEXTR	Population Selection Extract Inquiry Form	
GLAEXTR	Population Selection Extract Data	
APIBRWS	Advancement Individual Browsing	



Release Date

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This workbook was last updated on 11/7/2005.