**BANNER FINANCIAL AID DAILY DOWNLOAD PROCESS 1415 02/13/2015**

**For 1415, start with Importing Files while 1314 files are still being processed.**

**EXPORTING FILES**

Banner - Make sure you are logged in under your **own** Banner login to download for sending corrections and loans. No parameter set, printer: database.

1. RLRLOGG – Need Analysis Logging Report -save, review .log.
2. REBCD15 – 2015 ISIR Corr/Req Process - Normal to **not** have a file - creates corr15in correction file (#10 – N, #11 – A) - save, review for # at the bottom. If there are any, will have corr file and must review with an advisor to see what changed and decide whether to send the corr file. An advisor will need to determine whether to make any necessary new corrections in Banner or in FAA Access.
3. REREX15 – 2014-2015 COD Extract Process - do daily, creates crdl15 file – loan extract process for COD. Save, review – wait -1st .log. If there are any errors, print and give to Rebecca. ATB errors – give to Chris. 1st .lis shows # - if none - no crdl to send.

Secure Shell - to move files from Banner to R drive, click Profile to log in.

1. Right directory window, select **banjobs**, wait, enlarge, modify 2x. May have crdl, corr, or not any.
2. Left window, R:\Financial Aid\Daily Downloads\Move To & From Banner (MT&FB).
3. Left click documents (crdl & corr – if sending) on right in Banjobs, D/D to copy to left under R…MT&FB.

Windows – Winapps R Drive – to move files from MT&FB to Daily Downloads

1. On left side, drill down: Financial Aid, Daily Downloads, MT&FB.
2. Click on MT&FB – opens on right.
3. Left click crdl, corr and move to Daily Downloads.

EdConnect – to send and receive files

1. Click in Activity box: select Send, Click in File Name, Files of type, select all files. Look for correct file and date, click, then open.
2. Message class: type in crdl15, then tab (be sure to include the #.) If you should need to delete, start with message class, shift tab to each to delete. (If have corr15 file, then there will be 2 send lines.)
3. Activity: Request, tab, Project, A/tab for All, Cycle, A/tab, Description, A/tab.
4. Transmit: click icon with 2 computers. Stay on this site.
5. Transmission successful: stops, close small x. Print P-message that pops up for Chris.
6. Check Activity Log: click on paper icon to see what came in: IDSA daily, IGCO CPS correction files, IGSA pushed automatic and IGSG system generated, ISRF requested file, and CRs for loans. May also have PGMR for Chris or Lauren.

Windows- Winapps R-Drive – to see files that came over from EdConnect and copy to MT&FB

1. Click on “Daily Download” on left and will show on right.
2. Move right scroll to bottom to see current files.
3. Highlight C files (not crps or crwb), I files, and pgmr, but not p messages. (Click top file, shift/click bottom to highlight all.) **Right** click, D/D to MT&FB, select “copy here”.

**IMPORTING FILES ON BANNER/FAPOPSEL**

Secure Shell

1. Change directory window on the Right side to **app…banner**.
2. Left directory – refresh (2 arrows)
3. Highlight all (except CRPG and PGMR) on Left, Left click and D/D to right to Banner.
4. On Right side of Secure Shell, sort by name.
5. CRPG file is for Chris: leave on left; PGMR file is for Lauren or Chris: leave on left.

E-mail Rebecca to let her know what came in today on secure shell: crsu, crbn, crdl, crrc, crecmyop, crsp, crpn, including .dat – EX: crbn15op.009 – not crps or crwb. After Rebecca replies that she is done and I files are loaded, delete C loan files and I files from Secure Shell on both sides.

Data Load - Open new Banner - FAPOPSEL

**IF ADMISSIONS IS RUNNING PROCESS FIRST, WAIT FOR EMAIL FROM DONNA TO BEGIN.**

1. RCPTP15 – Part 1 temp - Parameter set is DATALOAD \_1415, printer: database.
   1. List first I…15 file name in parameter value 03: ex: idsa15op.199.
   2. F6 to add new line, type 03, tab, replace name with the next I file. Repeat until all I files are entered. Next block, save, review .lis and then check .log at the bottom for “file not found” to see if wrong number had been used. If wrong # entered for one, do RCPTP15 again with the file that needs to be corrected. (F4 to copy previous file name.)
2. RCPMTCH – Part 2 match - Parameter set is DATALOAD \_1415, next block, save, review .lis, wait, shows # in suspension and duplicates, if any. (If desired, go to Options to print.)
3. RCRTP15 – Part 3 discrepancy report - Parameter set is DATALOAD\_ 1415, next block, save, review, options, show doc, print 5 copies (1 sided) of need .lis for Coordinator, Asst. Coord. and Verification Advisors. Print 1 copy of nslds. lis for Asst. Coord. Review errs.lis and print if needed.
4. RCRSUSP –
   1. If there are any Suspense or Duplicate: Data source EDE, **AID YEAR 1415**, next block for name, next block 3X, search for match and click on to highlight\*, click Select ID, cursor in bottom ID #, Select ID, click override – enter M, save. \*Print page for SSN or DOB issues. At the end, email screen shots (Alt/PrtScn) of RNANA and RNARS (3rd page) to Donna Newell in Admissions.
   2. If New – X back to top, N in override on 1st screen and save.
   3. Duplicate – match lowest TRN #, leave other until after Part 3 RCRTP15 and then run RCRSUSP again to match the next TRN #.
   4. Repeat RCRTP15 (Part 3)
   5. If needed, run RCRSUSP again to make sure no one else kicked out.

RCPDTMP – to delete downloaded records if there is a mistake, such as loaded twice.

RNAOV15 – to change which transaction is active

**IF FA IS RUNNING PROCESS FIRST, LET “IMPORTING” PERSON KNOW TO EMAIL DONNA NEWELL WHEN FINISHED WITH SUSPENSE**.

Batch Posting – Start with Tracking then move to Waive.

1. GLBDATA - No parameter set, FAFSA\_RECEIVED\_**1415,** save, review .log for # received.
2. RNPFM15 – Banner needs analysis, populates RNINAIQ corresponding form. Save, review 1st .lis, long wait. (Staple discrepancy reports.)
3. RORGRPS – Group Process tracking requirements. Parameter Set: Tracking\_1415, save, wait, review .lis for # in Default Tracking Group.
4. GLBDATA - No parameter set and each tracking requirement (popsel) must be run one at a time. On selection #01, click on drop down for Value. For the 1st one, enter FINAID for application, next block, look for tracking requirement, double click to select making sure creator ID and user ID are FAPOPSEL, next block, save. Review, look for completed, close. Next block 2X, repeat for each one:
   * 1. 13PTAX\_2\_STATUS\_NOT\_2
     2. 13TAX\_2\_STATUS\_NOT\_2
     3. 15DVER\_WAIVED\_HHOLD\_SIZE\_CHNGED
     4. 15IVER\_WAIVED\_HHOLD\_SIZE\_CHNGED
     5. BACH\_DEG\_RCVD\_ADM\_1415
     6. CHILDSUPPORT\_PAID\_1415
     7. COLLEGE\_XCRIPTS\_NOT\_REV\_1415, **CURRENT DATE** (#88: tab, any key, enter, next block, save.)
     8. DEP\_STUDENT\_HOH\_1415
     9. DUAL\_NEEDS\_APP\_1415
     10. EMANCIPATED\_ON\_ISIR\_1415
     11. FOOD\_STAMPS\_1415
     12. GRAD\_PROF\_ON\_ISIR\_1415
     13. GRANT\_SCHL\_INC\_1415
     14. GUARDIANSHIP\_ON\_ISIR\_1415
     15. HOMELESS\_ON\_ISIR\_1415
     16. HSHOLD\_SIZE\_WRONG\_IND\_1415
     17. IND\_HOH\_CONFLICT1\_1415
     18. LES\_1415
     19. LES\_VER\_1415
     20. MAJOR\_INELIG\_1415\_NEED\_ORIENT
     21. MAJOR\_INELIG\_1415\_REPOST
     22. Tab, Parameter set MAJOR\_STDN\_1415, save, tab, remove parameter set
     23. NONCHILD\_DEPENDENTS\_1415
     24. NO\_HS\_XCRIPT\_1415
     25. NO\_PARENT\_INCOME\_1415
     26. NO\_STUDENT\_INCOME\_1415
     27. NUM\_IN\_COLLEGE\_VER\_1415
     28. ORPHAN\_WARD\_OF\_COURT\_1415
     29. PAR\_FILED\_NO\_INCOME\_1415
     30. REINSTATE\_15NFP\_1415
     31. REINSTATE\_15NFS\_1415
     32. SSN\_NOMATCH\_ADM \_1415
     33. STU\_FILED\_NO\_INCOME\_1415
     34. VGROUP\_H\_FLAG\_PARENT\_1415
     35. VGROUP\_H\_FLAG\_STUDENT\_1415
     36. C\_FLAG\_EXISTS\_REQS\_COMPLETE (**AID YEAR**  #88: **1415**) Review
     37. C\_FLAG\_FED\_AID\_PAID (**AID YEAR 1415**) Review
     38. V4\_V5\_TO\_REPORT\_1415 Review
     39. VERIFICATION\_NO\_V (**AID YEAR 1415**) Review
5. GLIEXTR – to print reports for C\_FLAG\_EXISTS\_REQS\_COMPLETE, C\_FLAG\_FED\_AID\_PAID, V4\_V5\_TO\_REPORT\_1415, and VERIFICATION\_NO\_V lists, if any. In Selection ID, select popsel, next block for each, print. If long, use Help-Extract, open, adjust, print. Give both C-Flag lists to Kara and give V4\_V5 and Verification No V lists to Advisors by last name.
6. RORPOST
   1. First, change **AID YEAR 1415** if necessary, next block
   2. Select button “Remove all Select Indicator”
   3. At ‘category value’ type “TRACK”, then click select category button to check them all. No save.
7. RORBPST – No parameter set, **Value #1** **1415**, next block, save, review .log, long wait.

Waiving Requirements & T4 Authorizations

1. GLBDATA - The following are all saved parameter sets. For each set, double click, next block 3X, save, review.
   * 1. NEEDPSTRAN1415 (**Today’s date #88**)
     2. WAIVE13TAXR
     3. WAIVE15DVER1415
     4. WAIVE15IVER1415
     5. WAIVE15NFP\_TAX
     6. WAIVE15NFS\_TAX
     7. WAIVEADMAPP1415
     8. WAIVEASSETP1415
     9. WAIVECITIZN1415
     10. WAIVECITNON1415
     11. WAIVECOM0891415
     12. WAIVECOM0991415
     13. WAIVECOTRAN1415
     14. WAIVEDEFALT1415
     15. WAIVEDOBDAD1415
     16. WAIVEDOBMOM1415
     17. WAIVEDOBP11415
     18. WAIVEDOBP21415
     19. WAIVEDOCEMN1415
     20. WAIVEDOCGRD1415
     21. WAIVEDOCHOM1415
     22. WAIVEDOCWRD1415
     23. WAIVEFSAGCE1415
     24. WAIVEGRDPRF1415
     25. WAIVEINCSSP1415
     26. WAIVELNEXCD1415
     27. WAIVEMAJOR1415
     28. WAIVEMARCHG1415
     29. WAIVEMARITP1415
     30. WAIVEMARITS1415
     31. WAIVEOVRPAY1415
     32. WAIVEPARENT1415
     33. WAIVEPARNTS1415
     34. WAIVEPSTRAN1415 (**Today’s date #88**)
     35. WAIVEPTAX1415
     36. WAIVESELSER1415
     37. WAIVESELSERF15
     38. WAIVESSADOB1415
     39. WAIVESSANAM1415
     40. WAIVESSASSN1415
     41. WAIVESSNADM1415
     42. WAIVESSNF1415
     43. WAIVESSNM1415
     44. WAIVESSNP11415
     45. WAIVESSNP21415
     46. WAIVETAXNOTAX15
     47. WAIVEVETSTS1415
     48. WAIVE\_13PTAX
     49. WAIVE\_13TAX
     50. WAIVE\_15CSUP
     51. WAIVE\_ADHST1415
     52. WAIVE\_BACH1415
     53. WAIVE\_DOBST1415
     54. WAIVE\_DRUGS1415
     55. WAIVE\_HIEFC1415
     56. WAIVE\_NSLDS1415
     57. WAIVE\_SIGNP1415
     58. WAIVE\_SIGNS1415
     59. WAIVE\_SNAP1415
     60. WAIVE\_T4AUTH
     61. T4AUTH\_APPROVE (**AID YEAR** **#88** **1415**) Review
     62. T4DECLINE **(1415)**  Review
2. RORPOST
   1. First, **AID YEAR 1415** if necessary, next block
   2. Select button “Remove all Select Indicator”
   3. At ‘category value’ type “WAIVE”, then select category button to check them all. Also scroll down to select T4AUTH\_Approve and T4Auth\_Decline selection ID’s, **save**.
3. RORBPST - Remove parameter set, **Value #1** **1415,** next block, save, review .log.
4. TVPREQA – Creates T4 Auth from Req. Parameter set **T4AUTH\_1415**, next block, change selection date day/month to **prior** business day: highlight, type any key, enter, updates to current, change day, save, review .lis.
5. GLIEXTR – Application: FINAID, Selection ID
   1. T4AUTH\_APPROVE, Next block, print screen if list is short. If long, Help, extract, open, adjust, print, close, don’t save.
   2. T4AUTH\_DECLINE, Next block, print screen if list is short. Give lists to Kara.

**If processing two years, wait for the other person to finish file labels, initial email, and MIL letters**.

**Budget Grouping (37) can be done while waiting for other person to finish letters.**

File Labels:

1. GLBDATA – No parameter set, selection #01 Value (If none, don’t run GLBLSEL OR GLRLETR.)
   * 1. FILE\_LABELS\_1415, save, **AID YEAR 1415,** save, review.
     2. INITIAL\_EMAIL\_1415, save, **AID YEAR 1415**, save, review.
2. GLBLSEL – Use parameter set LABELS\_1415, next block 2X, **#09 change to current date**, next block, save, **AID YEAR 1415**, save, review .log. **Do not do twice.**
3. GLRLETR – Use parameter set LABELS\_1415, next block, no date, save, review .lis to check for duplicates and .doc, options, show documents.
   1. On document, File, Save As, in R:\print\finaid\banner letters, select type as text file, file name “label export.doc”, save, replace, yes.
   2. R…Banner Letters, open “file labels.docx”. Use mail merge (mailing, finish, edit, all) and print labels on FA 144 printer with labels face up/top in. Don’t save. Once printed, write today’s date on top of label page.
   3. Deliver reports and labels. Place labels on counter in file room.

Initial Email

1. Close employee email, open FA mailbox, and continue to have open for remainder of Banner process.
2. GLBLSEL – Use parameter set INIT\_EMAIL1415, next block 2X, **#09 change date to current**, next block, save, **1415**, save, review .log. Check to see if there are any that did not process.
3. GLRLETR – Use parameter set FA\_INITIALEMAIL, **#12 AID YEAR 1415,** save, review .lis to check for duplicates and .doc, options, show document.
   1. On document, File, Save As, in R:\print\finaid\Banner Letters\Initial email merge files, save as type: text file, file name: “initial email data.doc”, save, replace, yes.
   2. Open document in R:\print\finaid\Banner Letters\initial email merge files, “initial email.docx”, open.
   3. Mailings, edit recipient list, GC – ALL and Personal – ALL, OK, finish/merge, edit, all, optional: proofing off, and save as, in R:\print\finaid\Banner Letters, docx file named

“initial email **1415** XXXX201X.docx”, save, close.

* 1. On original, edit recipient list, GC - ALL and Personal – NONBLANKS, to send personal email first, OK.
  2. Finish and merge, send email, select personal email, subject: 2014-2015 Financial Aid Information, close.
  3. Back to original, edit recipient list - change Personal to ALL and GC email to NONBLANKS, OK.
  4. Finish and merge, send email, select GC email, subject: 2014-2015 Financial Aid Information.
  5. Back to original, close, don’t save.
  6. In FA mailbox, move sent letters to “1415” box or wait until finished with all letters. (Select top one and shift/select last one, D/D.)

MIL Letter #1

1. GLBDATA – No parameter set, Value Selection ID is MIL\_PKG\_FIRST, save, **#88** **AID YEAR 1415**, save, review.
2. GLBLSEL - Parameter set FA\_MIL\_PKG1, **#8 AID YEAR 1415,** next block, save, **AID YEAR 1415**, save, review .log. Check to see if there are any that did not process.
3. GLRLETR - Parameter set FA\_MIL\_PKG1, next block, **#12 AID YEAR 1415,** save, review .lis to check for duplicates and .doc, options, show doc, yes.
   * 1. File, Save As, in R:\print\finaid\Banner Letters\mil pkg1 merge files, text file,

“mil pkg1 data file.doc”, save, replace, yes.

* + 1. In R:\Print\Finaid\Banner letters\mil pkg1 merge files, open “MIL req for pkg1 no emails listed.docx,” mailings, finish & merge, edit, all. **Keep in mind it is normal to have none of these.**
       1. Save as, in Banner Letters, docx file, “mil pkg1 **1415** XXXX201X mailed.docx”.
       2. Print one copy, close, and mail letters.
    2. In R:\Print\Finaid\Banner letters\mil pkg1 merge files, open “MIL req for pkg1 personal email.docx,” mailings, finish, merge, edit, all, OK.
       1. Save as, in Banner Letters, docx file, “mil pkg1 **1415** XXXX201X personal email.docx”, save, close.
       2. At original document, mailings, finish & merge, send email messages:

Personal, 2014-2015 Financial Aid Information, OK.

* + - 1. Close, don’t save.
    1. In R:\Print\Finaid\Banner letters\mil pkg1 merge files, open “MIL req for pkg1 GC email.docx,” mailings, finish & merge, edit, all.
       1. Save as, in Banner Letters, docx file, “mil pkg1 **1415** XXXX201X gc email.docx” in Banner Letters, save, close.
       2. At original document, mailings, finish, merge, send email messages:

GC, 2014-2015 Financial Aid Information, OK.

* + - 1. Close, don’t save.

MIL Letter #2

1. GLBDATA – No parameter set, Value Selection ID is MIL\_PKG\_SECOND, save, **AID YEAR 1415**, save, review.
2. GLBLSEL - Parameter set FA\_MIL\_PKG2, next block, **# 8 AID YEAR 1415,** save, **AID YEAR 1415**, save, review .log. Check to see if there are any that did not process.
3. GLRLETR - Parameter set FA\_MIL\_PKG2, next block, **# 12 AID YEAR 1415,** save, review .lis to check for duplicates and .doc, options, show doc.
   * 1. File, Save As, in R:\Print\Finaid\Banner Letters\mil pkg2 merge files, text file,

“mil pkg2 data file.doc, save, replace, yes.

* + 1. In R:\Print\Finaid\Banner letters\mil pkg2 merge files, open “MIL req for pkg2 NO EMAILS LISTED.docx”, finish & merge, edit, all. **Keep in mind it is normal to have none of these.**
       1. File, Save As, in Banner Letters, docx file “mil pkg2 **1415** XXXX201X mailed.docx”.
       2. Print, close, and mail letters.
    2. In R:\Print\Finaid\Banner letters\mil pkg2 merge files, open “MIL req for pkg2 PERSONAL EMAIL.docx,” mailings, finish & merge, edit, all.
       1. File, Save as, in Banner Letters, docx file, “mil pkg2 **1415** XXXX201X personal email.docx”, save, close.
       2. At original document, mailings, finish & merge, send email messages:

Personal, 2014-2015 Information Needed for Financial Aid.

* + - 1. Close, don’t save.
    1. In R:\Print\Finaid\Banner letters/mil pkg2 merge files, open “MIL req for pkg2 GC EMAIL.docx,” mailings, finish & merge, edit, all.
       1. File, Save As, in Banner Letters, docx file, “mil pkg2 **1415** XXXX201X gc email.docx”, save, close.
       2. At original document, mailings, finish & merge, send email messages:

GC, 2014-2015 Information Needed for Financial Aid.

MIL Letter #3

1. GLBDATA – No parameter set, Value Selection ID is MIL\_PKG\_THIRD, save, **AID YEAR 1415**, save, review.
2. GLBLSEL - Parameter set FA\_MIL\_PKG3, next block, **# 08** **AID YEAR 1415**, save, **AID YEAR 1415**, save, review .log. Check to see if there are any that did not process.
3. GLRLETR - Parameter set FA\_MIL\_PKG3, next block, **#12** **AID YEAR 1415,** save, review .lis to check for duplicates and .doc, options, show doc.
   * 1. File, Save As, in R:\Print\Finaid\Banner Letters\mil pkg3 merge files, text file “mil pkg3 data file.doc”, save, replace, yes.
     2. In R-Banner letters\mil pkg3 merge files, open “MIL req for pkg3.docx,” mailings, finish & merge, edit, all.
     3. File, Save As, in Banner Letters, docx file, “mil pkg3 **1415** XXXX201Xmailed.docx”, print, one-sided, close, and mail.

MIL DISB Letter #1

1. GLBDATA – No parameter set, Value Selection ID is MIL\_DISB\_FIRST, save, **AID YEAR 1415**, save, review.
2. GLBLSEL - Parameter set FA\_MIL\_DISB1, next block, **# 8 AID YEAR 1415,** save, **AID YEAR 1415**, save, review .log. Check to see if there are any that did not process.
3. GLRLETR - Parameter set FA\_MIL\_DISB1, next block, **# 12 AID YEAR 1415,** save, review .lis to check for duplicates and .doc, options, show doc.
   * 1. File, Save As, in R:\Print\Finaid\Banner Letters\mil disb1 merge files, text file,

“mil disb1 data file.doc”, save, replace, yes.

* + 1. In R:\Print\Finaid\Banner letters\mil disb1 merge files, open “MIL req for disb1 PERS email.docx,”, mailings, finish & merge, edit, all.
       1. File, Save As, in Banner Letters, docx file, “mil disb1 **1415** XXXX201X personal email.docx”, save, close.
       2. At original document, mailings, finish & merge, send email messages:

Personal, 2014-2015 MISSING INFORMATION FOR FINANCIAL AID.

* + - 1. Close, don’t save.
    1. In R:\Print\Finaid\Banner letters/mil disb1 merge files, open “MIL req for disb1 GC email.docx,” mailings, finish & merge, edit, all.
       1. File, Save As, in Banner Letters, docx file, “mil disb1 **1415** XXXX201X gc email.docx”, save, close.
       2. At original document, mailings, finish & merge, send email messages:

GC, 2014-2015 MISSING INFORMATION FOR FINANCIAL AID.

* + - 1. TURN PROOFING ON.
      2. Close, don’t save.

1. Steps 35 and 36 can be completed while waiting for some of the next Budget Grouping steps to process. In FA mailbox move sent letters to “1415” box. (Select top one and shift/select last one, D/D.)
2. Answer any emails that have come into the Financial Aid email box or forward them to the appropriate counselor. Close FA mailbox.

Budget Grouping

1. GLBDATA
   1. Parameter set RDY\_4\_PELL\_1415, save, **1415**, review.
   2. Parameter set RDY\_4\_EPI1415, save, **1415**, review.
   3. Remove parameter set, next block, value #1, RECALC\_PERIOD\_BUDGET\_1415, save, review.
2. RBRPBGP – Period Budget Grouping Process
   1. Parameter set BUDGET\_1415, save, review .lis, long wait. Let Chris know about any increases in Default Budget Group.
   2. Parameter set BUDGET\_EPI\_1415, save, review .lis, Let Chris know about any increases in Default Budget Group.
   3. If there are increases, check ROIGRPI on own login to see list of students and determine reason.
3. RORGRPS - Parameter set PCKG\_GROUP\_1415, save, wait, review .lis. Let Chris know about any in Must Review.
4. RBRPBRC – Period Budget Recalc Process - Parameter set RECALC\_BUD\_1415, save, review .log, long wait.
5. RPEPELL -Pell Calc
   1. Parameter set PELL\_1415, save, review .log, long wait, options, show doc, print Pell reject list for Assistant Coordinator.
   2. Parameter set PELL\_EPI\_1415, save, review .log, options, show doc, print EPI Pell reject list for Assistant Coordinator.
6. Close FAPOPSEL.

**Email screen shots (Alt/PrtScn) of RNANA and RNARS (3rd page) to Donna Newell in Admissions if there were any SSN or DOB issues.**