

## Student Revenue Data Submission

Prepared by Dan Maguffin

### **General Information**

- Data for Office of Institutional Research
- Used in Cost Calculator (HEOA)
- 2 submission periods for each academic year:\*\*\*
- Jan 1– Jun 30 due September 1
- Jul 1 Dec 31 due March 1 (the following year)
- ALL DATES ARE FINAL LOCKING DATES!

Make sure to submit earlier than dates listed so that errors may be fixed before the Final Locking Date

\*\*\* Re-Write underway for annual submissions (2015?)\*\*\*

 NOTE: The TSRYSRD process must be run for one submission period at a time. Do not run multiple submissions.

### SET UP

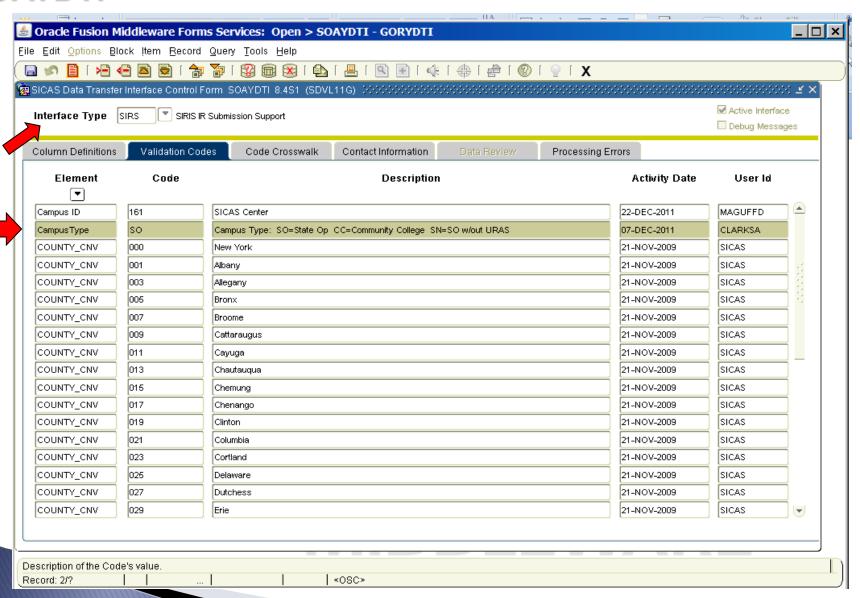
### SOAYDTI

SIRS interface type
Validation Code tab
Update the Campus Type Element

- •SO= State Operated campuses;
- •CC= Community Colleges;
- •SN= State operated campuses that DO NOT use the SICAS URAS Setup.

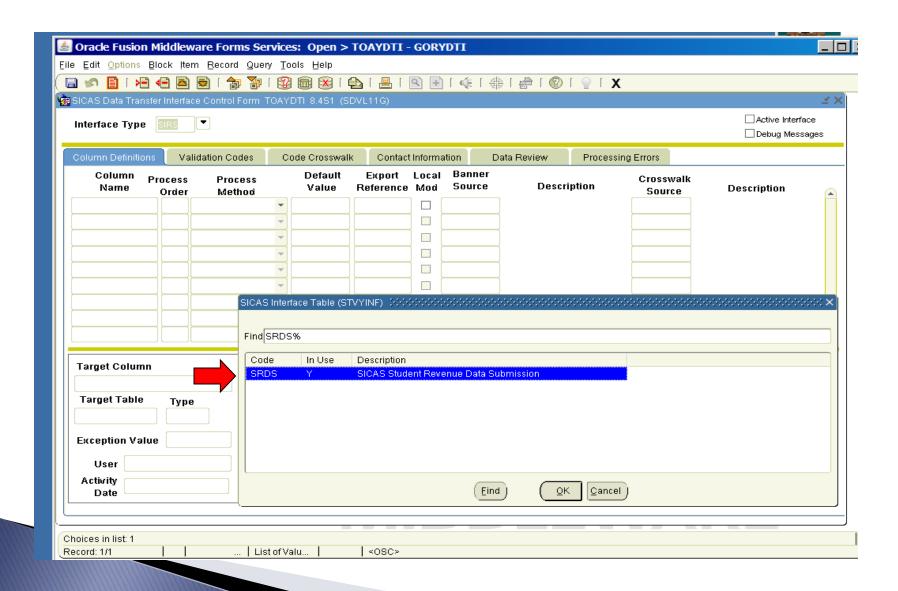
  Make sure you Save!
- •This entry on SIRS will allow the program to decide what data to collect based on what type of campus you are.
- •Make sure you Save! Make sure you Save! Make sure you Save! Make sure you Save!

### SOAYDTI

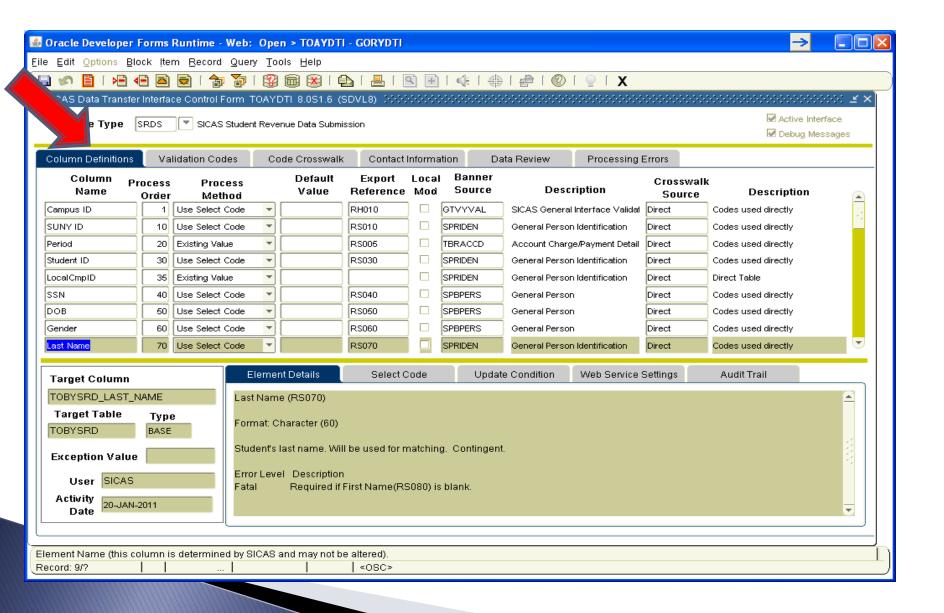


### Set Up

# **TOAYDTI Interface Type SRDS**

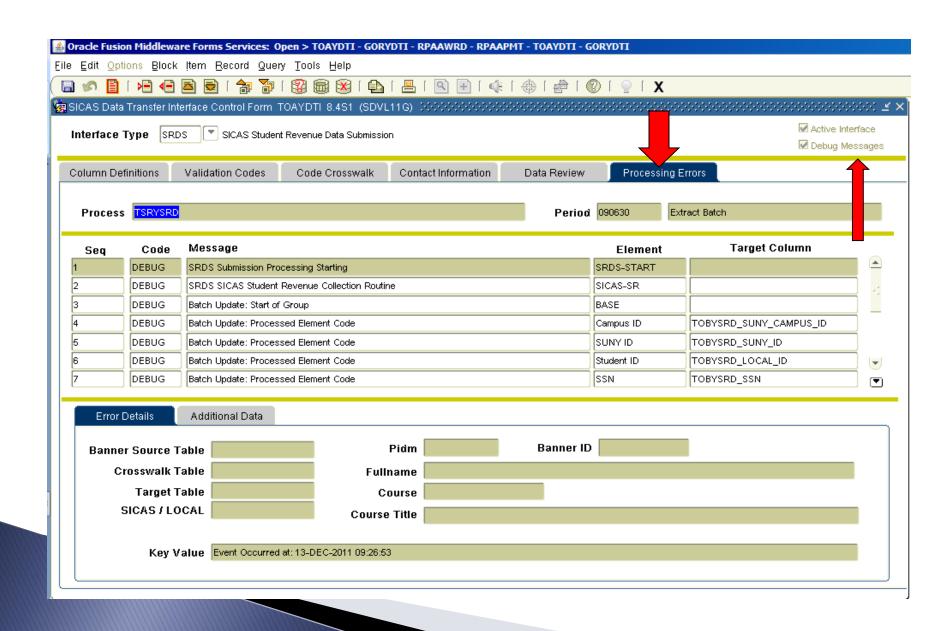


### **TOAYDTI - Column Definitions Tab**



### **TOAYDTI - Processing Errors Tab**

This is delivered NOT CHECKED. You MUST check it.



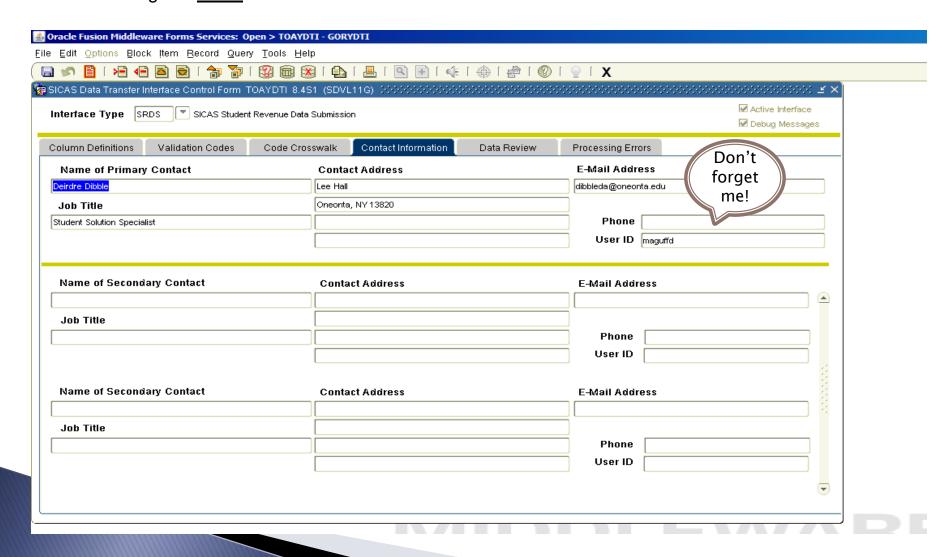
### **TOAYDTI - Contact Information**

Enter Primary (required) and Secondary (optional) on the Contact Information tab.

#### **USER ID IS REQUIRED!**

\*\*\*\*\*Primary Contact and USER ID required for SRDS\*\*\*\*\*.

Omitting this WILL result in a transmission failure\*\*\*\*\*\*\*\*\*\*



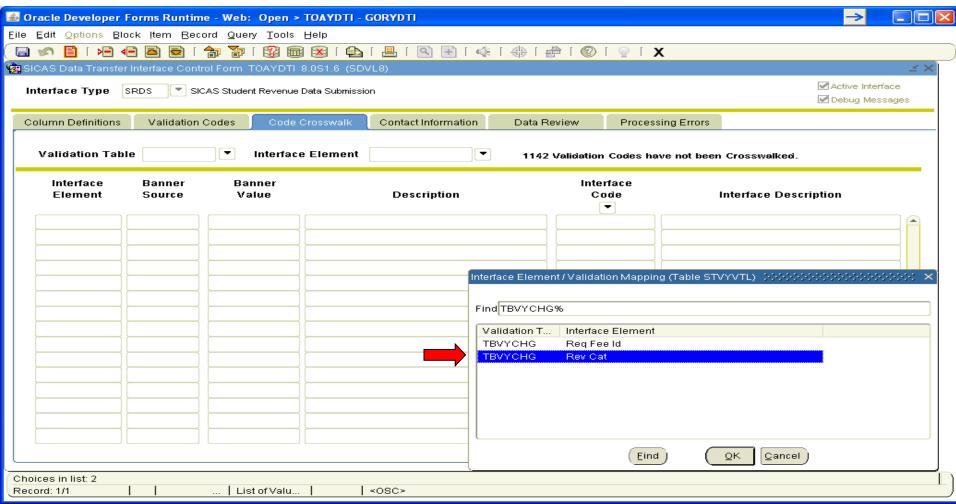
### Code Crosswalk Tab Rev Cat

Perform all required crosswalks on the Code Crosswalk tab of the TOAYDTI form including all data elements that have a Crosswalk Source of GTVYVAL.

- (Rev Cat)
- Rollback and then click on the drop down box to select an Interface Element;
- Validation Table drop down box (TVVYCHG Table appears);
- Select an Interface Element from the Interface Element/Validation Mapping Table (STVYVTL)

## Code Crosswalk Tab Rev Cat

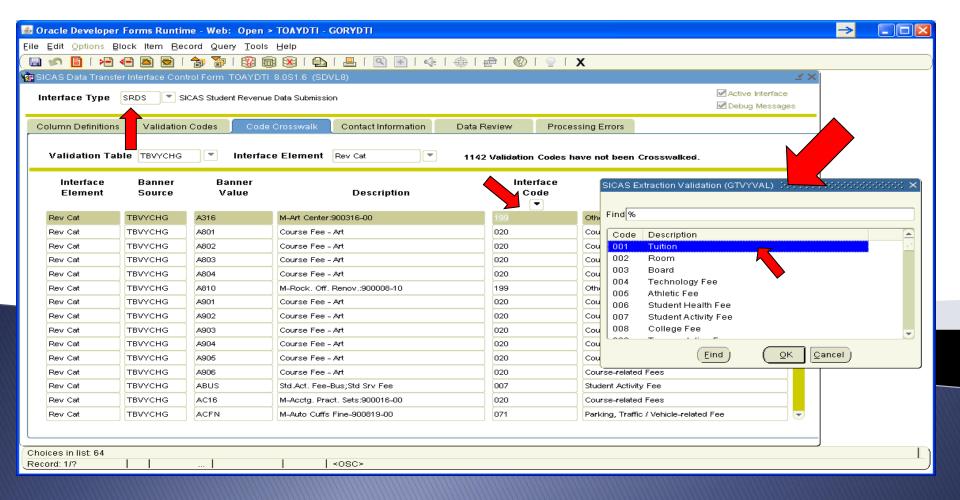
- Select an Interface Element from the Interface Element/Validation Mapping Table (STVYVTL)
- Select Next Block to populate



### **Code Crosswalk Tab**

### **Rev Cat**

- Highlight the item to be crosswalked, by clicking in the Interface code column;
- Click on the Interface Code drop down box (GTVYVAL appears)
- Select an Interface Code from the SICAS Extraction Validation GTVYVAL
- Click OK



## Code Crosswalk Tab Rev Cat

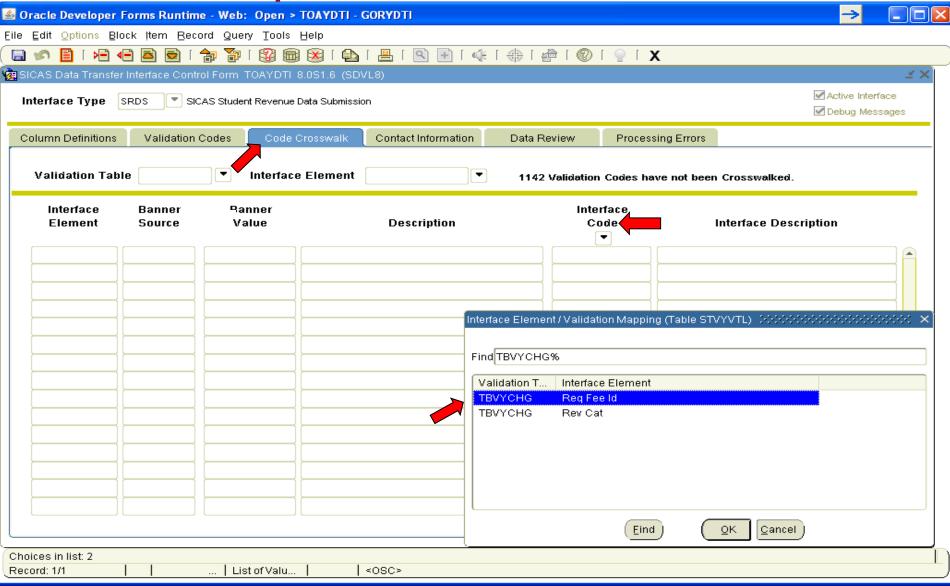
\*\*\*\*\*\*\*If a course fee is not attached to a course section, it does not get cross walked.

\*\*\*\*\*\*\*If a detail code does not map to a valid System Admin revenue category it should be mapped to NA.

\*\*\*\*\*\*\*If a detail code does not have a valid URAS Code (3000-4000 series) the Interface Code value of NA must be assigned.

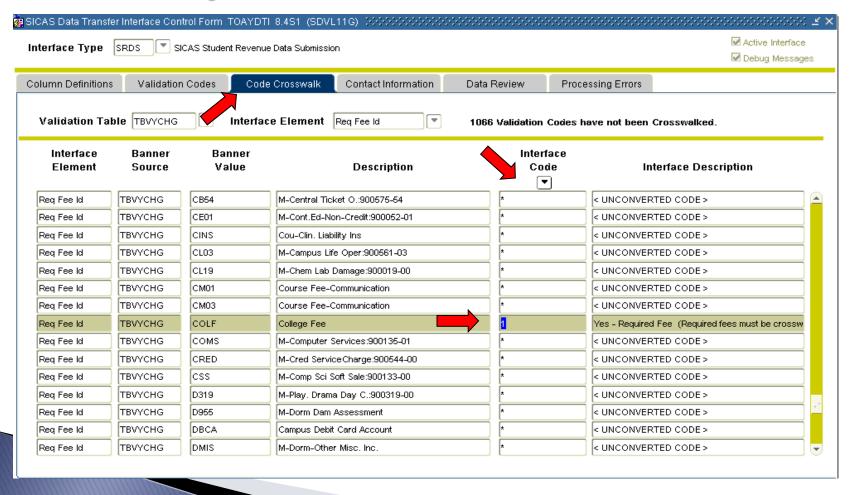
**Community Colleges**: Should change the URAS code on the column definitions tab of TOAYDTI to Force to NULL.

# Code Crosswalk Tab Required Fee ID

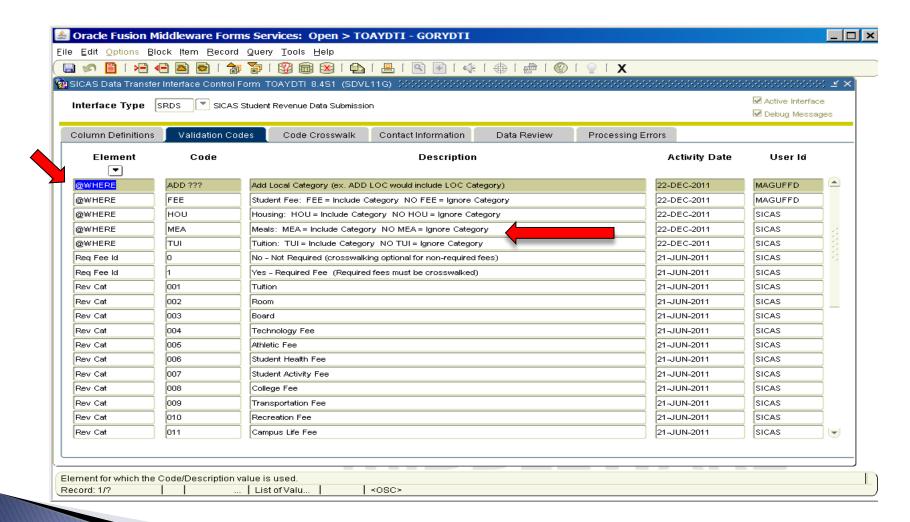


## Code Crosswalk Tab Required Fee ID

Interface code defaults to '0' = Not Required. ONLY Crosswalk Fee Detail Codes required for ALL Students and change '\*' to "1".



### Validation Codes:



### Validation Codes: @WHERE

@WHERE Validations are the only validation codes most campuses need to change.

Each @WHERE allows a campus to control the automatic inclusion of Students based on specific Detail Code Categories.

- @WHERE FEE -- Change to NO FEE to prevent FEE category from selecting students.
- @WHERE HOU -- Change to NO HOU to prevent HOU category from selecting students.
- @WHERE MEA -- Change to NO MEA to prevent MEA category from selecting students.
- @WHERE TUI -- Change to NO TUI to prevent TUI category from selecting students.

Changing these can lead to not selected students that happen to have transactions for periods that they DO NOT appear in SDS Submissions for. SDS membership is the only other criteria used to select student PIDMs into the population.

- @WHERE ADD ??? -- This is a "blank" setup that allows the campus to add their own category to the list of auto selectors:
- @WHERE STU -- This would make a local "STU" category select students.

### Validation Codes: Rev Cat & URAS Code

The Validation Codes for these two items were shipped with all of the valid System Admin values available when SRDS was initially released. New codes added over time would be entered by each campus using this form's Validation Codes tab.

Never enter values that are not valid System Admin approved values as any crosswalk that includes "campus invented" values will result in FATAL ERRORs when submitted.

### TSRYSRD only submit ONE submission period per batch

Always run in AU, AR, TU, TR or DB until ready to Post Batch. Once run in PO the batch is locked and posted.

≦ Oracle Developer Forms Runtime - Web: Open > GJAPCTL	
File Edit Options Block Item Record Query Tools Help	
	X
🗽 Process Submission Controls GJAPCTL 8.3.0.2 (SDVL8) 000000000000000000000000000000000000	00000000000000000000000000000000000000
Process: TSRYSRD ▼ SICAS Student Revenue Parameter Set:	▼
Printer Control	
Printer: DATAB. Enter the academic year being processed in Banner format  Special Pr  JUN = January 1 - June 30  DEC = July 1 - December 31	Lines: 60 Submit Time:
Parameter Values Number Parameters	Values
Number	▼
01 Academic Year 2007	
02 Reporting Month JUN	
03 Run Mode TR	
89 Batch ID - DO NOT USE	
AR = Audit Batch Replace	
AU = Audit Batch Update	
CT= Collect Transaction	ns 🔻 🔻
LENGTH: 4 TYPE: Character O/R: Required M/S: Single  DB = Delete Batch  DO Dood Botch	
PO = Post Batch TR = Batch Replace & Tra	ansmit .
TU = Batch Update & Trai	
Submission	
□ Save Parameter Set as Name: Description:	○ Hold ® Submit
Parameter Number; press SEARCH for valid parameters.	
Record: 144	

### TSRYSRD RUN MODES

- 1. Collect Transactions \*\*\*CT\*\*\* (new)
  - Looks/retrieves TBRACCD raw transactional data to assist in TSAAREV analysis.
  - ➤ Includes "ALL" types of transactions

#### Audit

Audit Replace (AR) and Audit Update (AU)

#### Transmit

- Transmit Replace (TR) run corrections, deletions, etc for a batch. Replace/Remove Batch and Transmit
- Transmit Update (TU) Add Updates to Batch and Transmit. Used to ADD additional records to the batch

#### TSRYSRD POST BATCH

Review errors on the Processing Errors tab of the TOAYDTI form and make corrections as needed.

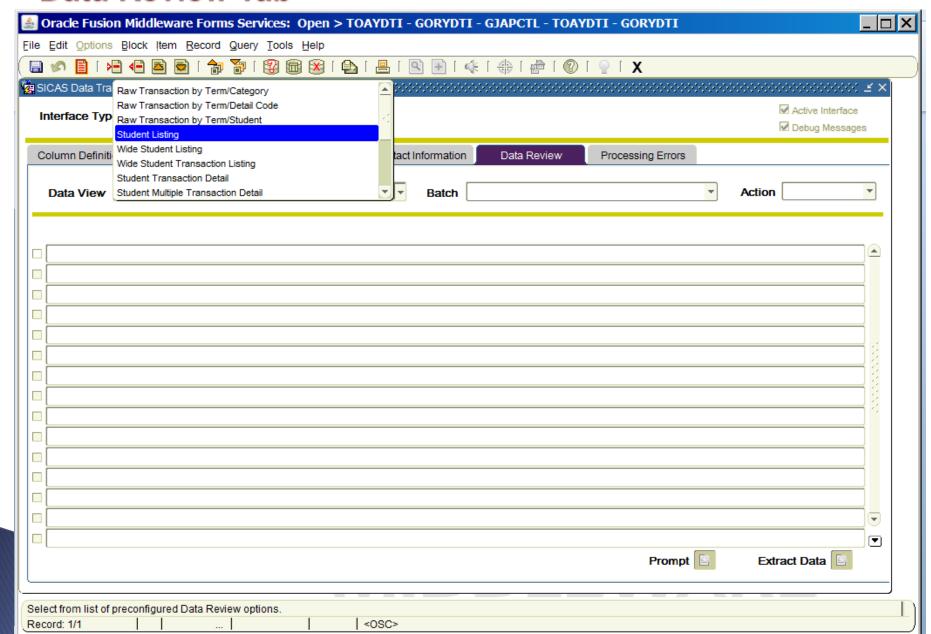
- Use TU to send corrected data
- Use SUNY System Administration Web page to review (SRDS Dashboards) and Lock the batch for Approval.
- If necessary, resolve any problems identified by SUNY IR staff, have the IR Staff un-lock your batch, then re-transmit and re-lock the batch.
- After batch locked, SUNY IR staff will review and approve the batch.
- Once approved by SUNY IR, no changes can be made to this batch.
- An overnight process will run to export the data at SUNY. Once data is exported, you can post the batch in banner.
- \*\*\*\*\*\*\*\*YOU MUST RUN TSRYSRD in Post Update (PO) to update the Data Posted flag on the SICAS Student Data Submission extract tables\*\*\*\*\*\*\*\*\*\*

### **TSRYSRD** New Processing Flow

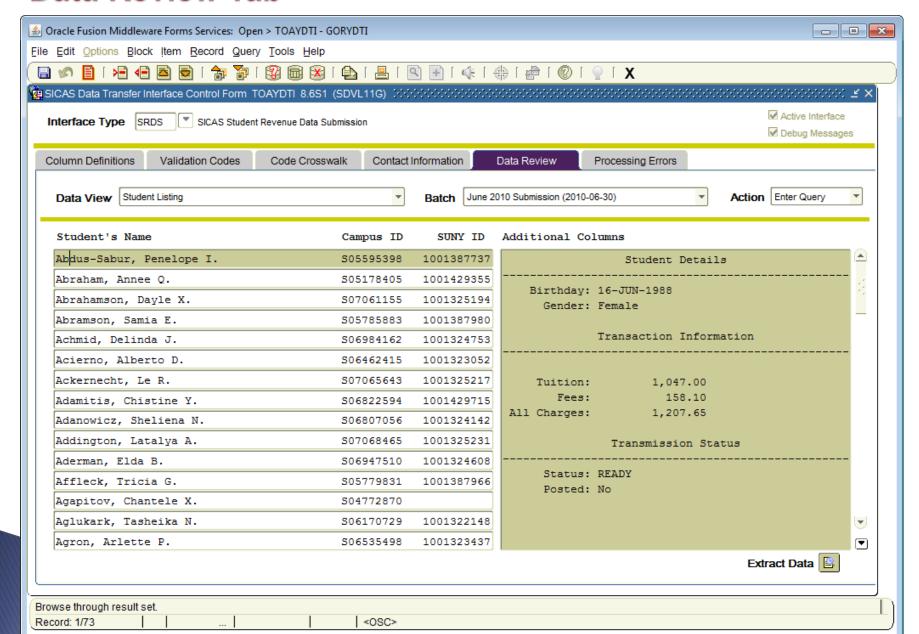
The processing flow will be changing. This is a discussion of new version of TSRYSRD being tested at SICAS currently. This new version will be available before Annual Submissions are supported by System Administration. The changes are improve processing speed.

- Each submission will now require an initial run in CT mode: Collect Transactions.
  - Once CT mode has been run for a term it should never need to be run again. This collects
    all of the transactions for the period—not just the ones we are interested in sending. These
    can be reviewed immediately using the first three Raw Transaction views on the Data
    Review tab. None of the other data review items are useful at this point.
- Run the submission in AR mode (all of the other views become useful).
- Review Data for accuracy and completeness and adjust setup until the data is complete.
- Run the submission in TR and/or TU mode correcting errors returned from System Admin.
  - Note that TU mode will now work as it should. Options to resend persons, detail codes, URAS Codes and Transaction Terms will be added to the submission.
- Once the submission is complete and errors have been corrected LOCK the submission.
- Once APPROVED by SUNY IR and EXPORTED, run TSRYSRD in PO mode (Post).

### **Data Review Tab**



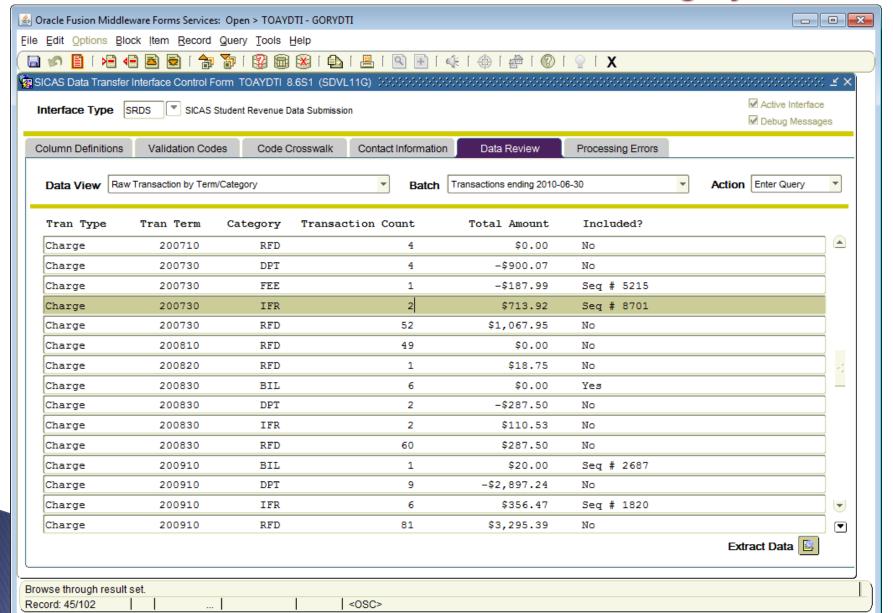
### **Data Review Tab**



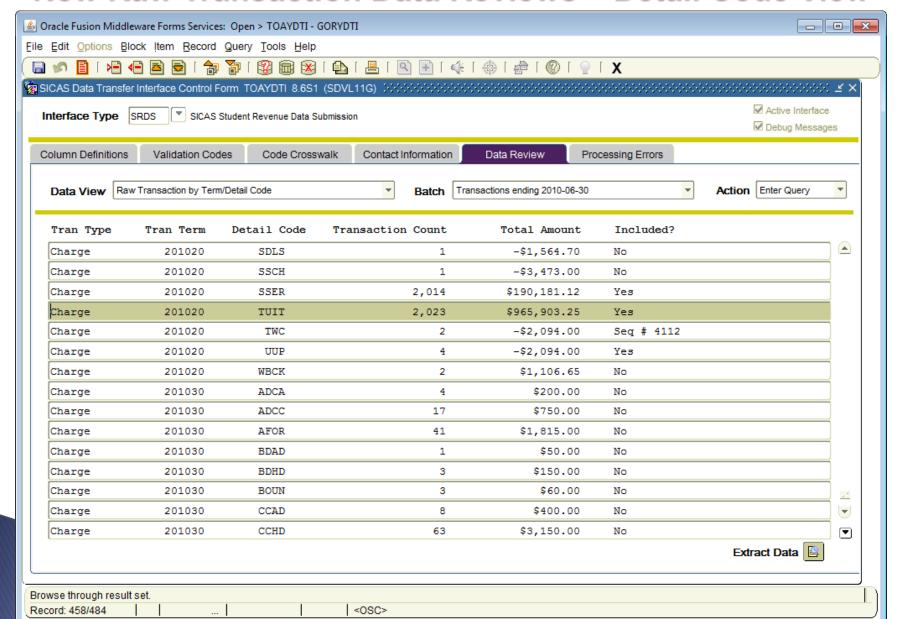
### **Data Review – Extract Data**

ssistance	Resize Column	ns for Data Display		01	03	04	05	06	07 TOBYSRD 28
ool rooloxiiloo	Campus	Last, First M (LFM)	•	TORYSRD_	TORYSRD_DETAIL	TORYSRD_URAS_C	TORYSRD_REVE	TOBYSRD_SU	TOBYSRD_SUBMIT_STATUS
tions	Campus ID	Student Name		Tran_Numt	Detail_Code	Uras_Code	Revenue_Charge	Suny_ld	Submit_Status
ımn	S03156119	Teieny, Kaylee M	1	1	TUIT	3114	1047		SUCCESS
ımn	S03156119	Teieny, Kaylee M		1	SSER	3380	158.1		SUCCESS
=	S03156119	Teieny, Kaylee M		1	COLF	3134	2.55		SUCCESS
Column	S05779593	Calby, Prescott R		1	DORM	3814	2825		SUCCESS
	S03156119	Teieny, Kaylee M		1	LPAY	3183	30		SUCCESS
je Query	S03180769	Formica, Leisha O		1	LPAY	3183	30		SUCCESS
	S03180769	Formica, Leisha O		1	TUIT	3114	622		SUCCESS
ecord	S03180769	Formica, Leisha O		1	COLF	3134	4.85		SUCCESS
Options	S03180769	Formica, Leisha O		1	SSER	3380	157.7		SUCCESS
$\stackrel{\cdot}{=}$	S06624408	Pendyala, Crissy W		1	COLF	3134	5.1		SUCCESS
t Data	S06624408	Pendyala, Crissy W		1	TUIT	3114	1242		SUCCESS
Data	S06624408	Pendyala, Crissy W		2	LPAY	3183	60		SUCCESS
opulation	S06624408	Pendyala, Crissy W		1	SORI	3380	65		SUCCESS
- Condition	S06624408	Pendyala, Crissy W		1	SSER	3380	316.2		SUCCESS
Tracking	S04112862	Hu, Merrily A		1	FIPP	3380	35		NO-SRDS
ug Info	S05283346	Kukulka, Rebecka D		4	LPAY	3183	120		NO-SRDS
	S04112862	Hu, Merrily A		1	TWC	3114	-250		NO-SRDS
Extract	S05623975	Winstone, Lydell T		1	FIPP	3380	25		NO-SRDS
Extract									
Form									

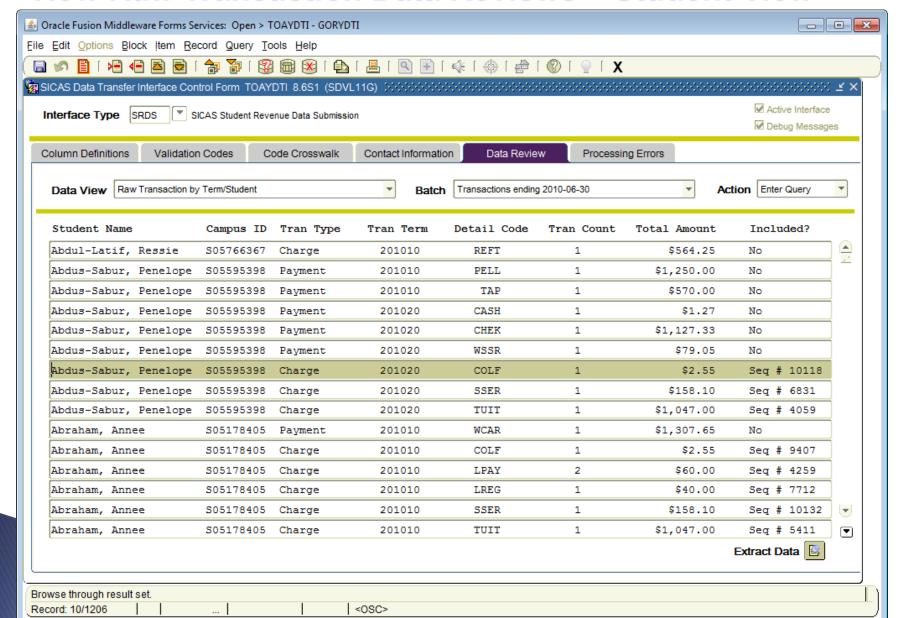
### **New Raw Transaction Data Reviews – Category View**



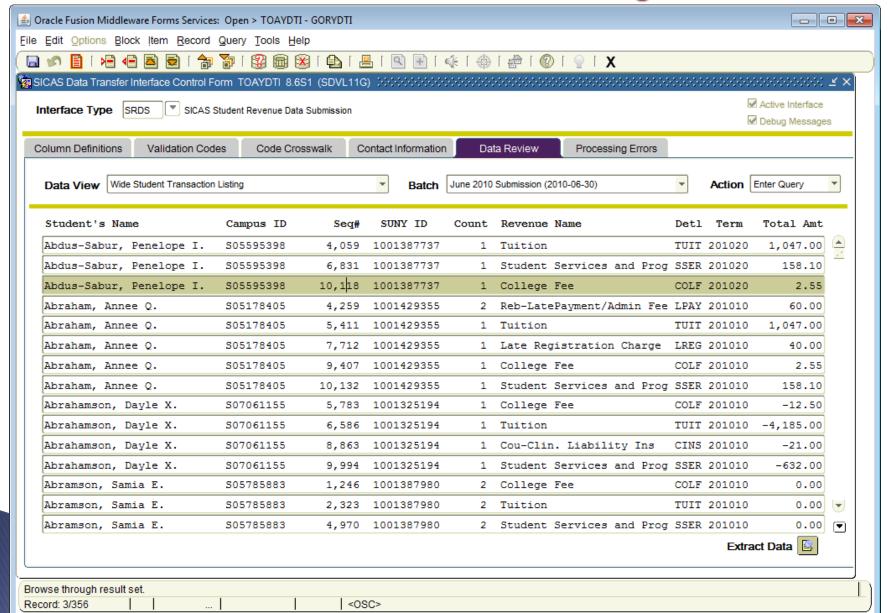
### **New Raw Transaction Data Reviews – Detail Code View**



### **New Raw Transaction Data Reviews – Student View**



### **Altered Wide Student Transaction Listing View**



### Reference

Confluence:

http://confluence.itec.suny.edu

### **Contact Information**

SICAS Center sicascen@oneonta.edu (607) 436-2029

SICAS Web Site http://sicas.suny.edu

