# BANNER COMMITTEE PROCEDURE

## WORKING THE REGISTERED NOT PAID PROCESS (PURGE)

It is recommended that the purge process be run to comply with the TCSG Tuition and Fee Policy. This process removes the registration information for each student that has an unpaid balance or has a balance over the amount of any pending financial aid or third party payment that is expected for the term. The SFAREGS screen for students who have been purged will no longer show any data for the term. Purged students should not be allowed to attend class, since they are no longer registered.

Before beginning this process, make sure that financial aid disbursements (RPEDISB) has been run.

To begin the purge process, first run the application of payments process (TGRAPPL).

Next, run TSRTBIL in the invoice mode. This process will update the Memo Balance on any students who have a Third Party.

Next, run TSRCBIL in the invoice mode. This process will update the Memo Balance on any students who have fee waivers.

Next, run the process ZFRCOMT. This process will cause the Acceptance flag on the student's SFAREGS screen to change to "Accepted" for all registered students who made payments resulting in a zero balance, or who have enough financial aid or third party payments to cover their charges. Students who are Accepted (or Committed) by this process will not be purged.

To run the ZFRCOMT process, enter ZFRCOMT on the landing page, then press Go.

Parameter 01 - Enter the appropriate term

Parameter 02 - Enter Y if you <u>do not</u> want non-credit students (i.e. continuing ed) to be purged.

Parameter 03 - Enter Y if you would like to see the amount of outstanding fees for students who are not committed by this process.

Parameter 04 - Enter Y to delete any null registration records prior to running this process.  (It is recommended that you do this).

Parameter 05-Enter Y if you would like to see the students who are committed during this process.

Parameter 06-Enter Y if you would like to create a text file during this process.  Creating a text file will simplify the process of creating an excel spreadsheet and manipulating the data for further analysis.

Parameter 07 - Enter Y to run this process in Update mode.  (N runs in audit mode).

Parameters 08 – 15 are for use with population selections (popsels) only.  Leave these parameters blank unless using a popsel (Parameters 08-11) or creating a popsel (Parameters 12-15).  If you wish to include those students on ZFRCOMT with a status of "Verify Student Balance" in your output popsel, enter a Y for Parameter 15.   It is always wise to run in audit mode first when using a popsel.

Parameter 16-Enter Y to commit students for the current term who have an outstanding balance for a prior term.

Review the output from the ZFRCOMT process to ensure the correct students were committed.  Make sure to run in update mode (Y on parameter 05) before running the purge process.  Student with a status of "Verify Student Balance" will probably need to be analyzed.  This typically means that the student has been previously committed; however the student now has more charges than pending payments.

Next, run the ZSPTERM report.  This report shows all students with outstanding balances unpaid by the student, financial aid, or third parties.  These are the students you would normally want purged.  However, this report must be reviewed to ensure all third parties, scholarships, and other payments have been entered into Banner so that no student is purged in error.

To run the ZSPTERM report, enter ZSPTERM on the landing page, then press Go.
Parameter 01 - Enter the term.
Parameter 02 - Enter a date which will be early enough to capture all potential payments and charges for the term.



The ZSPTERM report will look like this when run:
Students with balances (excluding Chg/Pymt E Pay-Types) for 202112 and dates >= 01-JAN-2000



The column on the far right shows the student balance after all pending aid, third

party payments, and student payments are applied.  You may want to check your list for special groups such as high school students or prisoners who you do not wish to purge.

If a student has been committed in error, the ZUNCOMMIT process must be used to reverse the flag.
Parameter 01 – Enter the term.
Parameter 02 – Enter the student ID number
Parameters 03 – 06 are for popsel use only.  These should be left blank unless you have a specific popsel of students you want to un-commit.
Parameters 07 – Update (Y/N) – Always run in audit mode first, verify data and then run in Update Mode.



To ensure that all students with billing hours are committed, set up the following population selections for verification.

1. Make sure a current ZSPTERM has been run.
2. Run GLBDATA (see below, use your creator id).
3. Check in GLAEXTR ----  COMMIT_THESE.  Verify.
4. Run ZCOMMIT with the popsel   (COMMIT_THESE, AR, USERID, CREATOR).

**Process Submission Controls GJAPCTL 9.3.21 (PROD-PEL)**

Process: GLBDATA  Population Selection Extract  Parameter Set:

**▼ PRINTER CONTROL**

| | | | | | |
|---|---|---|---|---|---|
| Printer | DATABASE ... | Submit Time | | PDF Font Size | |
| Special Print | | MIME Type | Plain Text ▾ | Delete After Days | |
| Lines | 55 | PDF Font | ... | Delete After Date | |

**▼ PARAMETER VALUES**

| Number * | Parameters | Values |
|---|---|---|
| 01 | Selection Identifier 1 | NOT_PAID |
| 02 | Selection Identifier 2 | WITH_BALANCE |
| 03 | New Selection Identifier | COMMIT_THESE |
| 04 | Description for new selection | Run through ZCOMMIT |
| 05 | Union/Intersection/Minus | M |
| 06 | Application Code | AR |
| 07 | Creator ID of Selection ID | TMOORE |
| 08 | Detail Execution Report | |

⊲ ◁ 1 of 1 ▷ ⊳  10 ⌄ Per Page

LENGTH: 30 TYPE: Character O/R: Required M/S: Single
Population Selection Creator ID.

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**Process Submission Controls GJAPCTL 9.3.21 (PROD-PEL)** 🗋 ADD

Process: ZCOMMIT  Flips the Flag to C  Parameter Set:

**▼ PRINTER CONTROL**

| | | | | | |
|---|---|---|---|---|---|
| Printer | DATABASE ... | Submit Time | | PDF Font Size | |
| Special Print | | MIME Type | None | Delete After Days | |
| Lines | 55 | PDF Font | ... | Delete After Date | |

**▼ PARAMETER VALUES**

| Number * | Parameters | Values |
|---|---|---|
| 01 | Term | 202112 |
| 02 | Student ID | |
| 03 | Selection Identifier | COMMIT_THESE |
| 04 | Application Code | AR |
| 05 | Creator Id | TMOORE |
| 06 | User | TMOORE |
| 07 | Update(Y/N) | N |

⊲ ◁ 1 of 1 ▷ ⊳  10 ⌄ Per Page

LENGTH: 30 TYPE: Character O/R: Optional M/S: Single
Enter USER ID

**▼ SUBMISSION**

| | | | |
|---|---|---|---|
| | ☐ Save Parameter Set as | Hold / Submit | ○ Hold  ⦿ Submit |
| Name | Description | | |

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# Population selections for the above GLBDATA process (use your CREATOR id):

**Population Selection Definition Rules GLRSLCT 9.3.18 (PROD-PEL)**  🗋 ADD  🗎 RETRIEVE  👥 RELATED  ⚙ TOOLS

Application: AR  Selection ID: NOT_PAID  Creator ID: TMOORE    Start Over

**▼ SELECTION DESCRIPTION**     ➕ Insert  ➖ Delete  📋 Copy  🔻 Filter

| | |
|---|---|
| Description | Students with an N flag |
| | ☐ Manual |
| | ☐ Locked |

☐ Delete
☐ Application Level Rules Exist

**▼ DEFINITION**     ➕ Insert  ➖ Delete  📋 Copy  🔻 Filter

| | |
|---|---|
| Select | SFBETRM_PIDM |
| From | SFBETRM,SFRSTCR |

**▼ RULES**     ➕ Insert  ➖ Delete  📋 Copy  🔻 Filter

| '(' | Object or Data Element | Operator * | Value | ')' | AND / OR |
|---|---|---|---|---|---|
| | SFBETRM_TERM_CODE | = | &TERM | | AND |
| | SFBETRM_AR_IND | = | 'N' | | AND |
| | SFBETRM_TERM_CODE | = | SFRSTCR_TERM_CODE | | AND |
| | SFRSTCR_BILL_HR | > | 0 | | |

⊲ ◁ 1 of 1 ▷ ⊳  10 ⌄ Per Page     Record 1 of 4

**✕  ⓔ ellucian**   Population Selection Definition Rules GLRSLCT 9.3.18 (PROD-PEL)      📄 ADD   📄 RETRIEVE   ⛋ RELATED   ⚙ TOOLS   1

**Application:** AR   **Selection ID:** WITH_BALANCE   **Creator ID:** TMOORE      Start Over

▾ SELECTION DESCRIPTION                                                    ➕ Insert   ➖ Delete   ▣ Copy   ▾ Filter

| | | | |
|---|---|---|---|
| Description | Students with true balances | | Delete |
| | ☐ Manual | | ☐ Application Level Rules Exist |
| | ☐ Locked | | |

▾ DEFINITION                                                              ➕ Insert   ➖ Delete   ▣ Copy   ▾ Filter

| | |
|---|---|
| Select | TBALANC_PIDM |
| From | TBALANC |

▾ RULES                                                                   ➕ Insert   ➖ Delete   ▣ Copy   ▾ Filter

| '(' | Object or Data Element | Operator * | Value | ')' | AND / OR |
|---|---|---|---|---|---|
| | TBALANC_TERM_CODE | = | &TERM ... | | |

|◀ ◀ 1 of 1 ▶ ▶|   10 ∨   Per Page                                              Record 1 of 1

Once you feel that you have the proper students committed, you should run the registered not paid (purge) process in Audit mode. This is done by running the SFRRNOP process.

Parameter 01 - Enter the term.

Parameter 02 - Enter N to run in Audit mode only (this does not purge the students. It only creates a report of the students to be purged).

Parameter 03 - Enter N to choose only students who are not committed.

Parameter 04 – Leave blank.

Parameter 05 - Enter the address selection.

Parameter 06 - Enter the Address Hierarchy.

Parameter 07 - Enter Y to keep students with pre-authorized 3$_{rd}$ party contracts from being purged, or enter N depending on what you want

Parameter 08 - Enter the effective date of the drop.



Compare the ZSPTERM report results to the SFRRNOP report results. The students on both reports should match.

The ZFRCOMT process, the ZSPTERM process, and the SFRRNOP (in audit mode) may be run as often as necessary to obtain the desired students. Once the correct students are showing on the audit mode SFRRNOP, the process may be run in Update mode.

You may optionally elect to print the schedules of the students that will be

purged. If so, the student schedules **MUST be printed PRIOR to running SFRRNOP in Update Mode**.

The following population selection is created to identify students that are not "committed." Once the population selection is created, run GLBDATA on the population selection.

| | | | | | | |
|---|---|---|---|---|---|---|
| ✕  ⓞ ellucian   Population Selection Definition Rules GLRSLCT 9.3.18 (PROD-PEL) | | | | | | |

**Application: AR   Selection ID: STUDENTS_NOT_COMMITTED   Creator ID: TMOORE**

▼ SELECTION DESCRIPTION

| | | | |
|---|---|---|---|
| Description | Students not committed | ☐ Delete | |
| | ☐ Manual | ☐ Application Level Rules Exist | |
| | ☐ Locked | | |

▼ DEFINITION

| | |
|---|---|
| Select | SFRSTCR_PIDM |
| From | SFBETRM,SFRSTCR |

▼ RULES

| '(' | Object or Data Element | Operator * | Value | ')' | AND / OR |
|---|---|---|---|---|---|
| | SFBETRM_TERM_CODE | = | &TERM | | AND |
| | SFRSTCR_TERM_CODE | = | &TERM | | AND |
| | SFRSTCR_BILL_HR | > | 0 | | AND |
| | SFBETRM_AR_IND | = | 'N' | | |

◀ ◀ 1 of 1 ▶ ▶    10 ▾  Per Page

After GLBDATA is run identifying the students that have not been committed, SFRSCHD is run. See below for the parameters.

**Process: SFRSCHD  Student Schedule   Parameter Set: NOT_COMMITTED**

▼ PRINTER CONTROL

| | | | | | | |
|---|---|---|---|---|---|---|
| Printer | DATABASE | ... | Submit Time | | PDF Font Size | |
| Special Print | | | MIME Type | Plain Text ▾ | Delete After Days | 999 |
| Lines | 55 | | PDF Font | ... | Delete After Date | 10/26/2 |

▼ PARAMETER VALUES

| Number * | Parameters | Values |
|---|---|---|
| 01 | ID Number | |
| 02 | Process Term | 202112 |
| 03 | Start Range From Date | |
| 04 | Start Range To Date | |
| 05 | Schedule Type (% for all) | % |
| 06 | Instructional Method (%=all) | % |
| 07 | Address Selection Date | 01/31/2099 |
| 08 | Address Hierarchy | 1MA |
| 09 | Printer | |
| 10 | Campus Processing Indicator | N |
| 11 | Campus | |
| 12 | Selection Identifier | STUDENTS_NOT_COMMITTED |
| 13 | Application Code | AR |
| 14 | Creator ID | TMOORE |
| 15 | Run in sleep/wake mode (Y/N) | N |
| 16 | Sleep interval | 60 |
| 17 | Print Long Section Title | N |
| 18 | Print Schedule Type | N |
| 19 | Print Instructional Method | N |
| 20 | Print Reg Start/End Dates | N |
| 21 | Print Control Report | Y |

◀ ◀ 1 of 1 ▶ ▶    30 ▾  Per Page

You may print the student schedules to a printer or you may print them to

database and then save them as a word document.  Saving the schedules as a word document will allow the schedules to be emailed to appropriate staff.  It will also allow for the use of the search function in Word.

Once you have completed printing the student schedules (**optional)**, you can run SFRRNOP in the update mode.  THIS WILL PURGE THE STUDENTS FROM REGISTRATION AND REVERSE ALL RELATED TUITION AND FEES FROM TSAAREV AND OTHER REVENUE SCREENS.