



INFOSILEM TIMETABLER SIS TRANSFER™ 12.0

USER GUIDE

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INTRODUCTION

DOCUMENT SCOPE AND PURPOSES

- ⊕ This guide is designed to help the user responsible for uploading the data to the institution’s SIS, by outlining the steps to follow when using the transfer tool.

TARGET AUDIENCE

- ⊕ This transfer guide is intended for those that are responsible for preparing, validating and transferring data to and from external data sources.
- ⊕ The tool allows transferring data directly into Banner®.
- ⊕ The transfer process is divided into several segments:

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RUNNING TIMETABLER SIS TRANSFER

LOGGING IN

- ⊕ From within Infosilem Timetabler, click Tools > Banner® > **Create CRNs in Banner** or **Update matching CRNs in Banner**, depending on whether you are in CRN Creation or CRN Matching mode.

SETUP — OPTIONS

- ⊕ Select Setup to configure the upload procedures — this will open the Options screen. make sure that all the upload target fields are set to Oracle/SQL file format.

<i>Timetabler SIS Transfer Setup Options and Default Values</i>	Definition
CRN LEVEL	
Perform linking (Populate SSRLINK)	By default, this option is selected. When this option is selected, records will be exported to SSBSECT_LINK_IDENT. When unselected, no records will be exported to SSRLINK.
Restricting linking (SSRLINK) by campus code	If selected, the <i>Timetabler SIS Transfer</i> will only create link identifiers for <i>Infosilem Timetabler</i> components identified with the campus code "C".
If Section Override = 'Y', SSBSECT Part of Term Dates should : Always use delivery date range	By default, this option is selected. When this option is selected, the earliest delivery start date and latest delivery end date will be used.
If Section Override = 'Y', SSBSECT Part of Term Dates should : Use the Part of Term's dates, but extend if the deliveries go beyond	If selected, the Part of Term's date will be used, but they will be extended if the deliveries go past the Part of Term's dates.
SSBSECT_PRNT_IND : Set to 'Y' for all CRNs transferred from <i>Infosilem Timetabler</i>	By default, the SSBSECT_PRNT_IND (print field) set to "Y" is selected. By unselecting this option, the value will be left to null (or blank).
Set Faculty Grading Option SSBFSEC_WAIT_LIST_DISP_IND to "Y"	By default, this option is selected and will set the SSBFSEC_WAIT_LIST_DISP_IND to "Y". Unselecting this option will result in the value of null (or blank)
Set Faculty Grading Option SSBFSEC_MID_GRD_DISP_IND to "Y"	
Set Faculty Grading Option SSBFSEC_FIN_GRD_DISP_IND to "Y"	
MEET LEVEL	
Adjust delivery times	If selected, the transfer will adjust the delivery times to the value indicated within the "Adjustments" option. Meets created/updated within Banner® will appear with adjusted delivery times. If not selected, the Transfer will not adjust delivery times. Meets created/updated within Banner® will appear with unaltered delivery times.
Allow SPRIDEN disabled professors (SPRIDEN_CHANGE_IND specified)	
Upload Partition Preference (SSRMPRT)	Select this option to upload the Meet's Partition Preference. If this option is not selected, the SIS Transfer will not validate if the pavilions in Timetabler match those in the Banner® table(s). This option is unchecked by default
Upload Room Attribute Preferences (SSRMRDF)	Select this option to upload the Room Attribute Preferences. If this option is not selected, the SIS Transfer will not validate if the room attributes match those in the Banner® table(s). This option is unchecked by default
Delivery Frequency Splitting	

Timetabler SIS Transfer Setup Options and Default Values	Definition
Create one meet per delivery, for each room	Select this option to simply create one meet regardless if frequency's interval is greater than 1.
Create weekly meets when frequency interval is greater than 1	Select this option for the delivery frequency date range to be separated into several Banner® Meet records, each with a different Start Date - End Date range, one for each week that is not excluded by the <i>Infosilem Academic Suite</i> Frequency Interval setting.
Create a meet for each occurrence, for each room	Select this option to create one meet per day the delivery being scheduled.
Calculate hours per week (SSRMEET_HRS_WEEK) based on	
Timetabler delivery times (unadjusted), without using the duration factor	When this option is selected the following calculation will be used: (Number of scheduled delivery minutes*Number of scheduled days in a week) / 60
Banner® resulting meeting times and duration factor	When this option is selected the following calculation will be used: (Number of minutes of duration of adjusted delivery times*Number of days per week)/Banner® Duration Factor
Round down SSRMEET_HRS_WEEK when value has more than 2 decimals	If selected, the Transfer will round down SSRMEET_HRS_WEEK If not selected, the Transfer will round up SSRMEET_HRS_WEEK
For Duration Unit Code and Duration Number of Units, use	
Days	When this option is selected the duration will be calculated based upon the number days between the earliest frequency start date and last frequency end date of all deliveries associated to the component. Note that all days are considered including holidays and weekends. The duration code will be populated with the GTVDUNT_CODE that corresponds to the GTVDUNT_NUMBER_OF_DAYS value of "1".
Weeks	When this option is selected the duration will be calculated as the number of days between the first frequency start date and last frequency end date divided by 7. Note that the value will always be rounded up to the next highest integer if the calculation results in a fraction. The duration code will be populated with the GTVDUNT_CODE that corresponds to the GTVDUNT_NUMBER_OF_DAYS value of "7".
Default Values	
Leave Meet's Sched Status (SSRMEET_SCHS_CODE) as Null	By selecting this option, the SSRMEET_SCHS_CODE will be filled with a NULL value for all records. The option is checked by default.
Use Frequency Interval for meet type of all meets (SSRMEET_MTYP_CODE)	By default this option is NOT selected. When the option is not selected; the value entered in the Meet Type field of the delivery will be used to populate SSRMEET_MTYP_CODE. If it is selected, the meet type code will be set to the value entered into the delivery frequency field.

NOTE: When running the SIS Transfer Upload to Banner® while in CRN Creation mode, CRNs that are tied to a Part of Term will inherit the Part of term Census two freeze date.
CRNs that are Open Learning should have a value of NULL in the Census two freeze date.

SETUP — ORACLE HOME NAME SCREEN

- ⊕ Select ORACLE HOME to open the Oracle Home Name screen. Make sure that the specified Oracle Home Name of the Oracle client installed on your PC is correct and select OK.

SETUP — CONNECTIONS SCREEN

- ⊕ Selecting CONNECTIONS allows the user to view (read-only format) all connection parameters to the Banner® Schemas.

NOTE: For more information regarding the Banner® Schemas Connection Parameters, please refer to the «Connecting to the Database» section in the «SIS Transfer - Installation and Configuration Guide».

Delivery Frequency Splitting Examples

Create weekly meets when frequency interval is greater than 1

- ⊕ Just as the option's description implies, the splitting into one-week range meets will occur only for frequencies for which intervals are set to a value greater than 1.
- ⊕ If a frequency is set to a value of 1, meets will be created as in the first option “Create one meet per delivery frequency, for each room”

*Example: Suite Delivery Frequency Range:
Monday January 3, 2011 to Friday January 28, 2011
Interval: 2
Since the frequency interval is set to 2, this means the delivery occurs every 2nd week rather than every week. Though the date range Jan 3 to Jan 28 covers a span of 4 weeks, the delivery will be held in weeks 1 and 3 but not in weeks 2 and 4. As a result, if the setting “Create weekly meets” is used in the SIS Transfer, 2 Meet records will be created, one with the date range of Week 1 and the other with the date range of Week 3.*

Create a meet for each occurrence, for each room

- ⊕ The transfer will create one meet per day the delivery being scheduled when this is selected in the option screen.

*Example: The delivery's date range is 4 weeks long and the frequency's interval is 2, therefore weeks 1 and 3.
If the delivery is scheduled for Tuesdays and Thursdays, 4 meet records will result (Tuesday of Week 1, the Thursday of Week 1, Tuesday of Week 3 and Thursday of Week 3)*

Calculate hours per week (SSRMEET_HRS_WEEK) Examples: _____

Infosilem delivery times (unadjusted), without using duration factor

- ⊕ The SIS Transfer will use the following calculation for hours per week when this option is selected:

(Number of scheduled delivery minutes*Number of scheduled days in a week) / 60

Example: If a delivery is scheduled for 120 minutes per week the SSRMEET_HRS_WEEK value would be populated as 2 hours. (120/60)

Banner® resulting meeting times and term duration factor

- ⊕ When this option is selected, the SIS Transfer will use the following calculation for hours per week:

$$\frac{\text{(Number of minutes of duration of adjusted delivery times*Number of days per week)}}{\text{Banner® Duration Factor}}$$

- ⊕ Note that if no adjustments to the delivery times have been configured the calculation will be based on the number of scheduled delivery minutes.

NOTE: If no Duration Factor is defined the application will use the default value of 50

Example: If a delivery is scheduled for 120 minutes per week, meet times are decreased by 10 minutes and the Banner® Duration factor is 50 minutes the SRMEET_HRS_WEEK value would be populated as 2.2 hours.

Adjustments _____

- ⊕ Within the Adjustments screen the user can set the delivery time adjustment parameters to determine the amount of time by which the duration of a delivery is increased or decreased and if the modification affects the start time of the delivery or the end time of the delivery.

Modifications to the Start Times

Increasing the delivery duration at the delivery's start time

Increase Decrease start times by :

Decreasing the delivery duration at the delivery's start time

Increase Decrease start times by :

Modifications to the End Times

Increasing the delivery duration at the delivery's end time

Increase Decrease end times by :

Decreasing the delivery duration at the delivery's end time

Increase Decrease end times by :

Modifying the Delivery's Start Time

- (1) In order to modify the delivery start time simply select the «Add» button within the «Advanced Transfer Options» screen — this will open a confirmation box.
- (2) Select «Yes» to add a duration-specific-meet-time adjustment (the user can select «No» to abort the adding of a duration-specific meet time adjustment) — the Advanced Transfer Options screen will now contain two sets of durations (A Default duration and a user-defined duration).

NOTE: The Default duration affects all durations that are not defined within the «Advanced Transfer Options» screen.

- (3) Determine the delivery duration — this new modification affects in the Duration fields — hh:mm.
- (4) Determine if the modification is for the Deliveries' start or end times.
- (5) Determine if the modification is to increase the deliveries' duration or to decrease the deliveries' duration.
- (6) Determine the amount of time to apply to these deliveries — hh:mm
- (7) To add more user-defined delivery durations, simply select the «Add» button and repeat the process.
- (8) To add user-defined delivery durations — it will open the confirmation screen, select «Yes» to proceed.
- (9) To delete all user-defined durations and to return to the default delivery duration values.
- (10) To save the modifications and to exit the «Advanced Transfer Options» screen.

TRANSFER PROCESS

NOTE: Users in Banner® should not be creating or updating CRNs in the same Term(s), Part of Term(s) or Campus(es) as being transferred.

NOTE: The user can abort the transfer process at any time. To find out how to abort, please refer to the “ABORT PROCESS” section on page 12.

- (1) Select Transfer to start the transfer process. The Data Group Selection screen will appear.
- (2) Select Forward to launch the data verification process.
- (3) At this point, the process undergoes a pre-validation process. The pre-validation process ensures that the core data is valid. Once the first validation is done, the REPORT and VALIDATE buttons in the Data Transfer Toolbar become active.
- (4) Click on Report (to view the results of the first validation process).

NOTE: Any rejected records will not be processed. Only valid records will be processed and ultimately uploaded in the SIS.

REPORT OPTIONS

- ⊕ Clicking on Report will open the Report Options screen. Inside the Report Options screen, check the type of reports you want to produce (Results, Rejected Records and Log). Once the selection is complete, click OK to produce the desired report(s).

Results

- ⊕ Checking the Results box will produce a summary report of the number of valid and invalid records within the transferred source files.

Rejected Records

- ⊕ Checking on Rejected Records box will produce a detailed report of each rejected record within each transferred source file — the report will list the records’ ID, Name and Reason for the reject.

Log

- ⊕ Checking the Log box will produce a report that contains the events of the transfer process.

THE REPORT TOOLBAR

Description of the Toolbar Icons



⊕ Jumps to the first page of the report.



⊕ Jumps to the previous page of the report.



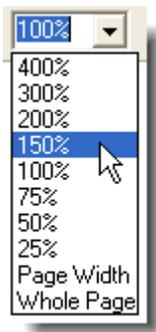
⊕ Jumps to the next page of the report.



⊕ Jumps to the last page of the report.



⊕ No functionality as of yet.



⊕ Used to magnify the view. Click on the drop-down arrow to open the selection menu.

PRINTING REPORTS

☒ To print a report, click on the Printer icon — the print dialog box will appear.

All

☒ Select All to print the entire report.

Pages

☒ Select Pages to print a portion of the report.

From

☒ Enter the first page that is to be printed (must be entered only if Pages has been selected).

To

☒ Enter the last page that is to be printed (must be entered only if Pages has been selected).

Copies

☒ Enter the number of copies to be printed. To modify the number, click in the Copies box and enter a new value manually or use the up or down arrows to the right of the Copies box.

Collate Copies

☒ Check the Collate box to have the pages printed in order.

OK

☒ Click OK to accept selections and to proceed with printing the report.

Cancel

☒ Click Cancel to cancel the selections and to cancel printing the report.

EXPORTING REPORTS

- ✦ To export a report, select the Export icon located in the report toolbar.
- ✦ A screen will pop up for you to choose the format of the file that the report will be exported to:
- ✦ You can choose to export to an HTML or text file. The format types available in the drop-down list depend on the software installed on the computer.
- ✦ The destination is the kind of platform where you wish to save the file. In this example, Disk file has been chosen.
- ✦ Select OK and a browser will pop up. This is where you must specify where you wish to save the report.
- ✦ Specify the path of where you wish the report to be saved and select OK. The report will be exported to the specified location.

VALIDATION PROCESS

- (1) Select Validate to launch a second validation process.
- (2) Once the Validate button is selected, the “Select elements to be transferred” screen opens. Select the Term Codes and/or part of term codes and/or Campus Codes to transfer. The validation progress bar will appear. The process will make sure that the data corresponds to the specifications in the SIS.
- (3) From the elements to be transferred screen, select the term codes, the part of term codes and the Campus codes to transfer.

Example: Displayed terms are terms associated to sections within the Infosilem Timetabler database.

If using the CRN creation model, CRNs associated to the selected terms will be deleted from the selected Banner® database. Components associated to the selected terms will be uploaded to the Banner® database. CRNs associated to terms that are not selected will not be deleted. Components associated to terms that are not selected will not be uploaded.

If using the CRN matching model, meets defined for CRNs associated to the selected terms will be deleted from the selected Banner® database. Deliveries defined for components associated to the selected terms will be uploaded to the Banner® database. Meets defined for CRNs associated to terms that are not selected will not be deleted. Deliveries defined for components associated to terms that are not selected will not be uploaded.

- ✦ Once the second validation is done, the REPORT button in the Data Transfer Toolbar become active
- ✦ Select Report (to view the results of the second validation process)

NOTE: Any rejected records will not be processed. Only valid records will be processed and ultimately uploaded in the SIS.

The Validation report will indicate if duplicate records exist in Banner. The transfer should be aborted, and duplicate records should be identified and adjusted before re-running the transfer

“Cancelled”-status-code components will block meets (deliveries) being exported into Banner but will not block CRNs (components).

ABORT PROCESS

- (1) Click on Abort to stop the process.
- (2) Click Yes to exit
- (3) Once all modifications are done, restart the transfer process as described in step 1

IMPORTING DATA

- (1) Once the validation is complete, click on Import to start the upload process. This process populates the Banner tables.
- (2) The import progress screen will appear
- (3) Once the import is done, the REPORT button in the Data Transfer Toolbar becomes active
- (4) Click on Report (to view the results of the import)
- (5) Once the import is complete, click on Done to close the toolbar and return to Timetabler.