

# Manually Keying Population Selections to be coded for Special Purpose or Activity Codes

The Advancement Services office can assign members or a population selection to a Special Purpose Type and Code or Activity code. When persons outside Advancement Services need to code a list of people to a special purpose or activity, they may create a population selection and key the list of persons to that selection. The example that follows illustrates the process for creating a “Special Purpose group: “Advancement Services, UNCG”.

## Step 1: Create a Population Selection – GLRSLCT

Using direct access go to “GLRSLCT – Population Selection Definition Rules Form” .

### Parameters

- Your username will default in as **Creator ID**
- add **application** “ALUMNI”,
- a **selection id** is any code you want to make up, (“DES” is used in this example). You may not have spaces in the selection code
- a description ( any code you want to make up, “Advancement Services, UNCG” is used in this example:

**Application:** ALUMNI      **Selection ID:** DES  
**Creator ID:** JDSMITH

**Selection Description**  
Advancement Services       Manual       Locked       Delete       Application Level


**Definition**  
Select: \_\_\_\_\_  
From: \_\_\_\_\_

**Rules**

'	Data Element	Operator	Value	'
▾	_____	▾	_____	▾
▾	_____	▾	_____	▾

Do not key anything in the “Definition” or “Rules” blocks because you are going to manually populate this population selection. Click the yellow diskette in the upper right-hand corner. Then you should see “transaction processed” in the lower left hand corner.

## Step 2: GLAEXTR – Population Selection Extract Data Form

Next direct access 'GLAEXTR', which is the form where you may key your population. The key at the top of this form should match the one you just created. From here you just click in an empty row, then click the icon:  to look up names to add to the selection or you can type in the name in the standard lookup format: *last,first,middle*. (You can include the wildcard:% for unknown parts of the name. If only one match is found the id will pop up, if not a selection box will pop up listing the matches.

<b>Application:</b>	<input type="text" value="ALUMNI"/>	<input type="button" value="v"/> BANNER Alumni/Development
<b>Selection ID:</b>	<input type="text" value="DES"/>	<input type="button" value="v"/> Advancement Services
<b>Creator ID:</b>	<input type="text" value="JDSMITH"/>	
<b>User ID:</b>	<input type="text" value="JDSMITH"/>	<input type="checkbox"/> Delete All

ID		Deceased
<input type="button" value="v"/>		
<input type="text" value="970001067"/>	<input type="text" value="Mr. James D. Smith"/>	<input type="checkbox"/>
<input type="text" value="970001017"/>	<input type="text" value="Ms. Lennie L. Alexander"/>	<input type="checkbox"/>
<input type="text" value="960142402"/>	<input type="text" value="Ms. Barbara J. Hall"/>	<input type="checkbox"/>
<input type="text" value="970000342"/>	<input type="text" value="Mrs. Pamela Cleveland Ulmer"/>	<input type="checkbox"/>
<input type="text" value="241767853"/>	<input type="text" value="Mrs. Judy S. Murray"/>	<input type="checkbox"/>
<input type="text" value="970080186"/>	<input type="text" value="Ms. Donna Wilson Sexton"/>	<input type="checkbox"/>

Once you have id's on all visible rows, hit the down arrow while on the bottom row to insert a new row or from the menu choose "RECORD" then "INSERT".

**Although you will be prompted to save the data when you exit this screen, all of your data will be lost if you do not successfully exit Banner! This means exit when you finish keying the ids, don't just leave Banner up and running because the changes are not committed to the database until you exit! If Banner is shutdown or the application crashes your data will be lost.**

### Step 3: Review the Names: GLIEXTR – Population Selection Inquiry Form

From this form you can sort the persons on the list by name or id and you can also run filters to search for certain names or ids. At this point you could also household via AZPHLD and then print the list out or do anything you might do with a generated population selection.

<b>Application:</b>	ALUMNI	▼ BANNER Alumni/Development
<b>Selection ID:</b>	DES	▼ Advancement Services
<b>Creator ID:</b>	JDSMITH	
<b>User ID:</b>	JDSMITH	<input checked="" type="radio"/> Sort by Name <input type="radio"/> Sort by ID

ID	Name	Decea
970001017	Alexander, Lennie L.	<input checked="" type="checkbox"/>
960142402	Hall, Barbara J.	<input type="checkbox"/>
241767853	Murray, Judy S.	<input type="checkbox"/>
070080186	Sexton, Donna W.	<input type="checkbox"/>

Once you've reviewed the list, you can contact Advancement Services and we'll get the group moved to an appropriate code.

(You can use this form (GLIEXTR) to review any population selection and you can search to see if persons are on the list using the F7 and F8 keys. F7 = enter query mode and F8=execute the query. To search by name use the format displayed, for example: Smith, James D. or **Smith%** or **%James%**