



Common Banner Merge Errors

Student Information Systems have many rules and requirements with regards to creating and updating objects. As such, when Coursedog scheduling updates (section data primarily) are merged with the SIS through our integrations certain requirements must be met in order for data to be accepted, otherwise, a merge error may occur.

*The Coursedog team is committed to documenting all known SIS requirements and sharing those with our partners to ensure best practice set-up of system **rules, merge settings, section template settings, etc.** in our platform to avoid as many merge issues as possible automatically. You will continue to find up to date information, specific to each [SIS, in our Help Center](#) as we build and grow our knowledge base around this.*

However, some common merge issues may not currently benefit from a configuration prevention. Please find these documented below for your reference. [Monitoring your merge error reports](#) regularly (after nightly syncs or once a week during active scheduling) is recommended to catch and resolve these issues. If you are not utilizing real-time or nightly syncs give your team at least 1 week between the end of scheduling and when POSTs should be finalized to resolve any merge errors.

Merge Issue: Primary Instructor Missing

Name of Error in Merge Report

- No merge error displayed

Explanation

Banner requires a "primary" instructor be assigned to each section, but will not prevent us from setting a single, non-primary instructor for a section via the API

How to Resolve

Go into the section and the "Instructor" assignment card. Click on "Set Instructor Roles and Details". Click on Instructor name and select "Primary" for Role and Save.

Recommendation and Long-term fix

Rules can be set up to enforce the selection of "Primary" in the section editor before submission.

As of 3/19 a product enhancement will be released that will help to default Instructor assignments to primary.

Merge Issue: Schedule Code / Section Code / Section Type

Name of Error in Merge Report:

- "Invalid code for course for meeting section schedule type"
- "Invalid Schedule Code for course in section"



- “Cannot change Schedule Type when meeting times exist for section”

Explanation

In Banner the section type is referred to as schedule type or code. In the section editor for this field the scheduler is presented with every possible schedule type option that Banner supports and they often choose the wrong value. If they choose incorrectly a merge error will occur.

How to Resolve

For sections impacted the section type will need to be fixed. Unfortunately, Banner requires an order of operations around the assignment of type, meeting time, and instructors so the below steps will need to be followed:

1. Take note of the meeting times and instructor details for the section. You will need these details at a later step.
2. **Edit the section and remove all meetings and instructors**
3. Save, and allow the sync to complete with the SIS. This may require waiting up to a minute if using realtime integration, or overnight if not.
4. **Edit the section again and change the Section Type**
5. Save, and allow the sync to complete with the SIS. This may require waiting up to a minute if using realtime integration, or overnight if not.
6. **Add all meetings and professors back**
7. Save, and allow the sync to complete with the SIS. This may require waiting up to a minute if using realtime integration, or overnight if not.

If you have questions or a very large number of impacted sections contact your Courserdog customer success representative for assistance.

Recommendation and Long-term fix

To prevent these errors an extended description note can be added to the section editor by the schedule type field with directions of how to select the right value. In some cases, Custom Rules may be set up as well. Finally training your department schedulers to be aware of conscious selection is recommended.

At the end of April '21 a product enhancement will be released to display only correct/relevant schedule codes as set at the Course level and thus eliminate the possibility of an invalid selection being made.

Merge Issue: Grade Mode

Name of Error in Merge Report

- “Invalid Grading Mode for course in section”

Explanation

The scheduler is presented with every possible grade mode that Banner supports and they often choose the wrong value causing a merge error.

How to Resolve

Unlike with the section type field (above), incorrect grade mode selections can be corrected by editing the value in the section editor for impacted sections at any time, without the need to remove meetings or instructors to do so. To resolve this error, simply edit the section again, this time selecting a valid grade mode for the course. If you are unsure of which grade modes may be valid for a course, you may check other sections within the course, a previous semester, or the course in Banner directly.



Recommendations and Long-term fix

Consider adding guidelines using the extended description for the field in the section editor to help users select proper value or set up Rules to enforce proper selection. Finally, train end users on how to select the right values.

At the end of April '21 a product enhancement will be released to display only correct/relevant grade mode codes as set at the Course level and thus eliminate the possibility of an invalid selection being made.

Merge Issue: Contact/Credit/Billing Hours MisMatch

Name of Error in Merge Report:

- "Section billing hours must equal course billing hours"
- "Section contact hours must equal course contact hours"
- "Section credit hours/CEUs must equal course credit hours/CEUs"
- "Section lecture hours must equal course lecture hours"
- "Sum of session credit hours exceeds the maximum credit hours allowed for the course"

Explanation

If credit or hours are changed at the course level in Banner the related sections in Coursedog will need to be updated to match or a merge error will be generated.

How to Resolve

Incorrect credit and hour selections can be corrected by editing the value in the section editor for impacted sections at any time, without the need to remove meetings or instructors to do so. To resolve this error, simply edit the section again, this time selecting a valid number of hours / credits for the course. If you are unsure of the valid options for a course, you may check other sections within the course, a previous semester, or the course in Banner directly. Also ensure that the default "Credit Conflict" rule is enabled within Coursedog for your institution, and that it is marked as required.

Recommendations and Long-term fix

Coursedog is deploying an update to the section template which will prevent scheduler from selecting invalid credit values during section creation. In the event that credit hours must be changed for a course, it is recommended that users simultaneously update the affected sections within Coursedog.

Merge Issue: Part of Term

Name of Error in Merge Report:

- "Cannot change Part-of-Term fields when enrollments or meeting times exist"
- "Term Control prohibits update of Part-of-Term information, Census Dates, and Schedule Type for section"
- "Term Control requires default Part-of-Term information and Census Dates for creating section"

Explanation

Unfortunately, Banner requires that all meetings, and therefore also all instructors, be removed from a section in order to change the Part of Term value.



How to Resolve

If there are meetings or instructors already in the section schedulers must execute the following steps to change the part of term:

1. Take note of the meeting times and instructor details for the section. You will need these details at a later step.
2. **Edit the section and remove all meetings and instructors**
3. Save, and allow the sync to complete with the SIS. This may require waiting up to a minute if using realtime integration, or overnight if not.
4. **Edit the section again and change the Part of Term**
5. Save, and allow the sync to complete with the SIS. This may require waiting up to a minute if using realtime integration, or overnight if not.
6. **Add all meetings and professors back**
7. Save, and allow the sync to complete with the SIS. This may require waiting up to a minute if using realtime integration, or overnight if not.

If you have questions or a very large number of impacted sections contact your Coursedog customer success representative for assistance.

Recommendation and Long-term fix

1. **Training:** Train schedulers to set the part of term before adding meetings and instructors. Also, ensure they are trained in the steps required to change the part of term when there are meetings or instructors assigned.
2. **Rules:** Ensure the default "Changing Part of Term" rule is enabled within Coursedog for your institution, and that it is marked as required.
3. **Guidelines:** Identify if there are guidelines that can be provided to schedulers to prevent errors in the section template.

Coursedog is reviewing Order of Operations product enhancements for our roadmap.

Merge Issue: Enrollments

Name of Error in Merge Report: "Cannot change Part-of-Term fields when enrollments or meeting times exist, or when section is Open Learning"

Explanation

Banner does not permit certain section fields to be modified when active enrollments exist. If schedulers are permitted to make edits to sections that violate Banner's rules then the integration will generate an error.

How to Resolve

Enable custom rules in your Coursedog application to prevent schedulers from making these mistakes and thus prevent the merge errors. Ask your Coursedog representative for guidance if needed. In many cases your Coursedog rep may have set these up already for you during onboarding.

Recommendation and Long-term fix

1. **Training:** Train schedulers to perform all section edits before enrollment opens.
2. **Rules:** Ensure the following rules are enabled within Coursedog for your institution:
 - a. Prevent change of section type when enrollments greater than 0
 - b. Prevent change of part of term when enrollments greater than 0



- c. Prevent change of room when enrollments greater than 0
 - d. Prevent change of status when enrollments greater than 0
3. **Guidelines:** You may wish to configure Future Actions and Phases to ensure that schedulers are no longer able to edit these section fields after the date on which enrollment begins.

Merge Issue: Section Cancellations

Name of Error in Merge Report: "Meeting times exits, cannot inactivate section"
Explanation

Banner requires that all meetings and instructors be removed from a section when changing the status to Cancelled. Marking a section as Cancelled without removing the meeting and instructor assignments will result in a merge error.

How to Resolve

Remove all meetings and instructors before setting the section status to cancelled.

Recommendation and Long-term fix

1. **Training:** train schedulers to remove meetings and instructors prior to cancelling a section.
2. **Rules:** Set up a rule that requires meetings and professors to be removed when setting status to 'Cancelled'.
3. **Guidelines:** Ensure there are notes in the section template to help guide schedulers, e.g. "To 'Cancel/Inactivate' a section, please submit a Request and ensure all meeting patterns and instructors have been removed."

Coursedog is reviewing Order of Operations product enhancements for our roadmap.

Merge Issue: "Double Bookings" across Terms

Name of Error in Merge Report:

- "Meeting times conflict within section"
- "Room conflict"
- "Room schedule conflict within the section"

Explanation

Banner throws an error when a room or instructor is double booked. Some Banner clients have overlapping or concurrent terms which can result in Coursedog attempting to double book a room or instructor.

How to Resolve

Clients whose terms overlap, i.e. those that have extension terms whose start and end dates overlap with other terms must be aware that Coursedog will not detect or prevent double bookings of instructors or rooms for these overlapping terms. Such clients will need to rely on errors returned to Coursedog by the integration to rectify and correct the double bookings.

Recommendation and Long-term fix

Enhancements to Coursedog are planned for June 2021 to enable double booking detection across terms.



Merge Issue: Relationships

Name of Error in Merge Report

- No merge error displayed

Explanation

Coursedog currently supports cross-list relationships in Banner (SSAXLST). We do not currently support linked sections (SSAETL).

How to Resolve

Additional relationship types (such as those created via SSAETL) must be created and maintained directly in Banner.

Recommendation and Long-term fix

Additional relationship support is under research and review by our product team. It is not yet planned on the roadmap.

Merge Issue: Edits to Meetings and Instructors - Order of Operations Errors

Name of Error in Merge Report:

- "Faculty assignment session has no meeting times defined for section"
- "Invalid Delete; Instructor will exist with no meeting times"
- "Missing mandatory CRN for faculty assignment"

Explanation

The Coursedog Banner integration currently does not handle all section editing scenarios in the order in which Banner requires. For example, removing meeting times and instructors at the same time, changing between standard and custom meeting patterns, adding a second instructor without selecting a primary, changing instructors, removing and re-adding meetings, changing meeting times and instructors, and other compound section edit operations may result in merge errors.

How to Resolve

Ensure department schedulers are trained on the correct order of operations required by Banner if they intend to make any changes to instructors or meeting times after an initial submission.

Recommendation and Long-term fix

Schedulers must ensure that instructors are not added to Sections without also setting a Meeting. Also ensure that the default "Instructors without Meetings" rule is enabled within Coursedog for your institution, and that it is marked as required.

As of mid March '21 there are identified fixes and improvements scheduled for release by end of April '21 that should resolve most of the above scenarios. The above should only truly impact anyone actively scheduling prior to the end of April '21.

Merge Issue: Begin Time and End Time Issue

Name of Error in Merge Report:

- "Begin time and end time must be four digits and within range 0000 to 2359"



- "Begin time must be less than end time"

Explanation

Banner will reject meeting patterns/times that are incorrect based on logic. Schedulers need to ensure that Meeting "End Times" are always greater than Meeting "Start Times."

How to Resolve

This is most likely a user error in entering the meeting time. Please review the section and adjust accordingly before resubmitting. Coursedog will prevent users from entering invalid times by default.

FAQs:

- What does it mean when merges return a **"No Coursedog or SIS data found"** error? Any action required?
A: This message indicates one of the following:
 - There is no data in the SIS to retrieve for the given term
 - Check this first - If this is the case then ignore or resolve in SIS. If not, (i.e. data is expected) this should be escalated to Coursedog support as it is one of the following:
 - There was a connection error and the merge failed to retrieve data from the SIS
 - There was a failure in transformation or processing in the partner (i.e. N2N) integration layer that led to the merge not receiving any data from the SIS.

More information and details about recommendations regarding best practice set up for Banner schools regarding the Admin Console, Section Template and more can be found via links below:

[More section related best practices for Banner schools](#)

[More Meetings related best practices for Banner schools](#)

***Please feel free to ask your Coursedog Customer Success team
if you have any questions!***