

How to search for available Aid Fund codes

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How to search for available Aid Fund codes



Form used KZIFDQY Aid Fund Code Availability Inquiry

- Related forms**
- KVIAPHI Aid Property Hierarchy Inquiry Form
 - KVVFSRC Aid Fund Source Code Validation Table

Overview Use the Aid Fund Code Availability Inquiry form KZIFDQY to search the Banner Student Aid database for aid funds based on user-defined criteria. Users are able to query all existing aid funds to find those that meet their specified needs for a particular awarding situation based on a variety of characteristics including available fund balance, aid fund source, aid fund text and whether or not an aid fund requires donor acknowledgement by either staff or student etc.

The screenshot shows the Oracle Developer Forms Runtime interface for the 'KZIFDQY' form. The window title is 'Oracle Developer Forms Runtime - Web: Open - KZIFDQY'. The menu bar includes 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. The toolbar contains various navigation and editing icons. The main content area is divided into several sections:

- Aid Year:** A dropdown menu.
- Search Criteria:** A section with several input fields:
 - Fund Source Code: dropdown
 - Available to Offer Amount: Minimum and Maximum input fields
 - Disbursable: checkbox
 - Spending Cap Amount: input field
 - Award Basis: checkbox
 - Aid Fund Spent Amount: input field
 - Renewable: checkbox
 - Aid Fund Balance Amount: input field
- Enable Regular Expressions:** checkbox
- Source Table:** dropdown
- Code Lookup:** dropdown
- Search Expression:** text input field
- Search Results:** A table with the following columns:

Aid Fund Source Code	Aid Fund Code	Aid Fund Short Description	Available to Offer Amount	Spending Cap Amount	Finance Total Allocated Amount	Aid Fund Spent Amount	Aid Fund Balance Amount
- Footer:** 'Enter the aid year code.' and 'Record: 1/1 | ... | List of Valu... | <OSC>'



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- Procedure**
- 1 Open form KZIFDQY
 - 2 Enter the **Aid Year** for which you want to search for Aid Funds or use the drop down arrow to select the Aid Year from a list.
 - 3 Click **Next Block** 
 - 4 Define your search criteria. For hints about searching, see [“Guidelines and hints for defining your search criteria” on page 7](#). All fields are optional with the exception of the **“Enable Regular Expressions”** field which is a required field. The more criteria you enter, the more focused your search will be. Enter data in the following fields in any combination to refine the search criteria:

Field name	Description
Fund Source Code	The Fund Source Code indicates the origin of the award (e.g. Institutional Award, Government Aid etc.). Enter the Fund Source Code (e.g. IAAWRD, ORAWRD etc.) to select aid funds that apply only to the specified fund source or use the drop down arrow to select the Fund Source Code from a list. Leave this field blank to include aid funds associated to all Fund Source Codes in your query.
Disbursable	Enter Y to search for disbursable aid funds, N to search for non-disbursable* aid funds, or leave this field blank to include both disbursable and non-disbursable funds in your query. *Non-disbursable aid funds are typically aid funds that are non-monetary such as designations, medals, book prizes etc. However, there are also some generic aid funds that are non-disbursable.
Award Basis	Award Basis refers to whether an award is made on the basis of need (e.g. bursary) or merit (e.g. scholarship). <ul style="list-style-type: none"> • Enter 1 to include only aid funds that are awarded on the basis of Merit • Enter 2 to include only aid funds that are awarded on the basis of Need Note: hybrid funds combination of need and merit are not used at McGill (value=3) Leave this field blank to include all funds regardless of award basis in your search.

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Field name	Description
Renewable	Enter Y to include only aid funds that are renewable, N to include only aid funds that are non-renewable or leave this field blank to include both renewable and non-renewable aid funds in your search.
Minimum and/or Maximum <ul style="list-style-type: none"> <li data-bbox="154 473 425 524">• Available to Offer Amount <li data-bbox="154 597 372 647">• Spending Cap Amount <li data-bbox="154 675 379 701">• Spent Amount <li data-bbox="154 730 404 756">• Balance amount 	<p>Enter minimum and/or maximum amounts for the following fields to select aid funds based on specified values (or range of values) as related to those fields.</p> <p>The amount of money available for generating offers. Note: This may be greater than the actual balance amount in the fund if the available to offer factor has been set to greater than one. F</p> <p>The maximum amount that can be spent from this aid fund.</p> <p>The amount of money that has been spent from this aid fund.</p> <p>The amount of funds currently available for spending.</p>
Enable Regular Expressions	<p>Required field. Enter a value of Y or N.</p> <p>Enable Regular Expressions is an option which allows the user enhanced flexibility facilitating the entry of more refined search criteria. See “Guidelines and hints for defining your search criteria” on page 7 in this document for more detail on using Regular Expressions to define search criteria.</p> <p>If you enter a Y to enable regular expressions to be used for expression pattern matching note that:</p> <ul style="list-style-type: none"> <li data-bbox="458 1072 953 1098">• Search expressions are case sensitive. <li data-bbox="458 1112 1196 1138">• All regular expressions recognized by ORACLE are allowed. <li data-bbox="458 1152 1279 1178">• This feature can only be used in versions of Oracle 10G or higher. <p>Enter an N if you do not want to enable regular search expressions. Note that:</p> <ul style="list-style-type: none"> <li data-bbox="458 1312 1001 1338">• Search expressions are not case sensitive. <li data-bbox="458 1352 1322 1494">• Standard ORACLE wildcard symbols of % and _ apply (e.g. preface and suffix of % will include results where any character(s) before or after the specified character(s) will be included in matching the criteria. For example, specifying %urs% in your search expression would return results which could include <i>Bursary</i>, <i>Purse</i>, etc.

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- 5 Click **Next Block**  to move to the next section of the form.
- 6 Enter data in the following fields as required to further refine your query.
If there is already data appearing in any of these fields that was defaulted in from a previous query, you should delete it first by placing your cursor in the **Source Table** field, on the line you wish to delete and clicking **Record > Remove** (do **not** click **Clear**). Click from the menu at the top of the form or use the **Shift + F6** keys.

Field name	Description
Source Table	Enter or click <input type="checkbox"/> to select from a list, the Banner table to be used to refine your search criteria. Current selections available are: <ul style="list-style-type: none"> • KVRAPHI Aid Fund Property Codes • KVVFTXT Aid Fund Text Codes
Code Lookup	Enter a code that exists in the table specified in Source Table or click <input type="checkbox"/> to select a code from a list.
Search Expression	Enter the code* or data string that you want to search for. Wildcard characters can be used. If Regular Expressions is not enabled you can enter %Bur% to find Bursary (and any data string that includes 'bur') etc. *Note: If you need to find an Aid Property Code Value to search on, you can refer to form KVIAPHI Aid Property Hierarchy Inquiry Form to help you make your selection or refer to the document Aid Fund Property codes .

- 7 Click **Next Block**  to view the results of the query in the bottom section of the form. The following data, as it exists in the database for the specified aid year, can be viewed:

Field name	Description
Aid Fund Source Code	Indicates the origin of the award (e.g. IAAWRD represents Institutional Awards, GAAWRD represents Government Aid etc.). See table KVVFSRC Aid Fund Source Code Validation table to see full list of valid codes.
Aid Fund Code	Code representing the Aid Fund.
Aid Fund Short Description	Short description for the Aid Fund.

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Field name	Description
Available to Offer Amount	Amount of money that is available for making offers for this aid fund. This may or may not represent the amount of funds that can be spent from this aid fund. In some cases an amount that exceeds the actual available budget for a fund is available to offer to students. This is done in some cases to account for students who decline their offers.
Spending Cap Amount	This amount represents the actual available budget for this aid fund.
Finance Total Allocated Amount	This is a calculated field which is the sum of prior year, transfer and budget amounts for the FOAPAL.
Chart of Accounts Code	Finance chart of accounts code where the fund amount is recorded
Fiscal Year	Fiscal year that is being referenced with regards to account information. Note: fiscal year and aid year do not start and end at the same time which may need to be considered when awarding aid during the months of July and August.
Fund Code	Fund against which the fund amount will be recorded.
Organization Code	Organization against which the fund amount will be recorded.
Account Code	Account against which the fund amount will be recorded.
Program Code	Program against which the fund amount will be recorded.
Activity Code	Activity against which the fund amount will be recorded.
Location Code	Location against which the fund amount will be recorded.
Aid Fund Spent Amount	This is a calculated (derived) field representing the amount that has been spent from this aid fund. For institutional aid this amount is the sum of the total outstanding offers + total accepted awards for the aid fund. Balances are adjusted accordingly in BSAC dynamically.
Aid Fund Balance Amount	The amount that is available to be spent for the aid fund. It takes into account what has already been spent or offered.



Guidelines and hints for defining your search criteria

Search Expression: expressions "AND"ed together

This means that all **Search Expressions** defined must be matched to the characteristics of an aid fund in order for it to be selected.

Example

By entering the following search criteria you are asking the system to return all aid funds that have an **AIDTYPE** of **BURS** (Bursary) **and** **SCHL** (Scholarship) **and** have the word (or word containing this character string) 'Ontario' in the **Calendar** description of the aid fund.

Source Table	Code Lookup	Search Expression
<input type="text" value="KVRAPHI"/>	<input type="text" value="AIDTYPE"/>	BURS
<input type="text" value="KVRAPHI"/>	<input type="text" value="AIDTYPE"/>	SCHL
<input type="text" value="KVVFTXT"/>	<input type="text" value="CALENDAR"/>	%Ontario

Because it is not possible to have these two values (SCHL and BURS) defined as **AIDTYPES** for the same aid fund, this query would yield no results.

Search Expression: case sensitivity

- When **Enable Regular Expression** is set to **Y**, search expressions **are** case sensitive.
- When **Enable Regular Expression** is set to **N**, search expressions are **not** case sensitive.

Source Table KVRAPHI hierarchy rules

The **Source Table KVRAPHI** holds the **Aid Property Hierarchy** data. (This data can be viewed in INB via the KVIAPHI form Aid Property Hierarchy Inquiry or see the document [Aid Fund Property codes](#)).

When searching over **KVRAPHI** codes/values, a descending hierarchy is included. (This works regardless of **Enable Regular Expression** value).



Example

Suppose an **Aid Property** (Source Table) code of **AIDTYPE** has been created and the following hierarchy of possible values has been created for that code:

NULLPROP (This is the top most level of the hierarchy)

|

MON (Monetary)

|

|---- **BURS** (Bursary)

|---- **LOAN** (Loan)

|---- **SCHL** (Scholarship)

|---- **FELW** (Fellowship)

If searching for all monetary awards, the following search expression would yield the results desired: **MON**

Since a **BURS** (Bursary) value is under the **MON** (Monetary) hierarchy/tree of values, an aid fund assigned to **BURS** would be matched successfully.

Defining your search criteria **not using 'Enable Regular Expressions'**

Set **Enable Regular Expressions** to **N**.

- Search expressions are not case sensitive.
- Oracle **%** and **_** wildcard symbols apply.
- Search expressions are prefixed and suffixed with a **%** wildcard when queried. For example, a search expression of **BURS** would be queried as **%BURS%**, (i.e. anything before and after expression to match is valid). Specifying **%URS%** would return results that could include **Bursary, Purse, ursine, ours** etc.
- To find out if there is an aid property value that exists (any aid property) for a particular set of aid funds you can enter just the wildcard character **%**. This would allow you to find all aid funds that have a property code of **AIDTYPE** regardless of the value.

Guidelines and hints for defining your search criteria



Defining 'OR' conditions using the 'Enable Regular Expressions' function

Using the **Enable Regular Expressions** for searching allows you to use **OR** conditions in addition to the **AND** conditions described above. Search expressions are case sensitive and all regular expressions recognized by ORACLE are allowed.

- Procedure**
- 1 Set **Enable Regular Expressions** to **Y**.
 - 2 Create the **OR** condition by using a pipe syntax. For example: if you want to search for bursary OR fellowship aid funds, the **Search Expression** would be entered as follows: **(BURS|FELW)**. This query would return aid funds that are either a Bursary **OR** Fellowship. (See example below).

The screenshot shows the Oracle Developer Forms Runtime interface for the 'Aid Fund Code Availability Inquiry' form. The 'Search Criteria' section includes fields for 'Fund Source Code', 'Disbursable', 'Award Basis', 'Renewable', 'Available to Offer Amount', 'Spending Cap Amount', 'Aid Fund Spent Amount', and 'Aid Fund Balance Amount'. The 'Enable Regular Expressions' checkbox is checked. The 'Search Expression' field contains '(BURS|FELW)', which is circled in red. The 'Search Results' section displays a table of aid fund codes and descriptions.

Aid Fund Source Code	Aid Fund Code	Aid Fund Short Description	Available to Offer Amount	Spending Cap Amount	Finance Total Allocated Amount	Aid Fund Spent Amount	Aid Fund Balance Amount
IAAWRD	B226138C00	Gustav Levinich Scholarship [UNIV:BURS:I			2,605.29	2,000.00	605.29
IAAWRD	B226019C00	H E Herschorn Bursary [UNIV:BURS:I			1,044.09	1,025.00	19.09
IAAWRD	B20234E00	H Laurie Seybold Bursary [UNIV:BURS:I			10,175.31	0.00	4,175.31
IAAWRD	B20234C00	H Laurie Seybold Bursary [UNIV:BURS:I			10,175.31	6,000.00	4,175.31
IAAWRD	F226479C00	H W Wilson Foundation Fellowsh [FACU:FELW			12,895.47	4,000.00	8,895.47
IAAWRD	B225992E00	Harold G Fox Education Bursary [UNIV:BURS:I			3,228.11	0.00	228.11
IAAWRD	B225992C00	Harold G Fox Education Bursary [UNIV:BURS:I			3,228.11	3,000.00	228.11
IAAWRD	F201031C00	Harry Shankman Scholarships [FACU:FELW			13,268.71	0.00	6,268.71



Enable Regular Expression can only be used in versions 10g and higher of ORACLE.

Understanding the 'Aid Fund Balance Amount' field

Disbursable aid funds

The aid fund balance for disbursable aid funds is derived from the relationship of the balance of the FOAPAL to which the aid fund is attached and the aid fund's spending cap.

The **Aid Fund Balance Amount**, as it applies to disbursable aid funds, is determined by the system as follows:

The LESSER_OF:

- (LESSER_OF (Aid Fund Spending Cap Amount, Finance Total Allocated Amount)) **Minus** the Aid Fund Spent Amount

OR

- Finance Total Allocated Amount **Minus** the Amount spent by FOAPAL

Non disbursable aid funds

For non-disbursable aid funds, the **Aid Fund Balance Amount** is determined as follows:

- **Aid Fund Spending Cap Amount** minus **Aid Fund Spent Amount** (if no **Aid Fund Spending Cap** was defined for the aid fund, the balance is set to null).