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Banner Student Retention Performance Handbook

Release 1.1 February 2013



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Banner Student Retention Performance 1.1 Handbook

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1 Overview

The Banner Student Retention Performance product is a tightly integrated package of scorecards, dashboards, reports, and analytic capabilities coupled with a data warehouse. It provides you better insights into the performance of your student enrollment and retention activities. It enables you to manage students by focusing on the students' retention, performance, progression and engagement activities from matriculation through completion or graduation while driving institution performance toward institutional retention goals.

The Banner Student Retention Performance solution includes a data warehouse component, Administrative User Interface and IBM Cognos components that offer you the following:

- The data warehouse component includes a set of multi-dimensional data models (star schema) as well as an aggregate star as the key to each of the business concepts
- The Administrative User Interface (UI) enables you to define parameters, execute jobs, and define meta data
- The Cognos Content includes business concepts (Framework Manager Model and packages), cubes (Transformer Model and package), operational reports (Report, Query, and Analysis Studio), performance charts and dashboards. The solution also includes a sample scorecard illustrating content (Metric Studio and Metric Designer) and capabilities as a Cognos component

You can measure campaign progress, understand trends, predict behaviors and outcomes based on the Key Performance Indicators (KPIs) available in the scorecards and dashboards, which reflect critical institutional processes. You can also drill-through to various reports and performance charts to get detailed information needed to improve performance.

You can use Banner Student Retention Performance to:

- Monitor student retention and student success
- Satisfy institution goals and objectives
- Extend and modify performance monitoring capabilities

• Create operational reports and ad hoc queries that meet the specific needs of your institution

Overview

All the data gathered in this product is integrated for dynamic exploration of trends and exceptions using cubes, dashboards, reports, and ad hoc reporting and analysis tools. The data warehouse and the IBM Cognos BI tools enable you to report, analyze, monitor and track performance, and define goals and objectives and measure progress against key performance indicators.

Banner Enterprise Data Warehouse

Banner Student Retention Performance contains data specific to this solution and data shared with the Banner Enterprise Data Warehouse (Banner EDW). Banner EDW is a multi-dimensional database that gives you a complete picture of your institution's current and past business conditions. The Banner EDW offers comprehensive reporting and analysis capabilities by providing the following data objects:

- Operational stars that you can refresh with current data on a regular basis
- Snapshot stars that offer a historical snapshot of the data at a point-in-time
- Aggregate stars that you can refresh with current data on a regular basis that combine operational star data for a specific business purpose.

This combination of current and historical data allows you to do comparative reporting and analysis on student retention, performance, progress and completion (graduation).

Administrative User Interface component

Banner Student Retention Performance as well as the other Performance products, the Banner Operational Data Store, and the Banner EDW use the Administrative User Interface, which allows you to:

- Establish cleansing rules
- Define load extract parameters
- Define parameter map values
- Schedule and run load and refresh data processes
- Define and publish institution meta data

Cognos components

The Cognos components of a performance product includes the following types of objects built using the IBM Cognos Business Intelligence application:

- Business concepts (Framework Manager Model/package) group data captured using the Banner Student or the Banner Relationship Management products to satisfy a set of reporting needs by providing the ability to combine data to answer specific business questions
- Cubes (Transformer Model/package) combination of Framework Manager Model data loaded into a cube to expedite analysis of high level data and answer business questions and data needs
- Reports display trends of outcomes, summaries of current outcomes, and detailed information about students
- Dashboards display several graphical performance charts for a specific business area on a single screen that you can review at a glance
- Scorecards display institutional goals and objectives including Key Performance Indicators (KPIs) that monitor progress toward your goals and objectives and a set of strategic initiatives that are needed to produce desired outcomes

The data for these objects is stored in the Banner EDW. These objects are intended to illustrate the kind of analysis you can perform on the warehouse data. You can use the reports, dashboards, and scorecards as delivered or you can modify them to reflect the specific information you need to analyze and monitor your institution's progress.

Cognos reporting applications

You can use the following Cognos applications to customize the delivered Cognos objects and to build and maintain new reports, dashboards, and scorecards.

Cognos Application	Description
Cognos Connection	Use this portal dashboard to access the various components in this application
Query Studio	Use to create simple, ad hoc queries and reports. Launch the Query Studio and select the data package to be used for reporting.
Report Studio	Use to create simple and complex reports to answer business questions. Launch Report Studio and select the data package and the format of your report. Report Studio opens with the selected report format showing you where to insert the data.

Overview

Cognos Application	Description
Metric Studio	Use to create metrics. Metric Studio manages business performance in key areas by monitoring, analyzing, and reporting them at all levels of the organization.
Analysis Studio	Use to explore, analyze, and compare dimensional data to help answer your business questions. Analysis Studio is designed to help you report, monitor, and analyze your institution's performance.

Document organization

This document includes the chapters outlined in the following table.

Chapter	Description
Overview	Gives a high level overview of the Banner Student Retention Performance product and its relationship with the Banner Enterprise Data Warehouse.
Cognos Reporting Tools	Describes some of the Cognos components used with the Banner Student Retention Performance product. Use this chapter in conjunction with the related Cognos documentation.
Business Concepts	Describes the business concepts used with the Banner Student Retention Performance product. Business concepts are used to organize the data available for different reporting needs.
Reports	Describes the types of reports you can create in Cognos and details the illustrative reports delivered with the product.
Cubes	Describes Cognos cubes and details the cubes delivered with the product.
Dashboards and Performance Charts	Describes the illustrative dashboards and performance charts delivered with the product.
Scorecard	Describes Cognos scorecards and details the scorecard delivered with the product.

Chapter	Description
Architecture	Describes the components of the warehouse architecture, which is part of the Banner Enterprise Data Warehouse.

Related documentation

Refer to the following guides for information related to Banner Student Retention Performance.

Banner Enterprise Data Warehouse Administration Guide

The *Banner Enterprise Data Warehouse Administration Guide* includes information about the warehouse architecture, the Administrative User Interface that you can use to set up and maintain the warehouse, and Cognos features.

• Banner Enterprise Data Warehouse User Guide

The Banner Student Retention Performance User Guide includes information about how to set up EDW Extract Parameters and Parameter Maps that define aspects of how data will be loaded into the warehouse and how it will display in reports. The User Guide also includes information about the Banner EDW business concepts and Cognos cubes delivered with the warehouse.

• Banner EDW Stars Reference Guide

The *Banner EDW Stars Reference* guide is a manual that supplements information about the warehouse. This guide includes summary information about each of the stars in the warehouse with hypertext links to each of the star diagrams. You can refer to the *Banner EDW Stars Reference* guide to get more information about the student-related stars.

The *Banner EDW Stars Reference* guide is delivered as a zip file that is a compilation of PDF files including the actual *Banner EDW Stars Reference* guide and all of the warehouse star diagrams. You can download the zip file from the Documentation and Download area of the Customer Support Center under the "Cross Product - Enterprise Data Warehouse" product.

Banner Performance Reporting and Analytics Resource Guidelines

The BPRA Resource Guidelines document includes hardware and software recommendations for all of the BPPA products. This document also includes compatibility information describing which Banner, Oracle, and Cognos product releases are compatible with each of the BPRA products.

Overview

2 Business concepts

Business concepts are used to organize the data available for different reporting requirements. A business concept shows the relationships between the data supporting a set of business processes. Because different business processes often require different perspectives on data, the relationships among the supporting database objects need to change based on the analysis you need to perform.

You can use a business concept with the Cognos Business Intelligence (BI) tools to define a Cognos Framework Manager (FM) model. You can then publish multiple packages that present the data in the model. By identifying subsets of the data that answer specific business questions, you can create and develop multiple packages from the delivered FM Models for a specific group of end users making it easier for them to produce reports for their specific needs

The Cognos Framework Manager (FM) tool enables you to use database objects in multiple FM models. These are each referred to as a namespace. In a Framework Manager Namespace, database objects are defined as Cognos metadata query subjects. In that namespace the relationships between the different query subjects focus around a central, primary, or aggregated fact table.

All data analysis and reporting completed using the business concept use the central fact table to filter and determine what data to retrieve. However, if that data is for a person or person and academic period not included in the central or aggregate fact table then that data will not be reported.

The following types of business concepts are delivered with the Performance products:

- Base business concept that permits reporting from a group of operational star schema
- Snapshot business concept that permits reporting from a star schema that presents data at a point in time or data captured for a business event

Base business concept?

The base version of a business concept combines all of the desired data to be used for that reporting purpose.

Snapshot business concept?

The snapshot version of a business concept includes the same information as the base version of the concept and an additional event dimension. You can use the event dimension to load the warehouse with a complete version of the base business concept data pulled from the data store at a point in time. This event gives you a static version of the data for a specific event.

You can define events in the EVENT parameter using the Administrative User Interface.



Refer to the "Administrative User Interface" chapter of the *Banner EDW Administration Guide* for information about defining the EVENT parameter.

Business concepts for Banner Student Retention Performance

The Banner Student Retention Performance product contains business concepts based on the following Cognos Framework Manager (FM) Models:

- PM Analyze Student Progress
- Snapshot PM Analyze Student Progress
- PM Analyze Student Engagement
- Snapshot PM Analyze Student Engagement

A business concept is a way to organize data in the warehouse to answer specific business questions. There is a balance between providing all data available and the right amount of data to serve the business purpose.

The content of the Student Retention Performance business concepts is similar because they both respond to business questions regarding student retention at an institution. These business concepts use the same academic period, retention period, and multi-year measures. The difference is that the PM Analyze Student Progress business concept focuses on the details of a student's performance and progress toward his educational goal while the PM Analyze Student Engagement business concept focuses on the details of how the institution engaged the student. You can use the business concepts to analyze whether student progress or engagement has an impact on a student's persistence at or their retention by the institution.

In addition to the measures, there are other similarities and some major differences between these business concepts. The PM Analyze Student Progress business concept contains student course data and more academic outcome details. This data emphasizes the students who are progressing or being successful and those who are not. The data provided includes overall progress measures like Cumulative GPA and Total Credits Earned. The key enrollment data is included, such as first and last academic period attended, number of academic periods attended, outcome completion data and credits attempted, passed and failed. Additionally the next layer of detail regarding specific courses attempted and completed with course detail is a part of this business concept. The data for this business concept comes from Banner source data.

The PM Analyze Student Engagement business concept includes interactions, campaign, and communication details. This data emphasizes whether the type or number of engagements has any impact on the student persisting or being retained by the institution. The data for this business concept comes from both Banner and Banner Relationship Management to measure the number and frequency of the contacts and interactions. Additionally, this business concept contains data to measure progress, key enrollment data and overall performance summary data.

The Student Retention Performance product is delivered with a single package published from each of the business concepts. Your institution may need to do reporting using all or some of the query items defined in that package. Your institution will also have many users with different reporting requirements. To make reporting easier, you can publish multiple packages from the FM model, selecting the specific items that a set of users require to satisfy their business needs.

For example, from the PM Analyze Student Progress you might publish two additional packages, one for the Primary Academic Advisor and one for the Athletic Director. The first new package could include the basic content for Academic Period Measures Sequential and the Student Course and Demographic query items because this person may assist the student planning the next academic period schedule and past course performance would be important. The second new package could include the same measure or add the Multi Year Measures but include the Athletic, Student Enrollment and Academic Performance query items because this person may be focused on ensuring the student is performing so they can continue their athletic participation.

The following diagram highlights the primary differences between the two packages. The snapshot versions of each package have the same differences and also both contain the Event query subject.

PM Analyze Student Progress

PM Analyze Student Engagement Focused on interaction, communication side

Focused on academic side

* Red text indicates differences between query subjects

Query Subject Academic Performance Academic Performance Filter Academic Period First Attended Attributes Academic Period First Attended Attributes Query Subject Academic Study Academic Study Query Subject Academic Time Academic Time Filter Academic Year Range Activity Query Subject Activity Activity Query Subject Athletic Athletic Query Subject Campaign Query Subject Communications Query Subject Contact Contact Query Subject Demographic Demographic Query Subject Highest Tests Query Subject Hold Hold Folder Institutional Values Interaction Filters Query Subject Interactions Interactions Query Subject Internal Keys Internal Keys Query Subject Person Person Query Subject Post Secondary School Post Secondary School Filter Primary Advisor Primary Advisor Pri			[
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Query Subject Student Status Indicators Student Status Indicators Query Subject Test		Student Multi-Year Measures	Student Multi-Year Measures
Query Subject Test	Query Subject	Student Retention Status	Student Retention Status
, ,		Student Status Indicators	Student Status Indicators
Folder Test Filters	Query Subject	Test	
	Folder	Test Filters	

PM Analyze Student Engagement business concept

The PM Analyze Student Engagement business concept enables you to measure student retention from one academic period (like or sequential) to another; examine summary academic performance and student enrollment data; and review detail data for all types of student engagements recorded via Banner Student or Banner Relationship Management. The data for this business concept comes from both Banner and Banner Relationship Management.

You can use this business concept to measure student retention and engagement at the institution by examining the records for the students who are retained and those not retained. A student record exists for each academic period in which the student is eligible and expected to register.

NOTE: The students and academic periods are of the same set of student and academic periods available in the PM Analyze Student Progress business concept.

Also, this business concept includes the three sets of the same measures. The main measures can be found in one of the following query subjects:

- Student Academic Period Measures query subject, which contains academic period specific measures that work with an academic time query item or retention period query items within the Retention Like and Retention Sequential folders
- Student Multi-Year Measures query subject, which contains multi-year graduation and retention specific measures based on the student's academic period first attended

Data in the PM Analyze Student Engagement business concept allows you to answer the following business questions:

- How do college retention and completion rates vary among groups of students based on criteria, such as financial assistance, geography, and ethnic/minority group?
- How effective are my retention programs and strategies?
- What is the relationship between students' academic qualifications and subsequent first year college performance and retention to second year?
- How effective are my academic support programs and services in helping meet retention goals?
- What group or cohort of students should my retention strategies focus on?
- Are any of these observations made for the current year a consistent trend in the last three years or more?

- Are students academically prepared to enter college and complete their program or degree as per schedule?
- What are the student's goals and is the student achieving these goals?
- What do enrollment and course taking data indicate about the likely retention and degree completion rates of students?
- What are the characteristics of students who drop out during their second year in the program?
- How is the retention rate of certain classes of students affected by their domestic or overseas status?
- Within this population, what similarities exist between departments and/or across programs?
- Which programs are performing the best in graduating students as per schedule?
- How do older students compare to younger students in course completion in the institution, across departments, programs, by gender, or by socio-economic class?

PM Analyze Student Engagement query subjects

The PM Analyze Student Engagement business concept enables you to measure and analysis whether the type and number or frequency of engagements have an impact on student retention.

The delivered PM Analyze Student Engagement Cognos package includes all the data elements in the PM Analyze Student Engagement business concept data model. The following sections give a business definition or description for the query subjects and filters specified in this package.

Academic Time

The Academic Time query subject includes attributes used to group student data in relevant time frames, such as academic year and academic period. You can use these attributes to select a population of students or identify attributes assigned. Academic Time query items permit trend and comparison reporting in different time frames.

Student Filters

The filters in the Student Filters folder allow you to select a subset of the data in the report based on the person's with the student level filter used. When delivered, these filters are defined to select the set of students whose primary curriculum has a student level value of undergraduate, graduate, or professional.

You should define which of your institution's Student Level Codes correspond to the Undergraduate, Graduate, and Professional levels within your Cognos FM Model and associated packages in the STUDENT LEVEL Parameter Map.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining Parameter Maps.

Student Status Indicators

The Student Status Indicators query subject includes a set of indicators that enable you to select a subset of students to analyze common attributes. For example, by selecting the appropriate student status indicator and filtering the group by the positive or by the negative value, the generated report may contain information on students with housing assignments, who apply for a degree, or new students for the academic period. The set of indicators can be used individually or in combination to isolate a set of students who meet that criterion for an academic period. Each indicator is based on a specific piece of data defined within the Banner Student system.

NOTE: Refer to the published Meta Data reports for more detail information regarding a specific student status indicator.

Student Retention Status

The Student Retention Status query subject includes a set of attributes with the values Retained, Not Retained, or Excluded that identify the retention status from one registered academic period to the next for each student. These attributes identify whether a student counts in the overall, student level, program, and college retention headcounts for the Retention Period (like or sequential).

The retention status can only be determined for students who are registered from one academic period to the next. If a person does not register or is excluded in one academic period, his retention status for the next academic period is set to No Data for that retention period. Once a person is registered for an academic period, he will be evaluated for the next retention periods (like and sequential).

Student Academic Period Measures

The Student Academic Period Measures query subject provides three sets of values. The first are specific to the academic period, the second and third use two academic periods to report retention like or sequential respectively. The following are used to determine who is included in these measures:

• Student headcount - Academic period headcount of potential students determined by the following Banner data:

- Student status (STVSTST) where the student is permitted to register
 (STVSTST_REG_IND = Yes)
- Those who are new students (SGBSTDN_TERM_ADMIT)
- Those who have registered in the readmit academic period (SOBTERM_READM_REQ) or in an academic period later than the readmit academic period
- Where the student status does not permit registration
 (STVSTST_REG_IND = No) but the student has an awarded academic outcome record.

Student headcount is limited by the number of students permitted to register, those who met the latest registered academic period, and when the academic period follows the academic period pattern defined in the ACADEMIC PERIOD PATTERN EDW Extract Parameter.

NOTE: Refer to the Data Set Up chapter of the Student Retention Performance Handbook for more information about defining the EDW Extract Parameters.

- Enrolled headcount Academic period headcount of students with an enrollment status (STVESTS) where the status affects the headcount (STVESTS_EFF_HEADCOUNT is set to Yes).
- Registered headcount Academic period headcounts of students registered for at least one course section (SFRSTCR) record with a registration status (STVRSTS) where the student is in the seat count (STVRSTS_INCL_SECT_ENRL is set to Yes).
- Student not registered headcount Academic period headcounts of students not registered or those with no enrollment activity for the academic period (no SFBETRM or SHRTTRM).
- Withdrawn headcount Academic period headcounts of students who were
 registered but have changed their enrollment status (STVESTS) to one with a Yes
 in the withdrawn indicator (STVESTS_WD_IND or
 STVESTS_THIRD_PARTY_WD_IND).

NOTE: Student headcount is the sum of the registered headcount, withdrawn headcount, and the student not registered headcount for the academic period (Registered Headcount + Withdrawn Headcount + Not Registered Headcount = Student Headcount).

Specific Retention Measures

Retention measures provide information on whether a student who registered in the reporting academic period (the first one named in the Retention Period) are also registered in the next academic period (the second one named in the Retention Period). Retention measures are available for the following academic periods:

- Like academic periods Academic periods that are identical, but a year apart as defined in the ACADEMIC PERIOD LIKE EDW Extract Parameter
- Sequential academic period Academic periods defined in an institution rule as one following the other as defined in the ACADEMIC_PERIOD_SEQUENTIAL EDW Extract Parameter

NOTE: Refer to the published Meta Data reports for more detail information regarding a specific student status indicator.

The measures include information on retention headcount, retention rate, excluded headcount, and non-persister headcount and non persister rate for overall institution retention, program, college, or within student level for a retention period.

- Retention Headcount and Retention Rate includes a distinct count of students who
 register in the next like or sequential academic period and are, therefore, retained.
 The rate is the Retention Headcount divided by the Initial Registered Headcount
 minus the Excluded Headcount.
- Non-Persister Headcount and Non-Persister Rate includes a distinct count of students who do not register in the next like or sequential academic period and, therefore, are not retained. The rate is the Non-Persister Headcount divided by the Initial Registered Headcount minus the Excluded Headcount.
- Excluded Headcount includes those students excluded from Retention Headcounts and Rates because they are either deceased, graduated, or have an institution defined enrollment status (STVESTS) or student status (STVSTST), which identify they are excluded from the population as an allowable exclusion, for example, active military service or peace corps. You define these codes in the EXCLUSION STATUS CODE EDW Extract Parameter.

NOTE: Refer to the published Meta Data reports for more detail information regarding a specific student status indicator.

Retention, Non Persister and Excluded Headcount are always determined starting with the Initial Registered Headcount of the retention period from academic periods looking to the next academic period (like or sequential) registration status. Excluded persons are considered only in the next like or sequential academic period that follows one in which they are included in the initial registered headcount.

Academic Period First Attended Attributes

The Academic Period First Attended Attributes filter enables you to filter all attributes selected for the report to extract data recorded for the first academic period attended by each student. The academic period first attended is set for the student by the academic period for which they have registration activity.

NOTE: The Academic Period First Attended is used to calculate multi year measures.

Student Multi-Year Measures

The Student Multi-Year Measures query subject provides the following information for the overall institution as well as within student level, program, and college. The information is tracked from the student's first academic period attended (which identifies the student in the initial registered headcount) then evaluates and tracks the retention status for each subsequent academic year through eight years.

Student Multi-Year Retention Measures

- X Year Retention Headcount and Rate includes a distinct count of students who
 register in the next like academic period and are, therefore, retained. The rate is the
 Retention Headcount divided by the Initial Registered Headcount minus the
 Excluded Headcount.
- X Year Non-Persister Headcount and Rate includes a distinct count of students who do not register in the next like academic period. As of the like academic period year, when the student is not retained, they are set to Non-Persister and their retention status is not checked. The rate is the Non-Persister Headcount divided by the Initial Registered Headcount minus the Excluded Headcount.
- X Year Retention Excluded Headcount PM Analyze Student Progress- includes those students excluded from Retention Headcounts and Rates because they are either deceased, graduated, or have an institution defined enrollment status (STVESTS) or student status (STVSTST), which identify they are excluded from the population as an allowable exclusion, for example, active military service or peace corps. You define these codes in the EXCLUSION_STATUS_CODE EDW Extract Parameter.

NOTE: Refer to the published Meta Data reports for more detail information regarding a specific student status indicator.

Student Multi-Year Graduation Measures

- X Year Graduation Headcount and Rate includes a distinct count of students who
 have an outcome awarded indicator in one of the academic periods within the next
 academic year. The rate for graduation is the cumulative headcount (all years to the
 current) divided by the Initial Registered Headcount minus the Graduated Excluded
 Headcount.
- X Year Graduation Excluded Headcount includes those students excluded from Graduation Headcounts and Rates because they are either deceased or they have an EXCLUSION_STATUS_CODE EDW Extract Parameter defined.

The Student query subject provides academic period specific characteristics or attributes that include the following information:

Student

- Student population, such as new, transfer, and continuing
- Admission population, such as regular admit, mature admit, and early admit
- Educational goal, such as earn a bachelor degree or upgrade job skills and educational level (secondary school graduate, associate degree, previous bachelor degree)
- Student classification, such as first year, second year, freshman, and sophomore.
- Residency, such as in district, out of district, European Union, and Other
- Student cohort data
- · Student attribute data

Academic Study

The Academic Study query subject provides details about the student's primary program of study or curriculum for the academic period (concurrent curriculum are not included). The Banner data (SORLCUR/SORLFOS) identified with the highest priority sequence active/current curriculum for the academic period is considered as the primary program. It includes the following information:

- Student level (undergraduate, graduate, or professional)
- Degree, college, major, and department

This single set of academic study detail reflects the current priority program curriculum (SORLCUR/SORLFOS) associated with the student for the academic period. As this data changes those changes are reflected in the overall attributes by academic period.

NOTE: If you want to compare the academic study details for either the academic period admit or academic period graduation, please use the PM Analyze Student Progress business concept.

Student Enrollment

The Student Enrollment query subject provides a subset of overall enrollment data for each academic period attended by the student that includes the following data:

· Academic period first and last attended

NOTE: These will be reported as the same values for each report academic period within a student level.

• Enrollment status, leave details, withdrawn reason, institution attending, academic periods attended, and total academic periods attended

Academic Performance

The Academic Performance query subject provides attributes and measures that identify a student's progress toward their educational goal. This business concept contains a subset of the following information:

- Credits attempted, passed, earned, quality points and credits for GPA as defined by the final grade. There are two sets of credits available include:
- Total, which is the sum for the academic period reported only for student courses with a course source = 'Registration' or 'History'
- Cumulative, which is the total of all cumulated credits through the academic period reported for all student courses regardless of course source

NOTE: For more detail breakdown by course source use, the PM Analyze Student Progress business concept and the Student Course query subject.

- GPA as assigned by the student course final grades, cumulative, academic year, academic period, and previous academic period
- Academic standing (beginning and end of each academic period)

NOTE: Begin Academic Standing will be either the override academic standing from the student record (SGBSTDN_ASTD_CODE) or the academic standing end from the previous history term header record (SHRTTRM_ASTD_CODE_END_OF_TERM).

Person

The Person query subject provides the basic person identification data, such as full name, ID, birth date, confidentiality indicator, current age, e-mail address, and phone number.

NOTE:

- When a person has multiple sets of information, such as e-mail address, phone number, and postal address, only a single record is loaded.
- When data is loaded for non-Banner entities, such as organization constituents, vendors, and third parties, they will not appear in this business concept.

Demographic

The Demographic query subject provides diversity information such as gender, minority, ethnicity, race, and race category codes, traditional and current age, marital status, disabilities, residency and citizenship data, visa, and veteran information. Most of this data remains constant once recorded for the person and will be the same for each academic period. When this data changes, only the current values are stored and available in the data warehouse with the exception of any data captured in a snapshot that stores the key to the valid row of data at the time the data was captured.

Student Address

The Student Address query subject provides the preferred address recorded for the student and identified by a rule defined by your institution. This rule is stored as a GTVSDAX rule for the PREFADDR parameter used to load the data warehouse table within the Banner ODS with the preferred address indicator set to 'Yes'. It also provides additional address attributes identifying a geographic division and region, when available based on the STUDENT GEOGRAPHIC REGION EDW Extract Parameter.

When Banner Advancement is used, the preferred address rule is overridden by the student specified preferred address recorded using an advancement form.

NOTE: Refer to the Banner General GTVSDAX handbook for more information on defining PREFADDR parameter.

Interaction Filters

The Interaction Filters folder includes a pre-defined set of filters that make it easy to select any of the following sets of interactions from the folder that includes all interactions:

- Manual Interaction Source only interactions that are stored with the source 'ManuallyEntered'
- Latest Category Interaction displays the interaction with the latest dates within an interaction category
- Latest Category Type Interaction displays the interaction with the latest dates within an interaction category and type combination

Interactions

The Interactions query subject includes data that you can use to divide, classify and analyze student interactions that include Banner Student contacts and Banner Relationship manager communications, EM campaign and manual interactions by type, and categories.

There are three sets of data separated into folders within the Interactions query subject. They include All Interactions, Interactions within Academic Period (interaction dates between the academic period begin and end date), and Student Interactions (interactions since Academic Period Admit recorded for the student and student level (interaction dates equal to or later than the academic period admit begin date). Each set of interaction data includes the following types of data:

- Interaction source, type and category
- Interaction organization (up to three levels display but up to 5 levels are stored)

· Interaction date

• Latest interaction indicators identifying latest interaction by category type, category, organization, organization category, organization category type and the overall latest interaction and interaction aging

The measures include the count of interactions for the person and the number of days since the last interaction.

Activity

The Activity query subject includes all student activities tracked by the institution. Although a student may have many non-academic pursuits, the institution determines the activities to track, and records those by academic period in Banner (SGRSACT). When your institution defines the activities to be recorded, you may optionally group the activities for reporting using an activity type and an activity category on the activity definition form.

NOTE: Although all Banner activities recorded in Banner will be in the data warehouse, only the activities for an academic period will display for a person when using an academic period in a report.

Activity data includes the following:

- Activity, type, and category
- First year, last year, and total years, first academic period and last academic period and total academic period each activity is recorded

The measures include the count of activities in which the student has participated.

Advisor Assignment

The Advisor Assignment query subject provides details of all advisors assigned to a student with information on their advisor type and if they are the primary advisor for the student.

The measures include the number of students for an advisor and the number of advisors for a student.

Athletic

The Athletic query subject provides data identifying participation in athletic teams, official or auxiliary. The attributes in this query subject include:

- Sport, sport status, whether the participant is active in the sport
- Eligibility, athletic aid received, the first and last academic period of participation
- Eligibility begin and end academic periods, first and last year

The measures include the number of seasons of competition available, used, and remaining.

Campaign

The Campaign query subject includes campaign name, status, start and stop dates, and aging groups that may be used to analyze the students in a campaign.

The following measures are included:

- Campaign Count number of campaigns a person is a part of
- Campaign Headcount distinct number of persons involved in a campaign
- Person Campaign Duration days number of days a person was in a campaign or number of days until today's date if ongoing. The CAMPAIGN DURATION AGING Parameter Map permits the institution to define the aging ranges to be used by the institution.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining Parameter Maps.

Communications

The Communications query subject includes attributes that you can use to divide, classify and analyze communications sent to students using the Banner Relationship Management (BRM) communications such as emails, letters, or targeted announcements sent to a student's portal account.

Following are some attributes related to communications:

- Communication, Communication method and status Communication Organization Structure - (up to three levels will display but five are stored)
- Campaign Communication Ind identifies whether the communication is part of a campaign
- Initial Communication Ind identifies a person's first communication

 Person Communication Opt Out Ind - identifies whether a person has chosen to opt out of mass emails

The measures include a headcount of persons and a count of communications for a person.

NOTE: Any Banner baseline data for communications or mail pending or sent from any Banner product are not included in this business concept. They are included only in the PM Analyze Student Progress business concept in the Banner Communication query subject.

Contact

The Contact query subject provides all the contacts stored in the Banner system. There are three sets of data that view the contacts. They include All Contacts, First Contact, and La Contact. Within these three folders, you will find the data that used to identify the contact type and date details, and first and latest contacts.

The measures include the count of contacts and latest contact days.

NOTE: The Banner contacts are specific to a person; they are not associated with an academic period. Be aware that most of the Banner contact data is repeated in Interactions.

Financial Aid Information

The Financial Aid Information query subject includes indicators that identify whether the student is a financial aid applicant. This query subject also provides information on the following financial aid statuses:

- Indicators for need eligible and if need is fully met
- Indicators for aid offered, accepted and paid
- Needs analysis ranges for gross need, total family contribution and remaining unmet need
- Percent of aid by financial aid type (grant, loan, scholarship, or work) and financial aid source (federal, state or province, institution, other), percent gift, self-help aid, and the percent of need met by the gift

Hold

The Hold query subject includes details on holds, originating office, active indicator, hold dates, and the specific Banner processing stopped by the hold type. Measures include the number of holds the person had that may be reported by type, active indicator, and over a period of time.

NOTE: Holds are specific to a person; they are not associated with an academic period. The active indicator identifies the holds in place based on the system date. The hold

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indicators are tied to the hold type and not specific to whether the hold active indicator is equal to 'Yes'.

The measures include a count of holds. When used with the Active Hold Indicator, hold count will be divided into the numbers that are still in effect.

Interest

The Interest query subject includes the interests recorded for the person. The person may have many interests but the institution defines and tracks those that are of interest to the institution. Interests are not stored by academic period but by person.

Post Secondary School

The Post Secondary School query subject includes a subset of details of all post secondary schools (including the home institution) attended by the student. Attributes for the institution include name and select institution indicators defined in EDW Extract Parameters for private, public, two or four year institutions defined as INSTITUTION CHARACTERISTIC EDW Extract Parameter. Student specific data includes degrees and majors, transfer GPA range, transfer credit range attributes.

NOTE: The Post Secondary School query subject will include your institution as an institution to include academic outcome data for sought and awarded outcomes which may be required for admissions, graduate studies, employment, and so on.

The measures include post secondary school GPA, transfer credits granted, and class rank and size.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining the EDW Extract Parameters.

Secondary School

The Secondary School query subject includes information on the last secondary school attended by the student. Attributes for the institution include name, select institution indicators defined in INSTITUTIONAL CHARACTERISTICS EDW Extract Parameters for private, public, and home schooled.

The measures include the secondary school GPA and secondary school percentile.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining the EDW Extract Parameters.

Highest Tests

The Highest Tests query subject includes the highest test details with scores for all recorded qualification and placement tests recorded on Test Information (SORTEST).

NOTE: The Banner tests are specific to a person; they are not associated with an academic period. Test scores not recorded as numeric will not be loaded into the data warehouse.

Internal Keys

The Internal Keys query subject contains PERSON UID and unique keys that can be used for complex queries required for complicated Report Studio reports.

Report Default Selections

The Report Default Selections query subject includes values that can be used in a report to simplify the query or to display an initial value. You should define these selections in the REPORT DEFAULT SELECTIONS Parameter Map and add them to this query subject if desirable.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining Parameter Maps.

Institutional Values

The Institutional Values query subject defines a default set of information to be used by your institution as basic information to display on all reports that use the Template delivered with the product. This includes contact information for assistance with reporting. You should define these default values in the REPORT HELP TEXT and RELEASE INFORMATION Parameter Maps.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining Parameter Maps.

Snapshot - PM Analyze Student Engagement business concept

The Snapshot - PM Analyze Student Engagement business concept enables you to measure student retention at a point in time from one academic period (like or sequential) to another. This snapshot business concept is a copy of the Snapshot - PM Analyze Student Engagement business concept. It includes the same attributes and measures that allow you to examine summary academic performance and student enrollment data and review detail data for all types of student engagements recorded through the Banner

Student or Banner Relationship Management systems. This version of the business concept lets you compare the data by an event or point in time.

You can use this snapshot business concept to measure student retention and engagement at the institution by examining the records for the students who are retained and those not retained as of the institution specified events.

The warehouse data is continually changing based on your institution's policies and procedures for gathering and inputting data and the schedule used to refresh the warehouse data. To capture these changes and allow for comparison across time, you need to determine your institution's significant time events and create those events in the Event parameter in the Administrative User Interface. Once events are created, each time you load the data warehouse you can select the appropriate Event to associate with that snapshot of the data.

For example, it may be important to compare potential retention headcount by viewing the data during the registration period (one week before classes, two weeks before classes, and so on). You may also want to view actual retention headcounts after registration ends and during the academic period (First Day of Classes, End of Drop/Add, Census Date 1, Mid Academic Period, End of Academic Period). You would create an Event parameter record for each of these institution milestones.

NOTE: Depending on your institution's needs, you might use some or all of the same Events for this snapshot business concept that you use for the related Snapshot - PM Analyze Student Progress business concept. You can create the overlapping Events once in the Administration UI and use them for both business concepts. You can also create Events unique for each business concept. For example, you may have a need for weekly or monthly snapshots for this business concept so that you can compare the levels of interaction for the same timeframes from year to year.

The only difference between the main business concept and its snapshot is the addition of an EVENT_KEY stored with each row of data that is specific to the person and academic period. The published package contains an additional query subject named "Event". The Event query subject includes the institution defined Event along with the associated event date, event category, event type, and event. This lets you group by any of these values within reports based on the snapshot business concept.

NOTE: Instead of the base business concept, the Snapshot PM Analyze Student Engagement is used as the data source for the PM Student Engagement Analysis cube.

PM Analyze Student Progress business concept

The PM Analyze Student Progress business concept enables you to measure the following types of information:

- Student retention from one academic period (like or sequential) to another
- Student retention from one academic year to the next (multi-year retention)
- Academic performance and progress
- Academic outcome (tied to their priority curriculum record) sought or awarded at the institution
- Student course details

You can use this business concept to measure student retention, performance, and progress at the institution by examining the records for the students who are retained and those not retained. A student record exists for each academic period in which the student is eligible and expected to register. This is determined based on an active student record with a student status that permits the student to enroll.

The data for this business concept comes from Banner source data.

All "active" students will have a record in this business concept for each academic period in which they are registered, are a new admit (academic period admit), or who have registered in or later than the re-admit academic period specified by the institution on the Term Control Form. When the institution has not defined a re-admit required value on the term control page, the data warehouse will use the academic period being loaded in the same way it would use that readmit required. The academic period records are created based on the ACADEMIC_PERIOD_PATTERN EDW Extract Parameter. This EDW Extract parameter identifies a student characteristic like student level and the pattern of academic periods in which persons with that student level are permitted to register.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining the EDW Extract Parameters.

This business concepts contains multiple measures, logically divided into different query subjects that can be used in analysis. The main measures can be found in one of the following query subjects:

- Student Academic Period Measures query subject, which contains academic period specific measures that work with an academic time query item or retention period query items within the Retention Like and Retention Sequential folders
- Student Multi-Year Measures query subject, which contains multi-year graduation and retention specific measures based on the student's academic period first attended

Data in the PM Analyze Student Progress business concept allows you to answer the following business questions:

- How do college retention and completion rates vary among groups of students based on criteria, such as financial assistance, geography, and ethnic/minority group?
- How effective are my retention programs and strategies?
- What is the relationship between students' academic qualifications and subsequent first year college performance and retention to second year?
- How effective are my academic support programs and services in helping meet retention goals?
- What group or cohort of students should my retention strategies focus on?
- Are any of these observations made for the current year a consistent trend in the last three years or more?
- Are students academically prepared to enter college and complete their program or degree as per schedule?
- What are the student's goals and is the student achieving these goals?
- What do enrollment and course taking data indicate about the likely retention and degree completion rates of students?
- What are the characteristics of students who drop out during their second year in the program?
- How is the retention rate of certain classes of students affected by their domestic or overseas status?
- Within this population, what similarities exist between departments and/or across programs?
- Which programs are performing the best in graduating students as per schedule?
- How do older students compare to younger students in course completion in the institution, across departments, programs, by gender, or by socio-economic class?
- How many students dropped a course after receiving an estimated grade of C or below?
- What group or cohort of students should retention strategies focus on?

PM Analyze Student Progress query subjects

The PM Analyze Student Progress business concept enables you to measure how students are progressing in their study at the institution.

The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model. The following sections give a business definition or description for the query subjects and filters specified in this package.

Academic Time

The Academic Time query subject includes attributes used to group student data in relevant time frames, such as academic year and academic period. You can use these attributes to select a population of students or identify attributes assigned. Academic Time query items permit trend and comparison reporting in different time frames.

Student Filters

The filters in the Student Filters folder allow you to select a subset of the data in the report based on the person's with the student level filter used. When delivered, these filters are defined to select the set of students whose primary curriculum has a student level value of undergraduate, graduate, or professional.

You should define which of your institution's Student Level Codes correspond to the Undergraduate, Graduate, and Professional levels within your Cognos FM Model and associated packages in the STUDENT LEVEL Parameter Map.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining Parameter Maps.

Student Status Indicators

The Student Status Indicators query subject includes a set of indicators that enable you to select a subset of students to analyze common attributes. For example, by selecting the appropriate student status indicator and filtering the group by the positive or by the negative value, the generated report may contain information on students with housing assignments, who apply for a degree, or new students for the academic period. The set of indicators can be used individually or in combination to isolate a set of students who meet that criterion for an academic period. Each indicator is based on a specific piece of data defined within the Banner Student system.

NOTE: Refer to the published Meta Data reports for more detail information regarding a specific student status indicator.

Student Retention Status

The Student Retention Status query subject includes a set of attributes with the values Retained, Not Retained, or Excluded that identify the retention status from one registered academic period to the next for each student. These attributes identify whether a student

counts in the overall, student level, program, and college retention headcounts for the Retention Period (like or sequential).

The retention status can only be determined for students who are registered from one academic period to the next. If a person does not register or is excluded in one academic period, his retention status for the next academic period is set to No Data for that retention period. Once a person is registered for an academic period, he or she will be evaluated for the next retention periods (like and sequential).

Student Academic Period Measures

The Student Academic Period Measures query subject provides three sets of values. The first are specific to the academic period, the second and third use two academic periods to report retention like or sequential respectively. The following are used to determine who is included in these measures:

- Student headcount Academic period headcount of potential students determined by the following Banner data:
 - Student status (STVSTST) where the student is permitted to register (STVSTST_REG_IND = Yes)
 - Those who are new students (SGBSTDN_TERM_ADMIT)
 - Those who have registered in the readmit academic period (SOBTERM_READM_REQ) or in an academic period later than the readmit academic period
 - Where the student status does not permit registration (STVSTST_REG_IND = No) but the student has an awarded academic outcome record.

Student headcount is limited by the number of students permitted to register, those who met the latest registered academic period, and when the academic period follows the academic period pattern defined in the ACADEMIC_PERIOD_PATTERN EDW Extract Parameter.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining the EDW Extract Parameters.

- Enrolled headcount Academic period headcount of students with an enrollment status (STVESTS) where the status affects the headcount (STVESTS_EFF_HEADCOUNT is set to Yes).
- Registered headcount Academic period headcounts of students registered for at least one course section (SFRSTCR) record with a registration status (STVRSTS) where the student is in the seat count (STVRSTS_INCL_SECT_ENRL is set to Yes).
- Student not registered headcount Academic period headcounts of students not registered or those with no enrollment activity for the academic period (no SFBETRM or SHRTTRM).

 Withdrawn headcount - Academic period headcounts of students who were registered but have changed their enrollment status (STVESTS) to one with a Yes in the withdrawn indicator (STVESTS_WD_IND or STVESTS_THIRD_PARTY_WD_IND).

NOTE: Student headcount is the sum of the registered headcount, withdrawn headcount, and the student not registered headcount for the academic period (Registered Headcount + Withdrawn Headcount + Not Registered Headcount = Student Headcount).

Specific Retention Measures

Retention measures provide information on whether a student who registered in the reporting academic period (the first one named in the Retention Period) are also registered in the next academic period (the second one named in the Retention Period). Retention measures are available for the following academic periods:

- Like academic periods Academic periods that are identical, but a year apart as defined in the ACADEMIC_PERIOD_LIKE EDW Extract Parameter
- Sequential academic period Academic periods defined in an institution rule as one following the other as defined in the ACADEMIC_PERIOD_SEQUENTIAL EDW Extract Parameter

The measures include information on retention headcount, retention rate, excluded headcount, and non-persister headcount and non persister rate for overall institution retention, program, college, or within student level for a retention period.

- Retention Headcount and Retention Rate includes a distinct count of students who
 register in the next like or sequential academic period and are, therefore, retained.
 The rate is the Retention Headcount divided by the Initial Registered Headcount
 minus the Excluded Headcount.
- Non-Persister Headcount and Non-Persister Rate includes a distinct count of students who do not register in the next like or sequential academic period and, therefore, are not retained. The rate is the Non-Persister Headcount divided by the Initial Registered Headcount minus the Excluded Headcount.
- Excluded Headcount includes those students excluded from Retention
 Headcounts and Rates because they are either deceased, graduated, or have an
 institution defined enrollment status (STVESTS) or student status (STVSTST),
 which identify they are excluded from the population as an allowable exclusion, for
 example, active military service or peace corps. You define these codes in the
 EXCLUSION_STATUS_CODE EDW Extract Parameter.

Retention, Non Persister and Excluded Headcount are always determined starting with the Initial Registered Headcount of the retention period from academic periods looking to the next academic period (like or sequential) registration status. Excluded persons are

considered only in the next like or sequential academic period that follows one in which they are included in the initial registered headcount.

Academic Period First Attended Attributes

The Academic Period First Attended Attributes filter enables you to filter all attributes selected for the report to extract data recorded for the first academic period attended by each student. The academic period first attended is set for the student by the academic period for which they have registration activity.

NOTE: The Academic Period First Attended is used to calculate multi year measures.

Student Multi-Year Measures

The Student Multi-Year Measures query subject provides the following information for the overall institution as well as within student level, program, and college. The information is tracked from the student's first academic period attended (which identifies the student in the initial registered headcount) then evaluates and tracks the retention status for each subsequent academic year through eight years.

Student Multi-Year Retention Measures

- X Year Retention Headcount and Rate includes a distinct count of students who register in the next like academic period and are, therefore, retained. The rate is the Retention Headcount divided by the Initial Registered Headcount minus the Excluded Headcount.
- X Year Non-Persister Headcount and Rate includes a distinct count of students who do not register in the next like academic period. As of the like academic period year, when the student is not retained, they are set to Non-Persister and their retention status is not checked. The rate is the Non-Persister Headcount divided by the Initial Registered Headcount minus the Excluded Headcount.
- X Year Retention Excluded Headcount PM Analyze Student Progress- includes those students excluded from Retention Headcounts and Rates because they are either deceased, graduated, or have an institution defined enrollment status (STVESTS) or student status (STVSTST), which identify they are excluded from the population as an allowable exclusion, for example, active military service or peace corps. You define these codes in the EXCLUSION STATUS CODE EDW Extract Parameter.

Student Multi-Year Graduation Measures

• X Year Graduation Headcount and Rate includes a distinct count of students who have an outcome awarded indicator in one of the academic periods within the next academic year. The rate for graduation is the cumulative headcount (all years to the current) divided by the Initial Registered Headcount minus the Graduated Excluded Headcount.

• X Year Graduation Excluded Headcount includes those students excluded from Graduation Headcounts and Rates because they are either deceased or they have an EXCLUSION_STATUS_CODE EDW Extract Parameter defined.

Student

The Student query subject provides academic period specific characteristics or attributes that include the following information:

- Student population, such as new, transfer, and continuing
- Admission population, such as regular admit, mature admit, and early admit
- Educational goal, such as earn a bachelor degree or upgrade job skills and educational level (secondary school graduate, associate degree, previous bachelor degree)
- Student classification, such as first year, second year, freshman, and sophomore.
- Residency, such as in district, out of district, European Union, and Other
- Student cohort data
- Student attribute data

Academic Study

The Academic Study query subject provides details about the student's primary program of study or curriculum for the academic period (concurrent curriculum are not included). The Banner data (SORLCUR/SORLFOS) identified with the highest priority sequence active/current curriculum for the academic period is considered as the primary program. It includes the following information:

• Student level (undergraduate, graduate, or professional)

• Degree, college, major, and department

For reporting comparisons, there are three distinct sets of academic study data that are labeled to identify each set. These three sets of information are included so that you have the option to report the number of students who graduate in the program to which they were admitted and those who have changed programs since admissions. Following is a description of the information included with each sets of academic study data:

- The first set of data, located in the base level of the Academic Study query subject folder, reflects the current priority program curriculum (SORLCUR/SORLFOS) associated with the student for the academic period. As this data changes those changes are reflected in the overall attributes by academic period.
- The second set of data, located in the Admit Academic Study sub folder of the Academic Study query subject is defined with the values set for the student in their academic period admit record (SGBSTDN/SORLCUR_ LMOD_CODE =

LEARNER). This set of data will always display the same set of data values for each reporting academic period within a student level.

Additional data identifies if the student changed academic study attributes in the academic period and the number of academic periods to declare a major.

Student Enrollment

The Student Enrollment query subject provides overall enrollment data for each academic period attended by the student that presents the following data for the periods:

· Academic period first and last attended

NOTE: These will be reported as the same values for each report academic period within a student level.

- Initial enrollment date and current enrollment status and date for each academic period with enrollment data
- Enrolled by census date (1 and 2) indicators

NOTE: When the required data is available to determine if at least one student course for the academic period is registered by the census date, the enrolled by census is equal to yes. If registered after census date, enrolled by census is equal to no. When the registered by census data is not available for a student and academic period, the enrolled by census will display 'Data Not Avail' or the institution default description for no data.

Academic Performance

The Academic Performance query subject provides attributes and measures that identify a student's progress toward their educational goal. This data includes the following information:

- Credits attempted, earned, passed, used for GPA and quality points as defined by the final grade assigned. There are two sets of credits available:
 - Total, which is the sum for the academic period reported only for student courses with a course source = 'Registration' or 'History'
 - Cumulative, which is the total of all cumulated credits through the academic period reported for all student courses regardless of course source. You can use the Student Course query subject to access more detail breakdown by course source

- GPA as assigned by the student course final grades, cumulative, academic year, academic period, and previous academic period
- Academic standing (beginning and end of each academic period)

NOTE: Begin Academic Standing will be either the override academic standing from the student record (SGBSTDN_ASTD_CODE) or the academic standing end from the previous history term header record (SHRTTRM_ASTD_CODE_END_OF_TERM). The academic standing override indicator identifies which record was used for the begin academic standing. The end of academic period standing is always from the history record.

• Combined academic standing, Progress evaluation and Dean's List data

Student Course Filters

The student course data includes all courses recorded in Banner Student whether they are transfer (with Course Source value 'Transfer') or institution (in progress or graded, with Course Source values 'Registration' and 'History' respectively). The filters in the Student Course Filters folder allow you to select only the student course and associated details based on the course source type history, registration, and transfer details when required in a specific report.

In the Student Course Filters folder, there is a folder named Faculty Course Feedback Filters, which includes filters that let you narrow report data based on the existence of various feedback related criteria for a course section or a student registered in a course section within a feedback session.

Student Course

The Student Course query subject provides data on all student courses (registration, history, and transfer) with student-specific details, such as the initial registration date, registration status and date, final grade and credits. The student course data includes the following details:

- Basic course information, such as course source (transfer, registration, history), course identification, subject, course number, course reference number, initial registration date, and registration status and date
- Course Indicators folder identifies dropped, withdrawn, and passed or failed courses based on either the registration status or the final grade
- Course Section Detail folder includes information specific to the course section
 and how it was defined in the Schedule (SSBSECT or defaulted from the
 SCACRSE) such as course titles, census dates, schedule types, instructional
 method, cross list, primary instructor, course administration (college, division,
 department) responsible for the instruction and meeting detail information, and all
 instructors assigned to a course for an academic period
- Course Counts and Rates folder includes data for student courses with a course source of registration. This includes the initial registered, registered, dropped and withdrawn counts that may be used for the person and academic period or for the course sections

- Course grades, graded counts, rates and credits include data for student courses that have a final grade so they are a course source of either history or transfer. The grade definition is used to determine if the course is counted in attempted, passed, failed and how the course credits are used in the calculation of each credit
- Faculty Course Feedback Counts and Indicators folder includes indicators that
 you can use to monitor the impact of faculty feedback, for example, Monitored
 Student Ind, Optional Ind, and Feedback Exists Ind. Also includes related
 headcounts and calculated percents for the indicators
- Faculty Course Feedback folder includes several data elements related to faculty course feedback such as Feedback Session, Latest Feedback Instructor Name, and Estimated Grade. Also include folders of related data elements for Latest Issue or Recommendation Date and Latest Comment/Estimated Grade Date

Courses and credits are included for the following student courses by course source: With Course Source = 'Registration' - numbers include registered, withdrawn, and dropped courses and course credits. With Course Source = 'History' or 'Transfer' - the grade symbol rules are used and includes numbers for attempted, passed and failed courses and credits.

NOTE: Student courses with a failed indicator have a grade that counts in Attempted and in the GPA calculation with the passed indicator that is set as 'No'.

The measures include course passed and failed counts and the associated rates, credits, and GPA information.

Person

The Person query subject provides the basic person identification data, such as full name, ID, birth date, confidentiality indicator, current age, e-mail address, and phone number.

NOTE:

- When a person has multiple sets of information, such as e-mail address, phone number, and postal address, only a single record is loaded.
- When data is loaded for non-Banner entities, such as organization constituents, vendors, and third parties, they will not appear in this business concept.

Demographic

The Demographic query subject provides diversity information such as gender, minority, ethnicity, race, and race category codes, traditional and current age, marital status, disabilities, residency and citizenship data, visa, and veteran information. Most of this data remains constant once recorded for the person and will be the same for each academic period. When this data changes, only the current values are stored and available in the data warehouse with the exception of any data captured in a snapshot that stores the key to the valid row of data at the time the data was captured.

Student Address

The Student Address query subject provides the preferred address recorded for the student and identified by a rule defined by your institution. This rule is stored as a GTVSDAX rule for the PREFADDR parameter used to load the data warehouse table within the Banner ODS with the preferred address indicator set to 'Yes'. It also provides additional address attributes identifying a geographic division and region, when available based on the STUDENT GEOGRAPHIC REGION EDW Extract Parameter.

When Banner Advancement is used, the preferred address rule is overridden by the student specified preferred address recorded using an advancement form.

NOTE: Refer to the Banner General GTVSDAX Handbook for more information on defining PREFADDR parameter.

Academic Outcome

The Academic Outcome query subject provides attributes and measures that identify the student's completion of an educational goal or outcome, for example, award, certificate, or degree. This query subject includes the following information:

Outcome Academic Study sub folder of the Academic Study query subject is only available when the outcome or degree record (SHRDGMR/SORLCUR_LMOD_CODE = OUTCOME) is created in Banner Student. As attributes on this record change, they are updated to reflect current outcome values. The outcome academic study values are not expected to change when the outcome is awarded and an academic period graduation is associated with the outcome. The academic study outcome values will display in all of the subsequent academic periods.

NOTE: The outcome academic study data is available if the value set for Outcome Awarded Ind is 'Yes'. Use either the outcome status or the outcome awarded indicator to identify the group of students required for the report requirements.

 Degree credits attempted, earned, passed, and applied to calculation of this outcome degree GPA

NOTE: These are determined using the apply to outcome number entries in SHRTCKD.

- Academic period and Academic Year Graduation the Academic Period Graduation must be recorded to have the student with an outcome awarded indicator equal 'Yes' count in the Graduated Headcount in the Student Academic Period Measures
- Outcome status, outcome honors, and outcome related attributes

Activity

The Activity query subject includes all student activities tracked by the institution. Although a student may have many non-academic pursuits, the institution determines the

activities to track, and records those by academic period in Banner (SGRSACT). When your institution defines the activities to be recorded, you may optionally group the activities for reporting using an activity type and an activity category on the activity definition form.

NOTE: Although all Banner activities recorded in Banner will be in the data warehouse, only the activities for an academic period will display for a person when using an academic period in a report.

Activity data includes the following:

- Activity, type, and category
- First year, last year, and total years, first academic period and last academic period and total academic period each activity is recorded

The measures include the count of activities in which the student has participated.

Advisor Assignment

The Advisor Assignment query subject provides details of all advisors assigned to a student with information on their advisor type and if they are the primary advisor for the student.

The measures include the number of students for an advisor and the number of advisors for a student.

Athletic

The Athletic query subject provides data identifying participation in athletic teams, official or auxiliary. The attributes in this query subject include:

- Sport, sport status, whether the participant is active in the sport
- Eligibility, athletic aid received, the first and last academic period of participation
- Eligibility begin and end academic periods, first and last year

The measures include the number of seasons of competition available, used, and remaining.

Banner Communication

The Banner Communication query subject provides data for all communications and materials recorded in Banner. Banner communications are specific to a person; they are associated with either an academic period, aid year, or the person. Banner Communication data include the following attributes:

 Communication or material and whether it was a part of a communication plan, Academic period, or Aid Year associated with the Banner communication or material

When a Banner communication record has a communication but not a material code, the opposite value points to the other. In other words, if there is a Communication code but no Material code, the Material will say Communication Only or the reverse if there is a Material code but no Communication code.

NOTE: These words may be changed by the institution using the COMMUNICATION Parameter Map values. Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining Parameter Maps.

- Whether the communication or material was the first and/or last sent to the person
- Communication dates including initiated and sent dates
- Whether the communication or material has been initiated but not sent so is still pending

NOTE: Any Banner Relationship Management data for communications and interactions are not included in this business concept; they are only included in the PM Analyze Student Engagement business concept in the Communication and Interaction query subjects.

Contact

The Contact query subject provides all the contacts stored in the Banner system. There are three sets of data that view the contacts. They include All Contacts, First Contact, and La Contact. Within these three folders, you will find the data that used to identify the contact type and date details, and first and latest contacts.

The measures include the count of contacts and latest contact days.

NOTE: The Banner contacts are specific to a person; they are not associated with an academic period. Be aware that most of the Banner contact data is repeated in Interactions.

Financial Aid Information

The Financial Aid Information query subject includes indicators that identify whether the student is a financial aid applicant. This query subject also provides information on the following financial aid statuses:

• Indicators for need eligible and if need is fully met

· Indicators for aid offered, accepted and paid

- Needs analysis ranges for gross need, total family contribution and remaining unmet need
- Percent of aid by financial aid type (grant, loan, scholarship, or work) and financial aid source (federal, state or province, institution, other), percent gift, self-help aid, and the percent of need met by the gift

Hold

The Hold query subject includes details on holds, originating office, active indicator, hold dates, and the specific Banner processing stopped by the hold type. Measures include the number of holds the person had that may be reported by type, active indicator, and over a period of time.

NOTE: Holds are specific to a person; they are not associated with an academic period. The active indicator identifies the holds in place based on the system date. The hold indicators are tied to the hold type and not specific to whether the hold active indicator is equal to 'Yes'.

The measures include a count of holds. When used with the Active Hold Indicator, hold count will be divided into the numbers that are still in effect.

Post Secondary School

The Post Secondary School query subject includes details of all post secondary schools (including the home institution) attended by the student. Attributes for the institution include name, accreditation type, select institution indicators defined in EDW Extract Parameters for private, public, two or four year institutions defined as INSTITUTION CHARACTERISTIC EDW Extract Parameter and address details defined as the INST GEOGRAPHIC REGION EDW Extract Parameter. Student specific data includes degrees and majors, transfer GPA range, transfer credit range attributes.

NOTE: The Post Secondary School query subject will include your institution as an institution to include academic outcome data for sought and awarded outcomes which may be required for admissions, graduate studies, employment, and so on.

The measures include post secondary school GPA, transfer credits granted, and class rank and size.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining the EDW Extract Parameters.

Secondary School

The Secondary School query subject includes information on the last secondary school attended by the student. Attributes for the institution include name, select institution

indicators defined in INSTITUTION CHARACTERISTIC EDW Extract Parameter for private, public, home schooled, geographic, and address details that are defined as the INST GEOGRAPHIC REGION EDW Extract Parameter.

The measures include the secondary school GPA and secondary school percentile.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining the EDW Extract Parameters.

Test Filters

The filters in the Test Filters folder allow you to select for a report information for the highest or the latest test scores (based on the test date associated with the test) recorded for a person.

NOTE: As only numeric test scores are loaded to the data warehouse, the highest numeric score for a test is marked 'Yes'.

Test

The Test query subject includes all test details with scores and test dates for all recorded qualification and placement tests recorded on Test Information (SORTEST). When there is more than one score for the same test, the data contains indicators that identify the highest score and the latest score. Either the indicators or the filters may be used with the test folder to select the highest or latest score only.

NOTE: The Banner tests are specific to a person; they are not associated with an academic period. Test scores not recorded as numeric will not be loaded into the data warehouse.

There are special pre-filtered folders with highest scores for either an institution selected set of placement or qualification tests defined in the TEST_CODE EDW Extract Parameter. These TEST_CODE definitions make specific test scores used in student retention analysis more available for reporting.

Internal Keys

The Internal Keys query subject contains PERSON UID and unique keys that can be used for complex queries required for complicated Report Studio reports. There is also a Cube Identifiers folder that contains database values that are used to populate the Multi Year Retention & Graduation Cube.

Report Default Selections

The Report Default Selections query subject includes values that can be used in a report to simplify the query or to display an initial value. You should define these selections in the

REPORT DEFAULT SELECTIONS Parameter Map and add them to this query subject if desirable.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining Parameter Maps.

Institutional Values

The Institutional Values query subject defines a default set of information to be used by your institution as basic information to display on all reports that use the SGHE Template delivered with the product. This includes contact information for assistance with reporting. You should define these default values in the REPORT HELP TEXT and RELEASE INFORMATION Parameter Maps.

NOTE: Refer to the Data Set Up chapter of the Banner Enterprise Data Warehouse User Guide for more information about defining Parameter Maps.

Snapshot - PM Analyze Student Progress business concept

The Snapshot - PM Analyze Student Progress business concept enables you to measure student retention at a point in time from one academic period (like or sequential) to another. This snapshot business concept is a copy of the PM Analyze Student Progress business concept. It includes the same attributes and measures that allow you to analyze academic performance and progress, student course details, and academic outcome (tied to their priority curriculum record) sought or awarded at the institution. This version of the business concept lets you compare the data by an event or point in time.

You can use this snapshot business concept to measure student retention, performance, and progress at the institution by examining the records for the students who are retained and those not retained as of the institution specified events.

The warehouse data is continually changing based on your institution's policies and procedures for gathering and inputting data and the schedule used to refresh the warehouse data. To capture these changes and allow for comparison across time, you need to determine your institution's significant time events and create those events in the Event parameter in the Administrative User Interface. Once events are created, each time you load the data warehouse you can select the appropriate Event to associate with that snapshot of the data.

For example, it may be important to compare potential retention headcount by viewing the data during the registration period (one week before classes, two weeks before classes, and so on). You may also want to view actual retention headcounts after registration ends and during the academic period (First Day of Classes, End of Drop/Add, Census Date 1, Mid

Academic Period, End of Academic Period). You would create an Event parameter record for each of these institution milestones.

NOTE: Depending on your institution's needs, you might use some or all of the same Events for this snapshot business concept that you use for the related Snapshot - PM Analyze Student Engagement business concept. You can create the overlapping Events once in the Administration UI and use them for both business concepts. You can also create Events unique for each business concept.

The only difference between the main business concept and its snapshot is the addition of an EVENT_KEY stored with each row of data that is specific to the person and academic period. The published package contains an additional query subject named "Event". The Event query subject includes the institution defined Event along with the associated event date, event category, event type, and event. This lets you group by any of these values within reports based on the snapshot business concept.

3 Reports

You can use Cognos to generate and view an extensive package of illustrative reports included with each Performance product. A System Administrator should copy these reports to a shared folder so that you can adapt them to meet your institution's specific needs. All reports include interactive prompts that allow you to use the same report multiple times for different target populations. The package of reports complements the executive scorecards and administrative dashboards. In addition, some of the scorecards and dashboards link to related reports.

Reports are created in Cognos Report Studio, Cognos Analysis Studio, or Cognos Query Studio. You can create simple, ad hoc queries and reports using Query Studio. You can create more complex reports using Report Studio. In Report Studio, you also gain the ability to define a report using a package created from a data model or using a cube defined from the data in a package. Refer to the "Report Studio" and "Query Studio" topics to learn more about these tools.

Reports for Banner Student Retention Performance

The Banner Student Retention Performance product is delivered with an extensive package of illustrative reports. A system administrator should copy the reports to your institution's folder so that you can adapt them to your institution's needs. All reports include interactive prompts that allow you to use the same report multiple times for different target populations. The package of reports complements the executive scorecards and administrative dashboards. In addition, some of the scorecards and dashboards link to related reports.

Within the system, the reports are grouped based on the following packages that house the data for the reports:

- PM Analyze Student Progress
- PM Analyze Student Engagement

Analyze Student Engagement reports

The reports based on the PM Analyze Student Engagement package enable you to measure student retention from one academic period (like or sequential) to another; examine summary academic performance and student enrollment data; and review detail data for all types of student engagements recorded via Banner Student or Banner Relationship Management.

The following Report Studio reports are delivered in the **Student Retention Performance** > **Reports** > **Analyze Student Engagement** folder under the **Public Folders** tab:

- Academic Performance by Activity Comparison Summary
- Academic Performance by Athletic Team Summary
- · Campaign Retention by Academic Study Summary
- Student Academic Performance and Engagement Detail
- Student Engagement Profile
- Student Interaction by Academic Standing Summary
- Student Interactions by Advisor List Detail

The following Query Studio reports are also delivered with this product and based on the PM Analyze Student Engagement package:

- Campaign Retention (Like/Sequential) by Academic Study Summary (Eight reports; "Like" and "Sequential" versions for each of the following academic study categories: College, Degree, Major, and Program)
- Campaign Effectiveness and (Like/Sequential) Retention Trend

Academic Performance by Activity Comparison Summary report

The Academic Performance by Activity Comparison Summary report lets you compare the academic performance characteristics of students involved in individual activities against the total student body as well as all students involved in any activity for an associated activity type. If you do not select an Activity Type when specifying report prompts, that section of the report will not display. The report presents registered headcounts and academic performance measures by student classification for a specified academic period and student level. You can drill on various headcount values to access the Student Academic Performance and Engagement Detail report for further analysis at the student level.

Academic Performance by Activity Comparison Summary

Fall 2006, Undergraduate

Selected Prompts

Student Body Co	Comparison Total Registered Headcount: 372						
Student Classification	Registered Headcount	Registered Credits	Academic Period GPA	Cum GPA < 2.0 Headcount	Cum GPA >= 2.0 Headcount	Cum Credits Earned	Cum GPA
Freshman	344	5.57	2.541	51	217	5.38	2.602
Junior	8	6.38	2.625	0	8	6.38	3.093
Senior	7	4.00	3.167	0	7	4.71	12.254
Sophomore	13	8.54	2.761	0	13	9.15	3.018
Total Student Body Summary	372	6.12	2.774	51	245	6.41	5.242

Activity Type Co	mparison: Frate	rnities/Sororities	s Tota	al Registered He			
Student Classification	Registered Headcount	Registered Credits	Academic Period GPA	Cum GPA < 2.0 Headcount	Cum GPA >= 2.0 Headcount	Cum Credits Earned	Cum GPA
Freshman	38	5.86	2,397	9	21	5.69	2.286
Junior	1	6.00	3.000	0	1	6.00	3.064
Activity Type Summary	39	5.93	2.698	9	22	5.84	2.675

Activities For: F	raternities/Soro	rities	Total Re	egistered Headco			
Activities by Student Classification	Registered Headcount	Registered Credits	Academic Period GPA	Cum GPA < 2.0 Headcount	Cum GPA >= 2.0 Headcount	Cum Credits Earned	Cum GPA
Delta Delta Delta	Sorority						
Freshman	<u>10</u>	5.70	2,438	<u>3</u>	<u>5</u>	5.40	2.438
Junior	<u>1</u>	6.00	3.000	0	<u>1</u>	6.00	3.064
Total	11	5.85	2.719	3	6	5.70	2.751
Activities Summary	11	5.85	2.719	3	6	5.70	2.751

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos package includes all the data elements in the PM Analyze Student Engagement business concept data model.

Business questions

This report answers the following business questions:

• What campus student activities are students engaged in? Are there any indicators that these students are at risk based on the type of activity or number of activities they are involved in?

• How does the academic progress of students engaged in an activity compare to the student population at large? Or to the other students involved in activities within the same activity type?

Academic Performance by Activity Comparison Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level*	Select a student level to specify which level of data to display in the report. Click the Cascade button next to the Student Level prompt to populate the Academic Study prompts.	p_Student Level

Student Activities prompts

The Student Activities prompts let you filter the report based on specific activities a student is involved in. An (*) indicates a required value.

Prompt	Description	Parameter
Activity Category	Select an activity category and click the Cascade button to filter the lists of activity types and activities displayed in the Activity Type and Activity prompts.	p_Activity Category
Activity Type	Select an activity type and click the Cascade button to filter the lists of activity categories and activities displayed in the Activity Category and Activity prompts.	p_Activity Type
Activity *	Select one or more activities to display in the report.	p_Activity Code

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study. Click the Cascade button next to the **Student Level** prompt to populate the Academic Study prompts.

Prompt	Description	Parameter
College	Select one or more colleges to display in the report. Click the Cascade button next to the College prompt to populate the Program and Major prompts.	p_College
Program	Select one or more programs to display in the report.	p_Program
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Student Groupings prompts

The Student Groupings prompts are optional prompts that you can use to filter the report based on the student's population, cohort, attribute and/or classification for the selected term and level.

Prompt	Description	Parameter
Student Population	Select one or more student populations to display in the report.	p_Student Population
Student Cohort	Select one or more student cohorts to display in the report.	p_Student Cohort
	NOTE: Only active cohorts (by academic period) are included in the Analyze Student Engagement business concept.	
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Student Classification	Select one or more student classifications to display in the report.	p_Student Classification

Demographic prompts

These prompts are optional prompts that you can use to filter the report based on certain personal characteristics of a student.

Prompt	Description	Parameter
Gender	Select one or more genders to display in the report.	p_Gender
Citizenship Type	Select one or more citizenship types to display in the report.	p_Citizenship Type
Race Category	Select one or more race categories to display in the report.	p_Race Category
Veteran Category	Select one or more veteran categories to display in the report.	p_Veteran Category

Academic Performance by Activity Comparison Summary - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on some of the values to drill through to the Student Academic Performance and Engagement Detail report. The following table specifies the drill-through parameter values for the Student Academic Performance and Engagement Detail report. These are the parameter values that need to be passed from the Academic Performance by Activity Comparison Summary report to the Student Academic Performance and Engagement Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Activity Category		Pass parameter value	p_Activity Category
p_Activity Type		Pass parameter value	p_Activity Type
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass parameter value	p_Student Level
p_College		Pass parameter value	p_College

Parameter	Required	Method	Value
p_Activity Code		Pass data item value	Activity
p_Campus		Pass parameter value	p_Campus
p_Citizenship Type		Pass parameter value	p_Citizenship Type
p_Degree		Pass parameter value	p_Degree
p_Gender		Pass parameter value	p_Gender
p_Major		Pass parameter value	p_Major
p_Program		Pass parameter value	p_Program
p_Race Category		Pass parameter value	p_Race Category
p_Registration Ind		Pass data item value	Registered Ind For Drill
p_Student Attribute		Pass parameter value	p_Student Attribute
p_Student Classification		Pass data item value	Student Classification
p_Student Cohort		Pass parameter value	p_Student Cohort
p_Student Population		Pass parameter value	p_Student Population
p_Veteran Category		Pass parameter value	p_Veteran Category

Academic Performance by Athletic Team Summary report

The Academic Performance by Athletic Team Summary report lets you compare academic performance characteristics of students involved in individual athletic programs against the total student body as well as all students involved in any athletic program. The report presents registered headcounts, financial aid recipient headcounts, and academic performance measures by student classification, for the specified academic period and student level. You can compare those metrics to all athletic teams as well as the total overall student body. Also, you can drill on various headcount values to access the Student

Academic Performance and Engagement Detail report for further analysis at the student level.

Academic Performance by Athletic Team Summary

Fall 2004, Undergraduate

Selected Prompts

otal Student Body	y Comparison			Total Registered Headcount: 485				
Student Level by Classification	Registered Headcount	Registered Credits	Academic Period GPA	Financial Aid Headcount	Cum GPA < 2.0 Headcount	Cum GPA >= 2.0 Headcount	Cum Credits Earned	Cum GPA
Undergraduate							·	
Senior	2	11.50	2.637	0	0	2	10.00	3.23
Junior	11	17.55	2.812	0	0	11	17.27	3.06
Sophomore	22	12.64	2.725	1	0	22	13.41	3.13
Freshman	450	9.51	2.702	79	46	387	9.11	2.73
Total	485	12.80	2.719	80	46	422	12.45	3.03
Total Student Body Summary	485	12.80	2.719	80	46	422	12.45	3.03

Total Athletics St	ıdent Body Con	ıparison		Total Registered Headcount: 22				
Student Level by Classification	Registered Headcount	Registered Credits	Academic Period GPA	Athletic Aid Headcount	Cum GPA < 2.0 Headcount	Cum GPA >= 2.0 Headcount	Cum Credits Earned	Cum GPA
Undergraduate								
Junior	1	16.00	2,438	1	0	1	13.00	3.082
Sophomore	1	13.00	2.769	1	0	1	13.00	3.175
Freshman	20	7.78	3.054	3	0	19	7.55	2.953
Total	22	12.26	2.754	5	0	21	11.18	3.070
Athletics Summary	22	12.26	2.754	5	0	21	11.18	3.070

Ice Hockey	Total Registered Headcount: 5								
Student Level by Classification	Sport Status	Registered Headcount	Registered Credits	Academic Period GPA	Athletic Aid Headcount	Cum GPA < 2.0 Headcount	Cum GPA >= 2.0 Headcount	Cum Credits Earned	Cum GPA
Undergraduate									
Freshman	Active	<u>3</u>	12.33	3.154	<u>3</u>	0	<u>3</u>	12.33	2.948
Junior	Active	<u>1</u>	16.00	2,438	<u>1</u>	0	<u>1</u>	13.00	3.082
Sophomore	Active	<u>1</u>	13.00	2.769	<u>1</u>	0	<u>1</u>	13.00	3.175
Total 5 13			13.78	2.787	5	0	5	12.78	3.068
Ice Hockey Sur	mmary	5	13.78	2.787	5	0	5	12.78	3.068

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos package includes all the data elements in the PM Analyze Student Engagement business concept data model.

Business questions

This report answers the following business questions:

- How does the academic progress of students engaged in a particular sport compare to the student population at large? Or, to the other students involved in the athletics overall?
- What sports are students engaged in? Are there any indicators that these students are at risk based on the sport they are involved in? Could financial aid be in jeopardy?

Academic Performance by Athletic Team Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level*	Select a student level to specify which level of data to display in the report. Click the Cascade button next to the Student Level prompt to populate the Academic Study prompts.	p_Student Level

Athletics prompts

The Athletics prompts let you filter the report based on the following athletics attributes. An (*) indicates a required value.

Prompt	Description	Parameter
Sport*	Select one or more sports to display in the report.	p_Sport
Sport Status	Select one or more sport statuses to display in the report.	p_Sport_Status
Athletic Academic Eligibility	Select one or more eligibility values to display in the report.	p_Athletic_Acade mic_Eligibility

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study. Click the Cascade button next to the **Student Level** prompt to populate the Academic Study prompts.

Prompt	Description	Parameter
College	Select one or more colleges to display in the report. Click the Cascade button next to the College to populate the Program and Major prompts.	p_College
Program	Select one or more programs to display in the report.	p_Program
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Student Groupings prompts

The Student Groupings prompts are optional prompts that you can use to filter the report based on the student's population, cohort, attribute and/or classification for the selected term and level.

Prompt	Description	Parameter
Student Population	Select one or more student populations to display in the report.	p_Student Population
Student Cohort	Select one or more student cohorts to display in the report.	p_Student Cohort
	NOTE: Only active cohorts (by academic period) are included in the Analyze Student Engagement business concept.	
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Student Classification	Select one or more student classifications to display in the report.	p_Student Classification

Demographic prompts

These prompts are optional prompts that you can use to filter the report based on certain personal characteristics of a student.

Prompt	Description	Parameter
Gender	Select one or more genders to display in the report.	p_Gender
Citizenship Type	Select one or more citizenship types to display in the report.	p_Citizenship Type
Race Category	Select one or more race categories to display in the report.	p_Race Category
Veteran Category	Select one or more veteran categories to display in the report.	p_Veteran Category

Academic Performance by Athletic Team Summary - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on some of the values to drill through to the Student Academic Performance and Engagement Detail report. The following table specifies the drill-through parameter values for the Student Academic Performance and Engagement Detail report. These are the parameter values that need to be passed from the Academic Performance by Athletic Team Summary report to the Student Academic Performance and Engagement Detail report for the drill-through to work properly.

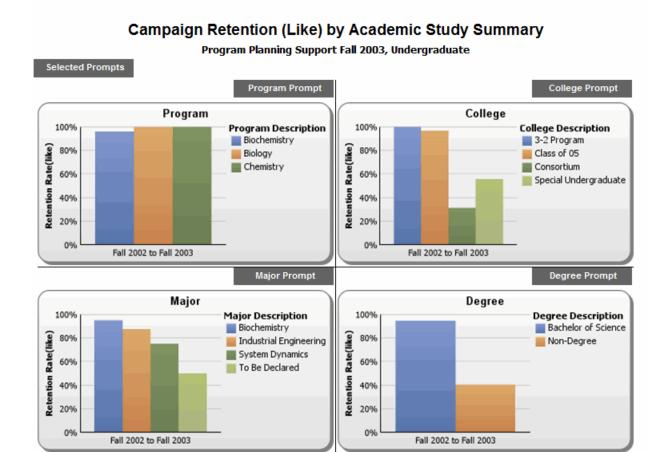
Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass data item value	Student Level
p_College		Pass parameter value	p_College
p_Athletic_Academic _Eligibility		Pass parameter value	p_Athletic_Academic _Eligibility
p_Campus		Pass parameter value	p_Campus
p_Citizenship Type		Pass parameter value	p_Citizenship Type
p_Degree		Pass parameter value	p_Degree

Parameter	Required	Method	Value
p_Gender		Pass parameter value	p_Gender
p_Major		Pass parameter value	p_Major
p_Program		Pass parameter value	p_Program
p_Race Category		Pass parameter value	p_Race Category
p_Registration Ind		Pass data item value	Default Positive Indicator for Drill
p_Sport		Pass data item value	Sport
p_Sport_Status		Pass data item value	Sport Status
p_Student Attribute		Pass parameter value	p_Student Attribute
p_Student Classification		Pass data item value	Student Classification
p_Student Cohort		Pass parameter value	p_Student Cohort
p_Student Population		Pass parameter value	p_Student Population
p_Veteran Category		Pass parameter value	p_Veteran Category

Campaign Retention by Academic Study Summary report

The Campaign Retention by Academic Study Summary report provides a graphical representation of retention rates for students associated to a specific campaign and represented across various academic study categories such as program, college, degree, and major. You can run this report for either Like or Sequential retention periods. Also,

you can drill to the summary level tabular data for each available academic study identifier.



This report displays a set of four graphs, one for each academic study category. Each of the four graphs drills to a report built in Query Studio that you can expand to see student level detail or rerun independently to see summarized level tabular data for each academic study category. There are eight associated Query Studio reports; two versions for each student group based on whether you want to view Like or Sequential retention periods. Following are the four Query Studio reports used by the master report:

- Campaign Retention (Like/Sequential) by College Summary
- Campaign Retention (Like/Sequential) by Degree Summary
- Campaign Retention (Like/Sequential) by Major Summary
- Campaign Retention (Like/Sequential) by Program Summary

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos

package includes all the data elements in the PM Analyze Student Engagement business concept data model.

Business questions

This report answers the following business questions:

- Which campaigns have resulted in more or less impact on retention rates?
- Have specific campaigns improved retention rates for the targeted student population over time?

Campaign Retention by Academic Study Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Retention Period Type *	Select "Like" to filter the report by retention periods for like terms, for example, Fall 2008 to Fall 2009. Select "Sequential" to filter the report by retention periods for sequential terms, for example, Fall 2008 to Spring 2009.	p_Retention Period Type
Retention Period Type (Like or Sequential)*	Select which Retention Period to display in the report. You can select from a list of Like or Sequential periods based on your selection for the Retention Period Type prompt.	p_Retention Period Like or p_Retention Period Sequential
Campaign *	Select which campaign to include in the report.	p_Campaign
Student Level*	Select a student level to specify which level of data to display in the report. Click the Cascade button next to the Student Level prompt to populate the Academic Study prompts.	p_Student Level

Academic Study prompts

The Academic Study prompts are required prompts that you can use to filter the information in the report based on the student's course of study.

Prompt	Description	Parameter
College*	Select one or more colleges to display in the retention by college graph.	p_College
Program*	Select one or more programs to display in the retention by program graph.	p_Program
Major*	Select one or more majors to display in the retention by major graph.	p_Major
Degree*	Select one or more degrees to display in the retention by degree graph.	p_Degree

Campaign Retention by Academic Study Summary - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report you can click on one of the graphed values on any of the graphs to drill through to one of the following related list reports built in Query Studio.

- Campaign Retention (Like/Sequential) by College Summary
- Campaign Retention (Like/Sequential) by Degree Summary
- Campaign Retention (Like/Sequential) by Major Summary
- Campaign Retention (Like/Sequential) by Program Summary

Parameter	Required	Method	Value
Campaign (for both the Like and Sequential reports by Degree, Program, College, and Major)		Pass parameter value	p_Campaign
Student_Level_ Description (for both the Like and Sequential reports by Degree, Program, College, and Major)		Pass parameter value	p_Student Level
Retention_Period_ (Sequential) (for Sequential reports by Degree, Program, College, and Major)		Pass data item value	Retention Period (Sequential)
Retention_Period_ (Like) (for Like reports by Degree, Program, College, and Major)		Pass data item value	Retention Period (Like)
Degree_Description (for both Like and Sequential reports)		Pass data item value	Degree Description
Program_Description		Pass data item value	Program Description
(for both Like and Sequential reports)			
College_Description (for both Like and Sequential reports)		Pass data item value	College Description
Major_Description (for both Like and Sequential reports)		Pass data item value	Major Description

Student Academic Performance and Engagement Detail report

The Student Academic Performance and Engagement Detail report provides curricula information, academic performance, and student engagement statistics such as interactions, activity, and athletic counts for all academic periods that are associated with the students. The students are identified and included in the report based on the academic period and student level selected. You can use the optional filters such as student academic, demographic, activities, and athletics to refine the target student population. Use the Interactions Within Academic Period prompts to filter the interactions to be counted for your target student population. You can drill on the student name to access the Student Engagement Profile report for further analysis at the student level.

Student Academic Performance and Engagement Detail

Fall 2006, Undergraduate

Selected Prompts

	Academic Study			Academic Performance					Academic Period Engagement				
Student Name	Academic Period	Enrollment Status	College	Major	Student Classification	Total Registered Credits	Academic Standing End	Academic Period GPA	Cum Credits Earned	Cum GPA	Interaction Count (*)	Total Activity Count	Total Sport Count
Argo, William M. N00011121	Fall 2007	Data Not Avail	College of Arts & Science	Sport Management	Freshman	0.00	Data Not Avail		0.00	3.000	0	0	0
	Fall 2006	Eligible to Register	College of Arts & Science	Sport Management	Freshman	27.00	Good Standing	3,000	27.00	3.000	0	3	0

	Academic Study				Academic Performance				Academic Period Engagement				
Student Name	Academic Period	Enrollment Status	College	Major	Student Classification	Total Registered Credits	Academic Standing End	Academic Period GPA	Cum Credits Earned	Cum GPA	Interaction Count (*)	Total Activity Count	Total Sport Count
Aumann, Mary N00011287	Fall 2008	Data Not Avail	College of Arts & Science	History	Freshman	0.00	Data Not Avail		0.00	2.000	0	0	0
	Spring 2008	Data Not Avail	College of Arts & Science	History	Freshman	0.00	Data Not Avail		0.00	2.000	0	0	0
	Fall 2006	Eligible to Register	College of Arts & Science	History	Freshman	4.00	Good Standing	2.000	4.00	2.000	0	0	0

Report package

This report was built in Report Studio and is based on data in the business concept. The delivered Cognos package includes all the data elements in the business concept data model.

Business questions

This report answers the following business questions:

- What number and types of interactions or communications are most common to successful students?
- Are at-risk student involved in too many non-academic activities?
- Are there any indications that the level of engagement (or lack thereof) affecting student's academic performance during the course of a student's career?
- What are the contact engagement and retention trends within a program/college/department?

Student Academic Performance and Engagement Detail - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level*	Select a student level to specify which level of data to display in the report. Click the Cascade button next to the Student Level prompt to populate the Academic Study prompts.	p_Student Level

Student Status prompts

The Student Status prompts are optional prompts that you can use to filter the report based on various statuses of a student.

Prompt	Description	Parameter	
Enrolled Ind	Select to filter the report by students who are enrolled or not enrolled.	p_Enrolled Ind	
Registered Ind	Select to filter the report by students who are registered or not registered.	p_Registratio n Ind	

Prompt	Description Paran	
New Student Ind	Select to filter the report by students who are p_N new or not new.	
Withdrawn Student Ind	Select to filter the report by students who have withdrawn or not withdrawn. p_Withd	
Graduated Ind	Select to filter the report by students who have graduated.	p_Graduated Ind
Enrollment Status	Select to filter the report by a student's enrollment status.	p_Enrollment Status
Student Status	Select to filter the report by a student's status.	p_Student Status
Current Time Status	Select to filter the report by a student's current time status.	p_Current Time Status

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study. Click the Cascade button next to the **Student Level** prompt to populate the Academic Study prompts.

Prompt	Description	Parameter
College	Select one or more colleges to display in the report. Click the Cascade button next to the College prompt to populate the Program and Major prompts.	p_College
Program	Select one or more programs to display in the report.	p_Program
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Student Groupings prompts

The Student Groupings prompts are optional prompts that you can use to filter the report based on the student's population, cohort, attribute and/or classification for the selected term and level.

Prompt	Description Paramet		
Student Population	Select one or more student populations to p_S display in the report.		
Student Cohort	ort Select one or more student cohorts to display in p_Student report. Cohort		
	NOTE: Only active cohorts (by academic period) are included in the Analyze Student Engagement business concept.		
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute	
Student Classification	Select one or more student classifications to display in the report.	classifications to p_Student Classification	
Academic Period First Attended	Select an academic period to display only students who first attended the institution in that academic period.	p_Academic Period First Attended	

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned

Prompt	Description	Parameter
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Demographic prompts

These prompts are optional prompts that you can use to filter the report based on certain personal characteristics of a student.

Prompt	Description Parame	
Gender	Select one or more genders to display in the p_Genders.	
Citizenship Type	Select one or more citizenship types to display in the report.	p_Citizenship Type
Race Category	Select one or more race categories to display in the report.	p_Race Category
Veteran Category	Select one or more veteran categories to display in the report.	p_Veteran Category

Student Activities prompts

The Student Activities prompts let you filter the report based on specific activities a student is involved in.

Prompt	Description	Parameter
Activity Category	Select an activity category and click the Cascade button to filter the lists of activity types and activities displayed in the Activity Type and Activity prompts.	p_Activity Category

Prompt	Description	Parameter
Activity Type	Select an activity type and click the Cascade button to filter the lists of activity categories and activities displayed in the Activity Category and Activity prompts.	p_Activity Type
Activity	Select one or more activities to display in the report.	p_Activity Code

Athletics prompts

The Athletics prompts let you filter the report based on the following athletics attributes.

Prompt	Description	Parameter
Sport	Select one or more sports to display in the report.	p_Sport
Sport Status	Select one or more sport statuses to display in the report.	p_Sport_Status
Athletic Academic Eligibility	Select one or more eligibility values to display in the report.	p_Athletic_Acad emic_Eligibility

Interactions within Academic Period prompts

The Interactions within Academic Period prompts let you filter on those interactions to be counted for your target student population.



Note

NOTE: All other (required or optional) prompts on this report filter the student population displayed in the report for the academic period selected.

Prompt	Description	Parameter
Academic Period Interaction Category	Select one or more interaction categories to be counted in the report. Only those interaction categories selected will be counted for the student across all academic periods.	p_Academic Period Interaction Category
Academic Period Interaction Type	Select one or more interaction types to be counted in the report. Only those interaction categories selected will be counted for the student across all academic periods.	p_Academic Period Interaction Type

Prompt	Description Paral	
Academic Period Interaction Org	Select one or more interaction organizations to be counted in the report. Only those interaction organizations selected will be counted for the student across all academic periods.	p_Academic Period Interaction Organization
Academic Period Interaction Source	Select one or more interaction sources to be counted in the report. Only those interaction sources selected will be counted for the student across all academic periods.	p_Academic Period Interaction Source

Student Academic Performance and Engagement Detail - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on some of the values to drill through to the Student Engagement Profile report. The following table specifies the drill-through parameter values for the Student Engagement Profile report. These are the parameter values that need to be passed from the Student Academic Performance and Engagement Detail report to the Student Engagement Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
drill_Person UID		Pass data item value	PERSON_UID
p_Interaction From Date	X	Pass data item value	Academic Period Begin Date
p_Interaction To Date	X	Pass data item value	Academic Period End Date
p_Student Level	X	Pass parameter value	p_Student Level

Student Engagement Profile report

The Student Engagement Profile report provides a full engagement and interaction profile by student level. The report includes an academic summary for the academic period in context, as well as a comprehensive engagement profile including all advisor assignments, activity and athletics participation, and campaign involvement for the student's career. Also, you can specify the date range to be used for which manual interactions the student has had will be included in the report.

Student Engagement Profile

Academic Summary - Fall 2006

Abdul Baki, Nelly	Confid	lential: No		200607710
Enrollment Summary		Demographics		
Current Time Status:	Full Time	Gender:	Female	
Student Status:	Active	Race Category:	Data Not Avail	
Student Classification:	Freshman	Current Age:	24	
Student Population:	New First Time	Citizenship:	Data Not Avail	
Enrolled:	Yes	Veteran Category:	Data Not Avail	
Registered:	Yes	Admissions Summary		
Withdrawn:	No	Academic Period Admit:	Fall 2006	
Residency:	Resident	Admission Population:	Standard	
-		Admit Age:	18	
Academic Study Summary		Financial Aid Status		
Student Level:	Undergraduate	Aid Applicant:	Aid Applicant	
Program:	B.A. History	FM Need Eligible:	Need Eligible	
College:	College of Arts & Science	Aid Offered:	No Aid Offered	
Degree:	Bachelor of Arts	Aid Paid:	No Aid Paid	
Major:	History			
Campus:	Main			
Current Academic Period Curri	cula Summary	Academic Performance Sum	mary	
Academic Standing Begin:	Data Not Avail	Cumulative GPA:	3.443	
Total Registered Credits:	12.00	Cum Credits Earned:	9.00	
Developmental Course Ind:	No Registered Developmental Course	Academic Period GPA:	3.500	
Previous Academic Period GPA:		Academic Standing End:	Data Not Avail	
Student Attributes		Student Cohorts		
Data Not Avail		Data Not Avail		

bdul Baki, Nelly		Confi	dential: No				2000
Advisor Summary							
Advisor Name			emic Period		Academic Period		Primary Advisor Ind
Instructor, Steve	Athletic Dept Advisor		Fall 2006		f Time	Yes	
Test, Test	Azuza Code	Fall 2006		The End o	f Time	No	
Test, Test	OD Advisor	Fall 2006		The End o	f Time	No	
Activity Summary					I		
Activity	Last Academic Period	First Academic Period	Total Acader	nic Periods	Activity Type	:	Activity Category
Ass'n of University Women	Fall 2006	Fall 2006	1 Data Not Avail		Data Not Avail	Data Not Avail	
This student is not invo	lved in any sports.						
Campaign Summary	(Since Academic Period First	Attended: Fall 2006)					
This student has not be	een involved in any campaigns	since the start date of thei	r First Academic	Period.			
	een involved in any campaigns (From Jan 1, 1999 to Feb 15,		r First Academio	Period.			
Manual Interactions		2013)	r First Academio	Period.			

Report package

This report was built in Report Studio and is based on data in the business concept. The delivered Cognos package includes all the data elements in the business concept data model.

Business questions

This report answers the following business questions:

- What number and types of interactions or communications are most common to successful students?
- For at-risk students, what campus student activities are they engaged in?

Student Engagement Profile - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period *	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level *	Select a student level to specify which level of data to display in the report. Click the Cascade button next to the Student Level prompt to populate the Academic Study prompts.	p_Student Level
Manual Interaction Date Range *	Select two dates to define the range of dates to filter interactions by for display in the report.	p_Interaction From Date and p_Interaction To Date

Student prompt

You can filter the report results by specific student names or Student IDs. Use the search feature on the report prompt page to find names or IDs and choose them for inclusion in the report.

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study. Click the Cascade button next to the **Student** Level prompt to populate the Academic Study prompts.

Prompt	Description	Parameter
College	Select one or more colleges to display in the report. Click the Cascade button next to the College prompt to populate the Program and Major prompts.	p_College
Program	Select one or more programs to display in the report.	p_Program
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Student Engagement Profile - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

The Student Engagement Profile report is available as a drill-through report from the Student Academic Performance and Engagement Detail report. Refer to the section describing that report for detailed information about it and the drill-through definitions to this report

Student Interaction by Academic Standing Summary report

The Student Interaction by Academic Standing Summary report lets you analyze the impact of specified manual interactions on student academic performance. The report includes registered and interaction headcounts, percentages, and comparative academic performance measures for students within a college. The data is additionally grouped by major and academic standing. You can run the Student Interaction by Academic Standing Summary report either for begin academic standing view or end academic standing view. You can drill through the registered or interaction headcount to access the Student Interactions by Advisor List Detail report.

Student Interaction by Academic Standing Summary

Fall 2005, Undergraduate

Selected Prompts

Manual Interactions in Context

 Interaction Organization
 ALL

 Interaction Category
 Advising

 Interaction Type
 ALL

Interaction Date Range Between Sep 1, 2005 and Mar 22, 2011

University of Northern BC							
Major by Academic Standing Begin	Registered Headcount	Interaction Headcount	Percent with Interactions	Total Interaction Count	Average Interaction Count	Cum GPA Interaction Headcount	Cum GPA Registered Headcount
Biochemistry							
Good Standing	23	0	0%	0	0	0	3.147
Total	23	0	0%	0	0	0	3.147
Biomedical Engineering							
Good Standing	<u>53</u>	<u>3</u>	6%	3	1.0	3.001	3.213
Total	53	3	6%	3	1.0	3.001	3.213
Chemical Engineering							
Good Standing	<u>36</u>	4	11%	4	1.0	3.145	3.177
Total	36	4	11%	4	1.0	3.145	3.177
Chemistry							
Good Standing	<u>13</u>	<u>3</u>	23%	3	1.0	3.783	3.373
Total	13	3	23%	3	1.0	3.783	3.373
University of Northern BC Summary	125	10	8%	10	1.0	3.293	3.207

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos package includes all the data elements in the PM Analyze Student Engagement business concept data model.

Business questions

This report answers the following business questions:

- In which program/college/department are the students who have not been in contact with their advisor within a specified period of time?
- Does the frequency and quality of interactions with a student have an impact on their academic progress?

Student Interaction by Academic Standing Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level*	Select a student level to specify which level of data to display in the report. Click the Cascade button next to the Student Level prompt to populate the Academic Study prompts.	p_Student Level
Academic Standing (Begin or End) display prompt*	Select an academic standing grouping to be used. You can select either the beginning or the ending academic standing of the student for the academic period in context.	p_Academic Standing Begin or End

Manual Interactions prompts

The Manual Interactions prompts let you filter the report based on category, type, organization, and date of manual interactions with students. An (*) indicates a required value.

Prompt	Description	Parameter
Manual Interaction Category *	Select one or more manual interaction categories to be queried in the report.	p_Manual Interaction Category
Manual Interaction Type	Select one or more manual interaction types to be queried by the report.	p_Manual Interaction Type

Prompt	Description	Parameter
Manual Interaction Org	Select one or more manual interaction organizations to be queried by the report.	p_Manual Interaction Organization
Manual Interaction Date Range *	Select dates to define the range of manual interactions for students to be queried by the report.	p_Manual Interaction From Date Range or p_Manual Interaction To Date Range

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study. Click the Cascade button next to the **Student Level** prompt to populate the Academic Study prompts.

Prompt	Description	Parameter
College	Select one or more colleges to display in the report. Click the Cascade button next to the College prompt to populate the Program and Major prompts.	p_College
Program	Select one or more programs to display in the report.	p_Program
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Student Groupings prompts

The Student Groupings prompts are optional prompts that you can use to filter the report based on the student's population, cohort, attribute and/or classification for the selected term and level.

Prompt	Description	Parameter
Student Population	Select one or more student populations to display in the report.	p_Student Population
Student Cohort	Select one or more student cohorts to display in the report.	p_Student Cohort
	NOTE: Only active cohorts (by academic period) are included in the Analyze Student Engagement business concept.	
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Student Classification	Select one or more student classifications to display in the report.	p_Student Classification
Academic Period First Attended	Select an academic period to display only students who first attended the institution in that academic period.	p_Academic Period First Attended

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Demographic prompts

These prompts are optional prompts that you can use to filter the report based on certain personal characteristics of a student.

Prompt	Description	Parameter
Gender	Select one or more genders to display in the report.	p_Gender
Citizenship Type	Select one or more citizenship types to display in the report.	p_Citizenship Type
Race Category	Select one or more race categories to display in the report.	p_Race Category
Veteran Category	Select one or more veteran categories to display in the report.	p_Veteran Category

Student Interaction by Academic Standing Summary - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on some of the values to drill through to the Student Interactions by Advisor List Detail report. The following table specifies the drill-through parameter values for the Student Interactions by Advisor List Detail report. These are the parameter values that need to be passed from the Student Interaction by Academic Standing Summary report to the Student Interactions by Advisor List Detail report for the drill-through to work properly.

The following table lists all drill through definitions for the Registered Headcount and Interaction Headcount drill-throughs within the report design.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass parameter value	p_Student Level
p_College		Pass data item value	College

Parameter	Required	Method	Value
drill_Academic Standing Begin		Pass parameter value	p_Academic Standing Begin
drill_Academic Standing End		Pass parameter value	p_Academic Standing End
drill_Cumulative GPA Threshold		Pass parameter value	drill_Cumulative GPA Threshold
p_Academic Period First Attended		Pass parameter value	p_Academic Period First Attended
p_Academic Period GPA Range		Pass parameter value	p_Academic Period GPA Range
p_Academic Standing		Pass parameter value	p_Academic Standing End
p_Academic Standing Begin		Pass parameter value	p_Academic Standing Begin
p_Campus		Pass parameter value	p_Campus
p_Citizenship Type		Pass parameter value	p_Citizenship Type
p_Cum GPA Range		Pass parameter value	p_Cum GPA Range
p_Degree		Pass parameter value	p_Degree
p_Gender		Pass parameter value	p_Gender
p_Interactions in Date Range Display	X	Pass data item value	Drill for Interaction Count
p_Major		Pass data item value	Major
p_Manual Interaction Category	X	Pass parameter value	p_Manual Interaction Category
p_Manual Interaction From Date Range	X	Pass parameter value	p_Manual Interaction From Date Range
p_Manual Interaction Organization		Pass parameter value	p_Manual Interaction Organization
p_Manual Interaction To Date Range	X	Pass parameter value	p_Manual Interaction To Date Range

Parameter	Required	Method	Value
p_Manual Interaction Type		Pass parameter value	p_Manual Interaction Type
p_Primary Advisor Ind		Pass data item value	Primary Advisor Indicator Yes
p_Program		Pass parameter value	p_Program
p_Race Category		Pass parameter value	p_Race Category
p_Registration Ind		Pass data item value	Registered Indicator Yes
p_Student Attribute		Pass parameter value	p_Student Attribute
p_Student Classification		Pass parameter value	p_Student Classification
p_Student Cohort		Pass parameter value	p_Student Cohort
p_Student Population		Pass parameter value	p_Student Population
p_Total Credits Earned		Pass parameter value	p_Total Credits Earned
p_Veteran Category		Pass parameter value	p_Veteran Category

Student Interactions by Advisor List Detail report

The Student Interactions by Advisor List Detail report provides a list of all students who have had (or not had) a specified form of manual interaction within a designated timeframe. This report includes student curricula, academic performance measures, and details related to the student's latest interaction. The data is grouped by advisor name and advisor type in the report. The report also indicates the primary advisor assignments for

each student. You can also drill through on the student name to access the Student Engagement Profile report.

Selected Prompts					Student		tions by all 1991, Gra		List De	tail		
anual Interactions teraction Organizatio teraction Category teraction Type teraction Date Range splay for Interaction dvisor: Eaton, Augus	on e Date Range	Ca Un Bet	ntorship mpus Visit, E- specified	mail Sent To, I 1999 and Feb Its		Mail Sent, Př	none Call Plac	ed, Phone Ca	ill Received,			
Name	Interaction Count	Enrollment Status	College	Major	Student Classification	Academic Standing Begin	Total Registered Credits	Cum GPA	Latest Interaction Date	Latest Interaction Category	Latest Interaction Type	Latest Interaction Subject
Advisor Type: Data	Not Avail											
Elway, Dexter X. A 19800528 (Primary)	0	Enrolled	College of Engineering	To Be Declared	Graduate Level	Good Standing	3.00	2.819	No Interaction			
Hirani, Alisar I. A 19870059 (Primary)	0	Enrolled	Georgia Southern	Electrical Engineering	Graduate Level	Good Standing	3.00	3.215	March 31, 2009	Letter2	E-mail Sent To	Counselor Visit
dvisor: Lucchesi, Ha	nnibal N.	,										
Name	Interaction Count	Enrollment Status	College	Major	Student Classification	Academic Standing Begin	Total Registered Credits	Cum GPA	Latest Interaction Date	Latest Interaction Category	Latest Interaction Type	Latest Interaction Subject
Advisor Type: Data	Not Avail											
Blattner, Leo O. A 19840081 (Primary)	1	Enrolled	College of Engineering	To Be Declared	Graduate Level	Data Not Avail	3.00	3.025	August 10, 2010	Mentorship	E-mail Sent To	Program Planning Email
Haydar, Josh S. A 19870 179 (Primary)	0	Enrolled	College of Education	Civil Engineering	Graduate Level	Good Standing	3.00	3.035	No Interaction			
Marriott, Goran R. A 19870284 (Primary)	0	Enrolled	College of Education	Manufacturing Engineering	Graduate Level	Good Standing	3.00	3.006	No Interaction			

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos package includes all the data elements in the PM Analyze Student Engagement business concept data model.

Business questions

This report answers the following business questions:

- In which program/college/department are the students who have not been in contact with their advisor within a specified period of time?
- Which students have not had an advisement interaction with their advisor in the last 45 days?

Student Interactions by Advisor List Detail - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period *	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level *	Select a student level to specify which level of data to display in the report. Click the Cascade button next to the Student Level prompt to populate the Academic Study prompts.	p_Student Level

Manual Interactions prompts

The Manual Interactions prompts let you filter the report based on category, type, organization, and date of manual interactions with students. An (*) indicates a required value.

Prompt	Description	Parameter
Manual Interaction Category*	Select one or more manual interaction categories to be queried in the report.	p_Manual Interaction Category
Manual Interaction Type	Select one or more manual interaction types to be queried by the report.	p_Manual Interaction Type
Manual Interaction Org	Select one or more manual interaction organizations to display in the report.	p_Manual Interaction Organization
Manual Interaction Date Range *	Select dates to define the range of manual interactions with students to display in the report.	p_Manual Interaction From Date Range or p_Manual Interaction To Date Range
Display for Interaction Date Range	Choose which population of students for the selected date range of manual interactions to display in the report.	p_Interaction s in Date Range Display

Student Status prompts

The Student Status prompts are optional prompts that you can use to filter the report based on various statuses of a student.

Prompt	Description	Parameter
Enrolled Ind	Select to filter the report by students who are enrolled or not enrolled.	p_Enrolled Ind
Registered Ind	Select to filter the report by students who are registered or not registered.	p_Registratio n Ind
New Student Ind	Select to filter the report by students who are new or not new.	p_New Student Ind
Withdrawn Student Ind	Select to filter the report by students who have withdrawn or not withdrawn.	p_Withdrawn Ind
Graduated Ind	Select to filter the report by students who have graduated.	p_Graduated Ind
Enrollment Status	Select to filter the report by a student's enrollment status.	p_Enrollment Status
Student Status	Select to filter the report by a student's status.	p_Student Status
Current Time Status	Select to filter the report by a student's current time status.	p_Current Time Status

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study. Click the Cascade button next to the **Student Level** prompt to populate the Academic Study prompts.

Prompt	Description	Parameter
College	Select one or more colleges to display in the report. Click the Cascade button next to the College prompt to populate the Program and Major prompts.	p_College
Program	Select one or more programs to display in the report.	p_Program

Prompt	Description	Parameter
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Advisor prompts

Use the Advisor prompts to define which advisors to include in the report.

Prompt	Description	Parameter
Primary Advisor Ind	Select to filter the report by Primary Advisor Ind.	p_Primary Advisor Ind
Advisor Type	Select one or more Advisor type to display in the report.	p_Advisor Type
Advisor Name	Use the Search feature to find and select one or more Advisor Names to display in the report.	p_Advisor Name

Student Groupings prompts

The Student Groupings prompts are optional prompts that you can use to filter the report based on the student's population, cohort, attribute and/or classification for the selected term and level.

Prompt	Description	Parameter
Student Population	Select one or more student populations to display in the report.	p_Student Population
Student Cohort	Select one or more student cohorts to display in the report.	p_Student Cohort
	Note: NOTE: Only active cohorts (by academic period) are included in the Analyze Student Engagement business concept.	
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute

Prompt	Description	Parameter
Student Classification	Select one or more student classifications to display in the report.	p_Student Classification
Academic Period First Attended	Select an academic period to display only students who first attended the institution in that academic period.	p_Academic Period First Attended

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Demographic prompts

These prompts are optional prompts that you can use to filter the report based on certain personal characteristics of a student.

Prompt	Description	Parameter
Gender	Select one or more genders to display in the report.	p_Gender
Citizenship Type	Select one or more citizenship types to display in the report.	p_Citizenship Type
Race Category	Select one or more race categories to display in the report.	p_Race Category
Veteran Category	Select one or more veteran categories to display in the report.	p_Veteran Category

Student Interactions by Advisor List Detail - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on some of the values to drill through to the Student Engagement Profile report. The following table specifies the drill-through parameter values for the Student Interactions by Advisor List Detail report. These are the parameter values that need to be passed from the Student Interactions by Advisor List Detail report to the Student Engagement Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
drill_Person UID		Pass data item value	PERSON UID
p_Interaction From Date	X	Pass parameter value	p_Manual Interaction From Date Range
p_Interaction To Date	X	Pass parameter value	p_Manual Interaction To Date Range
p_Student Level	X	Pass parameter value	p_Student Level

Analyze Student Progress reports

The reports based on the PM Analyze Student Progress package enable you to measure student retention, performance and progress at your institution. The PM Analyze Student Progress package includes information on student retention from one academic period to another, academic performance, student course details, and academic outcome sought or awarded during a student's enrollment in an academic period.

The following Report Studio reports are delivered in the **Student Retention Performance** > **Reports** > **Analyze Student Progress** folder under the **Public Folders** tab:

- Academic Qualifications Impact on Retention to Graduation Comparison Trend
- Graduation Multi-Year Rate by Academic Study Summary
- · Master Student Enrollment Trend
- Retention Multi-Year Rate by Academic Study Summary
- Retention Period Rate by Student Group Summary
- Student by Advisor Detail
- Student by Advisor Faculty Feedback Detail
- Student Course Performance by Course Trend
- Student Course Section Performance by Faculty Feedback Detail
- Student Course Section Performance by Faculty Feedback Summary
- Student Course Section Performance by Student Characteristic Summary
- Student Course Section Performance by Student Detail
- Student Full Profile
- Student Full Profile by Faculty Feedback
- Student List Detail
- Student List Faculty Feedback Detail

The following Query Studio reports are also delivered with this product and based on the PM Analyze Student Progress package:

- · Advisee Feedback by Advisor Summary
- Athletic Team Faculty Feedback Detail
- Course Planning by Estimated Grade Threshold Summary
- Course Section Instructor Count by Course Dept Trend
- Estimated Grade Final Grade Comparison by Course Summary

- Estimated Grade Final Grade Comparison by Instructor Summary
- Estimated Grade Final Grade Comparison by Student Summary
- Estimated Grade Dropped Course Evaluation Summary
- Faculty Feedback Session by Course Department Summary
- Faculty Feedback Session by Course Summary
- Faculty Feedback Students Fall to Fall Retention by Diversity Trend
- Graduation Multi-Year Rate by Academic Study Summary (Four reports; one for each of the following academic study categories: Outcome College, Outcome Degree, Outcome Major, and Outcome Program)
- Instructional Method Assessment by Faculty Feedback Trend
- Instructor Course Load by Course Dept Trend
- Monitored Student Course Load Comparison by Student Attributes

- Monitored Student Course Load Comparison Detail
- Monitored Student Ratio by Course Trend
- Retention Multi-Year Rate by Academic Study Summary (Four reports; one for each of the following academic study categories: College, Degree, Major, and Program)
- Retention Period Rate (Like/Sequential) by Student Group Summary (Eight reports; "Like" and "Sequential" versions for each of the following student groups: Attribute, Classification, Cohort, and Population)
- Student Athlete Faculty Feedback Summary
- Student Faculty Feedback Detail

Academic Qualifications Impact on Retention to Graduation Trend report

The Academic Qualifications Impact on Retention to Graduation Trend report is a three year trend report that allows you to compare a full population to a subset of that population based on the first academic period attended. This report illustrates the potential impact of a student's academic qualifications at the time of admission on retention to the second year and to graduation on time. The academic qualifications, attributes and prompt filters in this report are as of the student's first term attended.

The report includes Academic Qualifications and Gender Race Category sections for the following populations:

- Baseline Population
- 2 Year Retention
- 4 Year Student Graduation
- 5 Year Student Graduation
- 6 Year Student Graduation

The following picture illustrates the report. Not all pages of the report are shown in this sample.

Academic Qualifications Impact on Retention to Graduation Trend

Undergraduate

POPULATION							COMPARISON POPULATION: See Selected Prompts	ected Prompt	so.				
		ACADEMIC		PERIOD FIRST ATTENDED	ENDED					ACADEMIC PERIOD FIRST ATTENDED	FIRST ATT	ENDED	
	Fall	Fall 2005	Fall 2004	5004	Fall	Fall 2003		Fall 2005	500	Fall 2004	9004	Fall 2003	003
EMIC QUALIFICATIONS	Total Regis Head	Total Initial Registered Headcount	Total Initial Registered Headcount	rotal Initial Registered Headcount	Total Regis Head	Total Initial Registered Headcount	ACADEMIC QUALIFICATIONS	Total Initial Registered Headcount	nitial ered ount	Total Initial Registered Headcount	initial ered count	Total Initial Registered Headcount	nitial ered ount
)XI	303	418	9	77	128		303		418	mı	128	mı
	Initial Registered Headcount	% Total	Initial Registered Headcount	% Total	Initial Registered Headcount	% Total		Initial Registered Headcount	% Total	Initial Registered Headcount	% Total	Initial Registered Headcount	% Total
posite 16 - 20	2	9699'0	ını	1.20%	1	0.78%	ACT Composite 16 - 20	2	0.66%	ını	1.20%	1	0.78%
posite 21 - 25	9	19,80%	81	22.97%	37	28.91%	ACT Composite 21 - 25	9	19.80%	81	22.97%	37	28,919
posite 26 - 30	123	40.59%	166	39.71%	81	37.50%	ACT Composite 26 - 30	123	40.59%	166	39.71%	81	37.50%
posite > 30	23	9.57%	38	6.70%	2	1.56%	ACT Composite > 30	53	9,57%	38	6.70%	2	1.56%
School Percentile Range .00			41	0.96%			Secondary School Percentile Range 50.01 - 75.00			41	9696'0		
School Percentile Range 0.00	140	46.20%	339	81.10%	117	91,41%	Secondary School Percentile Range 75.01 - 100.00	140	46.20%	339	81.10%	117	91.41%
' School Percentile Range A vail	163	53.80%	72	17.94%	II	8,59%	Secondary School Percentile Range Data Not Avail	163	53.80%	72	17.94%	#	8.59%
r School GPA Range 1 - 1.99	12	3,96%	14	3,35%	7	5.47%	Secondary School GPA Range 1 - 1.99	12	3,96%	41	3,35%	7	5,47%
r School GPA Range 2 - 2.99	8	21,45%	176	42.11%	52	40.62%	Secondary School GPA Range 2 - 2.99	581	21,45%	176	42.11%	[2]	40.62%
school GPA Range 3 - 3.99	59	21,45%	151	36.12%	35	43.75%	Secondary School GPA Range 3 - 3,99	59	21.45%	151	36.12%	絽	43.75%
r School GPA Range > 4					2	1.56%	Secondary School GPA Range > 4					2	1.56%
' School GPA Range Data Not	161	53.14%	77	18,42%	П	8,59%	Secondary School GPA Range Data Not Avail	161	53.14%	77	18,42%	#1	8.59%
		ACADEMIC	I 🕰	ERIOD FIRST ATTENDED	ENDED				ACADE	ACADEMIC PERIOD FIRST ATTENDED	FIRST ATT	ENDED	
	Fall	Fall 2005	Fall 2004	5004	Fall	Fall 2003		Fall 2005	500	Fall 2004	9004	Fall 2003	003
GENDER RACE CATEGORY	Total Regis Head	Total Initial Registered Headcount	Total Initia Registered Headcount	rotal Initial Registered Headcount	Total Regis Head	Total Initial Registered Headcount	GENDER RACE CATEGORY	Total Initial Registered Headcount	nitial ered ount	Total Initial Registered Headcount	Initial ered count	Total Initial Registered Headcount	nitial ered ount
	36	303	418	9	77	128		303		418	mı	128	mı
	Initial Registered Headcount	% of Total	Initial Registered Headcount	% of Total	Initial Registered Headcount	% of Total		Initial Registered Headcount	% of Total	Initial Registered Headcount	% of Total	Initial Registered Headcount	% of Tota
Avail	12	3,96%	읾	21.53%	위	30.47%	Data Not Avail	12	3.96%	ଣ	21.53%	위	30.47%
	140	46.20%	157	37,56%	05	39,06%	Female	140	46.20%	157	37,56%	8	39,06%
	147	48.51%	161	38.52%	8	29.69%	Male	147	48.51%	161	38.52%	R	29,69%
Pa	41	1,32%	01	2.39%	1	0.78%	Not Reported	41	1.32%	웨	2,39%	T	0.78%
Indian or Alaska Native	-	0.33%					American Indian or Alaska Native		0.33%				
	=1	0,33%					Asian	-1	0.33%				
frican	=	0,33%					Black or African	-1	0.33%				
Avail	301	99,34%	418	100.00%	128	100.00%	Data Not Avail	301	99.34%	418	100.00%	128	100,009

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following business questions:

- What is the relationship between students' academic qualifications and retention to second year?
- How do college retention, and completion rates vary among groups of students?
- Are students academically prepared to enter college and complete their program or degree in a timely manner?

Academic Qualifications Impact on Retention to Graduation Trend - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter			
Academic Period First Attended	Select the Academic Period First Attended to specify which period of data to display in the report.	p_Academic Period First Attended			
Student Level	Select a student level to specify which level of data to display in the report.	p_Student Level			
Student Groupings Category	Select a Student Groupings Category to define which category of information to include in the report.	p_student_gr ouping			
	One of the following prompts will display based on your selection for the Student Groupings Category prompt.				
Student Attribute	Select one or more Student Attributes to filter the base population to be included in the report.	p_Student Attribute			

Prompt	Description	Parameter
Student Classification	Select one or more Student Classification s to filter the base population to be included in the report.	p_Student Classification
Student Cohort	Select one or more Student Cohort s to filter the base population to be included in the report.	p_Student Cohort
Student Population	Select one or more Student Population s to filter the base population to be included in the report.	p_Student Population

Academic Qualification prompts

The Academic Qualification prompts are required prompts that define which academic qualifications will be displayed in the report. These prompts are required indicated by an asterisk (*).

Prompt	Description	Parameter
Prior Education *	Choose which prior education value to filter the report by.	p_Prior Education
	NOTE: Secondary School Academic Qualifications will be Secondary School GPA Range and Secondary School Percentile Range. Latest Post Secondary School Academic Qualifications will include Latest Post Secondary School GPA Range and Latest Post Secondary School Transfer Credits Range.	
Test (Highest) *	Select the test to display the highest test score range for that test in the report.	p_Test

Comparison Population (Subset of Base Population) prompts

The Comparison Population (Subset of Base Population) prompts allow you to specify whether to include a subset population in the report for comparison purposes.

Prompt	Description	Parameter
Show Comparison Population	Choose the Show Comparison Population radio button to specify that you want to include a comparison (subset of base) population in the report.	Show_Compa rison
Comparison Population *	Select the Comparison Population to include in the report. Based on your selection for this parameter	p_Compariso n_Population

One of the following prompt groups will display based on your selection for the **Comparison Population** prompt.

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the comparison population within this report based on the students' course of study. These prompts display when you select a value of **Academic Study** for the **Comparison Population** prompt.

Prompt	Description	Parameter
Academic Study	Choose which academic study attribute to filter the comparison population by.	p_Academic_ Study_Promp t
One of the followin Study prompt.	g prompts will display based on your selection for	the Academic
Program	Select one or more programs to display in the report.	p_Academic_ Program
College	Select one or more colleges to display in the report.	p_Academic_ College
Major	Select one or more majors to display in the report.	p_Academic_ Major
Degree	Select one or more degrees to display in the report.	p_Academic_ Degree
Campus	Select one or more campuses to display in the report.	p_Academic_ Campus

Financial Aid prompts

The Financial Aid prompts are optional prompts that you can use to filter the comparison population within this report based on a student's financial aid statuses. These prompts display when you select a value of **Financial Aid** for the **Comparison Population** prompt.

Prompt	Description	Parameter
Financial Aid	Choose one or a combination of the Financial Aid indicators to filter the comparison population by.	There is no parameter available for this prompt. Once Financial Aid is selected, it will display only the indicator prompts.
One of the following	ng prompts will display based on your selection f	or the prompt.
Aid Applicant Ind	Select to filter the report based on a student's aid applicant status.	p_Aid_Appli cant_Ind
FM Need Eligible Ind	Select to filter the report based on whether a student is eligible or ineligible for need.	p_FM_Need_ Eligible_Ind
FM Fully Met Need Ind	Select to filter the report based on whether or not a student's financial aid need is fully met.	p_FM_Fully_ Meet_Need_I nd
Financial Aid Offered Ind	Select to filter the report based on whether or not a student was offered financial.	p_Financial_ Aid_Offered_ Ind
Financial Aid Paid Ind	Select to filter the report based on whether or not a student was paid financial aid.	p_Financial_ Aid_Paid_Ind

Post Secondary School (Latest) prompts

The Post Secondary School (Latest) prompts are optional prompts that you can use to filter the report based on the location and name of the latest post secondary school a student attended. These prompts display when you select a value of **Post Secondary School** (**Latest**) for the **Comparison Population** prompt.

Prompt	Description	Parameter
Post Secondary School Nation	Select one or more nations to filter the comparison population by.	p_Post_Secon dary_School_ Nation
Post Secondary School State	Select one or more states to filter the comparison population by. Click the Cascade button next to the Post Secondary School Nation field to populate associated values in the Post Secondary School State field.	p_Post_Secon dary_School_ State
Post Secondary School County	Select one or more counties to filter the comparison population by. Click the Cascade button next to the Post Secondary School State field to populate associated values in the Post Secondary School County field.	p_Post_Secon dary_School_ County
Post Secondary School City	Select one or more cities to filter the comparison population by. Click the Cascade button next to the Post Secondary School County field to populate associated values in the Post Secondary School City field.	p_Post_Secon dary_School_ City
Post Secondary School Name	Select one or more school names to filter the comparison population by. Click the Cascade button next to the Post Secondary School City field to filter the associated values in the Post Secondary School Name field.	p_Post_Secon dary_School_ Name

Secondary School prompts

The Secondary School prompts are optional prompts that you can use to filter the report based on the location and name of the secondary school a student attended. These prompts display when you select a value of Secondary School for the Comparison Population prompt.

Prompt	Description	Parameter
Secondary School Nation	Select one or more secondary school nations to filter the comparison population by.	p_Secondary _School_Nati on
Secondary School State	Select one or more secondary school states to filter the comparison population by. Click the Cascade button next to the Secondary School Nation field to populate associated values in the Secondary School State field.	p_Secondary _School_Stat e
Secondary School County	Select one or more secondary school counties to filter the comparison population by. Click the Cascade button next to the Secondary School State field to populate associated values in the Secondary School County field.	p_Secondary _School_Cou nty
Secondary School City	Select one or more secondary school cities to filter the comparison population by. Click the Cascade button next to the Secondary School County field to populate associated values in the Secondary School City field.	p_Secondary _School_City
Secondary School Name	Select one or more secondary school names to filter the comparison population by. Click the Cascade button next to the Secondary School City field to further filter the associated values in the Secondary School Name field by City.	p_Secondary _School_Na me

Student Geographic prompts

The Student Geographic prompts are optional prompts that you can use to filter the report based on a student's geographic location. These prompts display when you select a value of **Student Geographic** for the **Comparison Population** prompt.

Prompt	Description	Parameter
Student Nation	Select one or more secondary school nations to filter the comparison population by.	p_Student_Na tion
Student State	Select one or more secondary school states to filter the comparison population by.	p_Student_St ate
	Click the Cascade button next to the Secondary School Nation field to populate associated values in the Secondary School State field.	
Student County	Select one or more secondary school counties to filter the comparison population by.	p_Student_ County
	Click the Cascade button next to the Secondary School State field to populate associated values in the Secondary School County field.	
Student City	Select one or more secondary school cities to filter the comparison population by.	p_Student_ City
	Click the Cascade button next to the Secondary School County field to further filter the associated values in the Secondary School City field. by County.	

Academic Qualifications Impact on Retention to Graduation Trend - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on any of the headcount fields within a cross-tab to drill through to the Student List Detail report. The following table specifies the drill-through parameter values for the Student List Detail report. These are the parameter values that need to be passed from the Academic Qualifications Impact on Retention to Graduation Trend report to the Student List Detail report for the drill-through to work properly.

This report uses Cognos conditional blocks functionality to display different versions of the report based on which prompt and/or group values you select. To learn more about the conditional blocks functionality and understand their behavior, refer to Cognos documentation. The drill-through definitions are unique for each conditional block. The following table lists all drill through definitions for the multiple conditional blocks within the report design.

Parameter	Required	Method	Value
p_Academic Period	X	Pass data item value	Academic Period First Attended
drill_2Year_Retention _Cout		Pass data item value	Retention-Graduation Ind
drill_4Year_Graduati on_HC		Pass data item value	Retention-Graduation Ind
drill_5Year_Graduati on_HC		Pass data item value	Retention-Graduation Ind
drill_6Year_Graduati on_HC		Pass data item value	Retention-Graduation Ind
drill_Highest Score Ind		Pass data item value	Registered Ind
drill_Initial Registered Headcount		Pass data item value	Retention-Graduation Ind
drill_Post Secondary GPA Range Description		Pass data item value	Post Secondary GPA Range Description1
drill_Test Description		Pass data item value	Test Description
drill_Test Score Range Description		Pass data item value	Test Score Range Description1
p_Academic Period First Attended		Pass data item value	Academic Period First Attended
p_Student Attribute		Pass parameter value	p_Student Attribute
p_Student Classification		Pass parameter value	p_Student Classification
p_Student Cohort		Pass parameter value	p_Student Cohort
p_Student Level		Pass parameter value	p_Student Level
p_Student Population		Pass parameter value	p_Student Population

Parameter	Required	Method	Value
p_Gender		Pass data item value	Gender
p_Race Category		Pass data item value	Race Category
drill_Secondary Percentile Range Description		Pass data item value	Secondary Percentile Range Description1
drill_Secondary GPA Range Description		Pass data item value	Secondary GPA Range Description1
drill_Post Secondary Transfer Credit Range Description		Pass data item value	Post Secondary Transfer Credit Range Description1
drill_Post Secondary City		Pass parameter value	p_Post_Secondary_ School_City
drill_Post Secondary County		Pass parameter value	p_Post_Secondary_ School_County
drill_Post Secondary School Name		Pass parameter value	p_Post_Secondary_ School_Name
drill_Post Secondary School Nation		Pass parameter value	p_Post_Secondary_ School_Nation
drill_Post Secondary School State		Pass parameter value	p_Post_Secondary_S chool_State
drill_Secondary School City		Pass parameter value	p_Secondary_School _City
drill_Secondary School County		Pass parameter value	p_Secondary_School _County
drill_Secondary School Name		Pass parameter value	p_Secondary_School _Name
drill_Secondary School Nation		Pass parameter value	p_Secondary_School _Nation
drill_Secondary School State		Pass parameter value	p_Secondary_School _State
drill_Student City		Pass parameter value	p_Student_City
drill_Student County		Pass parameter value	p_Student_County

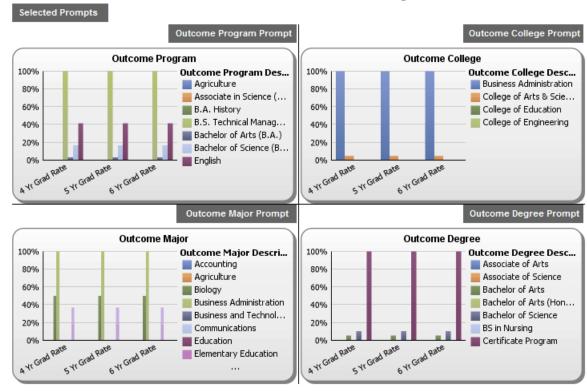
Parameter	Required	Method	Value
drill_Student Nation		Pass parameter value	p_Student_Nation
drill_Student State		Pass parameter value	p_Student_State
p_Aid Applicant Ind		Pass parameter value	p_Aid_Applicant_Ind
p_Campus		Pass parameter value	p_Academic_ Campus
p_College		Pass parameter value	p_Academic_College
p_Degree		Pass parameter value	p_Academic_Degree
p_FM Fully Met Need Ind		Pass parameter value	p_FM_Fully_Met_ Need_Ind
p_FM Need Eligible Ind		Pass parameter value	p_FM_Need_Eligible _Ind
p_Financial Aid Offered Ind		Pass parameter value	p_Financial_Aid_ Offered_Ind
p_Financial Aid Paid Ind		Pass parameter value	pFinancial_Aid_ Paid_Ind
p_Major		Pass parameter value	p_Academic_Major
p_Program		Pass parameter value	p_Academic_ Program

Graduation Multi-Year Rate by Academic Study Summary report

The Graduation Multi-Year Rate by Academic Study Summary report provides a comprehensive look at two to eight year graduation rates by the following outcome academic study categories: outcome program, outcome college, outcome major, and outcome degree.

Graduation Multi-Year Rate by Academic Study Summary

Academic Period First Attended: Fall 2006, Undergraduate



This report displays a set of four graphs, one for each academic study category. Each of the four graphs drills to a report built in Query Studio that you can expand to see student level detail or rerun independently to see summarized level tabular data for each academic study category. Following are the four Query Studio reports used by the master report:

- Graduation Multi-Year Rate by Outcome Program Summary
- Graduation Multi-Year Rate by Outcome College Summary
- Graduation Multi-Year Rate by Outcome Major Summary
- Graduation Multi-Year Rate by Outcome Degree Summary

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers questions around which programs are doing the best job of graduating students on time.

Graduation Multi-Year Rate by Academic Study Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period First Attended*	Select the Academic Period First Attended to specify which period of data to display in the report.	p_Acad Period First Attend Prompt
Outcome Student Level*	Select an Outcome Student Level to specify which level of data to display in the report.	p_Outcome Student Level Prompt
Multi-Year Graduation Rate*	Select one or more Multi-Year Graduation Rate values to display in the report.	p_Graduation Rate Prompt

Academic Study Outcome prompts

The Academic Study Outcome prompts are required prompts that define which academic study outcome values to include in each of the graphs of the report for the selected **Academic Period First Attended** and **Outcome Student Level**. Select values for these prompts then click the Cascade button to populate the Academic Study Outcome prompts.

The report page displays a graph for each of the four academic study outcome categories based on the values you select for the Academic Study Outcome prompts. After you run the report, you can change the values selected for any of the Academic Study Outcome prompts and rerun that graph of the report. To do this, select the appropriate **Outcome** (**Academic Study**) **Prompt** heading on the report, change the selected prompt values, and click **Submit**.

Prompt	Description	Parameter
Outcome Program*	Select one or more Outcome Program values to display in the report.	p_Outcome Program Prompt
Outcome College*	Select one or more Outcome College values to display in the report.	p_Outcome College Prompt
Outcome Major*	Select one or more Outcome Major values to display in the report.	p_Outcome Major Prompt
Outcome Degree*	Select one or more Outcome Degree values to display in the report.	p_Outcome Degree Prompt

Graduation Multi-Year Rate by Academic Study Summary report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report you can click on one of the graphed values on any of the graphs to drill through to one of the following related list reports built in Query Studio.

- Graduation Multi-Year Rate by Outcome Program Summary
- Graduation Multi-Year Rate by Outcome College Summary
- Graduation Multi-Year Rate by Outcome Major Summary
- Graduation Multi-Year Rate by Outcome Degree Summary

The following table specifies the drill-through parameter values for the Query Studio list reports. These are the parameter values that need to be passed from the Graduation Multi-Year Rate by Academic Study Summary report to the associated Query Studio report for the drill-through to work properly.

Parameter	Required	Method	Value
Academic_Period_ First_Attended_ Description (Major and Degree)		Pass parameter value	p_Acad Period First Attend Prompt
Academic_Period_ First_Attended_ Description2 (Program and College)		Pass parameter value	p_Acad Period First Attend Prompt
Outcome_Student_ Level_Description		Pass parameter value	p_Outcome Student Level Prompt
Outcome_Program_ Description		Pass data item value	Outcome Program Description
Outcome_College_ Description		Pass data item value	Outcome College Description
Outcome_Major_ Description		Pass data item value	Outcome Major Description
Outcome_Degree_ Description		Pass data item value	Outcome Degree Description

Master Student Enrollment Trend report

The Master Student Enrollment Trend report is a three year trend report that segments enrollment by multiple student and academic study attributes and illustrates the year to year change in enrollment patterns. Also, it calculates the FTE based on the student level selected in the prompt and the FTE divisor entered on the prompt page.

This report allows you to choose what information will display based on your selection for the Report Display Selection prompt - Student Characteristics, Demographic, or Academic Study. Within the selected section, you can view the following sub-sections of information in the report:

- Student Characteristics Registered Student Headcount and Registered Headcount by Student Population, Student Classification, Current Time Status, and Student Cohort
- Demographic Registered Student Headcount and Registered Headcount by Gender, Race Category, Citizenship Type, Veteran Category, Financial Aid Offered, and Residency Indicator

 Academic Study - Registered Student Headcount and Registered Headcount by Campus, College, Program, Degree, and Major

The following picture illustrates the report for the Student Characteristics data. Not all pages of the report are shown in this sample.

Master Student Enrollment Trend

Undergraduate, FTE Divisor: 12

Selected Prompts

					5	tudent Hea	dcount			
			Fall 2004	1		Fall 200	3	Fall 2002		
		Total Student Headcount			Total Student Headcount			Total Student Headcount		
		784			306			161		
REGISTERED	3 Year Change	Student Headcount	% of Total	1 Year Change in Headcount	Student Headcount	% of Total	1 Year Change in Headcount	Student Headcount	% of Total	1 Year Change in Headcount
No	345.59%	303	38.65%	108.97%	<u>145</u>	47.39%	113.24%	<u>68</u>	42.24%	-13.92%
Yes	417.20%	<u>481</u>	61.35%	198.76%	<u>161</u>	52.61%	73.12%	<u>93</u>	57.76%	165.71%
Total	386.96%	784	100.00%	156.21%	306	100.00%	90.06%	161	100.00%	41.23%

						Registered	Headcount l	by Student Po	pulation				
			Fall 2	004			Fall 2	003			Fall 2	002	
		Total Registered Headcount			Tot	al Register	ed Headcount		Tot	Total Registered Headcount			
			48	1			16	1			93	}	
STUDENT POPULATION	3 Year Change	Registered Headcount	% of Total	1 Year Change in Headcount	FTE	Registered Headcount	% of Total	1 Year Change in Headcount	FTE	Registered Headcount	% of Total	1 Year Change in Headcount	FTE
Continuing	81.82%	<u>40</u>	8.32%	135.29%	39.83	<u>17</u>	10.56%	-22.73%	17.58	22	23.66%	340.00%	30.75
Mature		1	0.21%		0.25	0	0.00%		0.00	0	0.00%		0.00
New First Time	541.18%	<u>436</u>	90.64%	211.43%	368.69	<u>140</u>	86.96%	105.88%	127.92	<u>68</u>	73.12%	142.86%	68.83
Returning	100.00%	2	0.42%	0.00%	2.17	2	1.24%	100.00%	1.50	1	1.08%	0.00%	2.75
Transfer	-50.00%	1	0.21%	-50.00%	0.83	2	1.24%	0.00%	3.58	2	2.15%	100.00%	1.00
Undeclared		1	0.21%		1.00	0	0.00%		0.00	0	0.00%		0.00
Total	417.20%	481	100.00%	198.76%	412.77	161	100.00%	73.12%	150.58	93	100.00%	165.71%	103.33

					ı	Registered H	Registered Headcount by Student Classification						
		Fall 2004					Fall 2	003		Fall 2002			
		Tota	al Registere	ed Headcount		Tot	al Register	ed Headcount		Tot	al Register	ed Headcount	:
			48	1			16	1			93	3	
STUDENT CLASSIFICATION	3 Year Change	Registered Headcount	% of Total	1 Year Change in Headcount	FTE	Registered Headcount	% of Total	1 Year Change in Headcount	FTE	Registered Headcount	% of Total	1 Year Change in Headcount	FTE
Freshman	424.71%	<u>446</u>	92.72%	218.57%	366.44	<u>140</u>	86.96%	64.71%	127.50	<u>85</u>	91.40%	193.10%	87.83
Junior	450.00%	<u>11</u>	2.29%	175.00%	17.58	4	2.48%	100.00%	5.17	<u>2</u>	2.15%	100.00%	4.92
Senior	0.00%	2	0.42%	0.00%	2.42	2	1.24%	0.00%	1.50	2	2.15%	100.00%	2.33
Sophomore	450.00%	<u>22</u>	4.57%	46.67%	26.33	<u>15</u>	9.32%	275.00%	16.42	4	4.30%	0.00%	8.25
Total	417.20%	481	100.00%	198.76%	412.77	161	100.00%	73.12%	150.58	93	100.00%	165.71%	103.33

						Registered Headcount by Current Time Status							
			Fall 2	004			Fall 2	003			Fall 2	002	
		Tot	al Register	ed Headcount		Tot	al Register	ed Headcount		Tot	al Register	ed Headcount	
			48	1			16	1			93	3	
CURRENT TIME STATUS	3 Year Change	Registered Headcount	% of Total	1 Year Change in Headcount	FTE	Registered Headcount	% of Total	1 Year Change in Headcount	FTE	Registered Headcount	% of Total	1 Year Change in Headcount	FTE
3/4 Time	-100.00%	0	0.00%		0.00	0	0.00%	-100.00%	0.00	4	4.30%		3.25
Full Time	216.22%	<u>234</u>	48.65%	118.69%	274.67	<u>107</u>	66.46%	44.59%	123.92	<u>74</u>	79.57%	155.17%	95.50
Half Time	2,725.00%	<u>113</u>	23.49%	438.10%	77.67	<u>21</u>	13.04%	425.00%	14.58	4	4.30%	100.00%	2.83
Less Than Half Time	1,100.00%	<u>120</u>	24.95%	328.57%	32.69	<u>28</u>	17.39%	180.00%	7.75	<u>10</u>	10.75%	233.33%	1.75
Data Not Avail	-100.00%	0	0.00%	-100.00%	0.00	<u>5</u>	3.11%	400.00%	4.33	<u>1</u>	1.08%	0.00%	0.00
Part-Time		<u>14</u>	2.91%		27.75	0	0.00%		0.00	0	0.00%		0.00
Total	417.20%	481	100.00%	198.76%	412.77	161	100.00%	73.12%	150.58	93	100.00%	165.71%	103.33

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following business questions:

- What do enrollment data indicate about the likely retention and degree completion rates of students?
- What have been the enrollment trends for my identified potential retention risk indicators?

Master Student Enrollment Trend - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period *	Select an academic period of data to display as the most recent academic period and look at enrollment trends.	p_Academic Period
Student Level *	Select a student level to specify which level of data to display in the report.	p_Student Level
Report Display Selection*	Select a Report Selection to display the required page in the report	Report Selection
Full Time Equivalent (FTE) Divisor *	Enter a number that will be used as the Full Time Equivalent (FTE) Divisor when calculating full time student headcounts for this report for an academic period and student level for an academic period and student level. The Full Time Equivalent (FTE) Divisor defines the number of credit hours that equal a full time course load for a student level.	p_FTE

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study.

Prompt	Description	Parameter
Program	Select one or more programs to display in the report.	p_Program
College	Select one or more colleges to display in the report.	p_College
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Master Student Enrollment Trend - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

The Student Full Profile report is available as a drill-through report from the following reports:

Parameter	Required	Method	Value
p_Academic Period	X	Pass data item value	This parameter can have the following values based on the headcount selected:
			• drill_Current_Period (headcount selected is for first year)
			• drill_Prior_Period1 (headcount selected is for second year)
			• drill_Prior_Period2 (headcount selected is for third year)
p_Enrolled Ind		Pass data item value	drill_Enrolled Ind
p_Registration Ind		Pass data item value	Registered Ind
p_Student Level	X	Pass parameter value	p_Student Level
The following parameter report.	ers only get pa	assed when the values ha	ave been selected in the
p_Student Population		Pass data item value	Student Population
p_Student Classification		Pass data item value	Student Classification
p_Student Cohort		Pass data item value	Student Cohort
p_Current Time Status		Pass data item value	Current Time Status
p_Gender		Pass data item value	Gender
p_Race Category		Pass data item value	Race Category
p_Citizenship Type		Pass data item value	Citizenship Type
p_Veteran Category		Pass data item value	Veteran Category
drill_Aid Offered Ind		Pass data item value	Aid Offered Ind

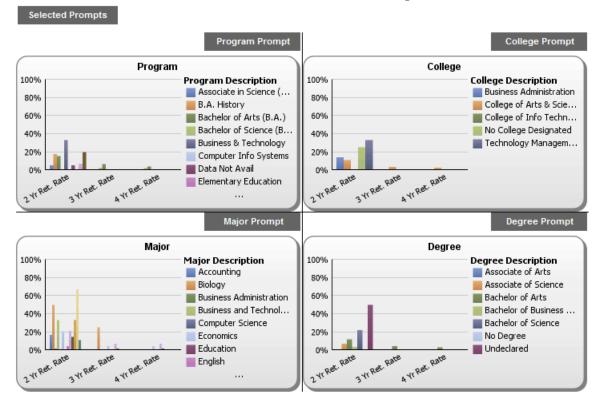
Parameter	Required	Method	Value
drill_Residency Ind		Pass data item value	Residency Ind
p_Campus		Pass data item value	Campus
p_College		Pass data item value	College
p_Program		Pass data item value	Program
p_Degree		Pass data item value	Degree
p_Major		Pass data item value	Major

Retention Multi-Year Rate by Academic Study Summary report

The report provides a look at multi-year retention rates by the following academic study categories: program, college, major, and degree. The report is filtered by a selected student level and academic period first attended.

Retention Multi-Year Rate by Academic Study Summary

Academic Period First Attended: Fall 2004, Undergraduate



This report displays a set of four graphs, one for each academic study category. Each of the four graphs drills to a report built in Query Studio that you can expand to see student level detail or rerun independently to see summarized level tabular data for each academic study category. Following are the four Query Studio reports used by the master report:

- Retention Multi-Year Rate by Program Summary
- Retention Multi-Year Rate by College Summary
- Retention Multi-Year Rate by Major Summary
- Retention Multi-Year Rate by Degree Summary

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers questions around how effective the retention programs and strategies are at your institution. This report answers the following business question:

• What does enrollment data indicate about the likely retention and degree completion rates of students?

Retention Multi-Year Rate by Academic Study Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period First Attended *	Select the Academic Period First Attended to specify which period of data to display in the report.	p_Acad Period First Attend Prompt
Student Level*	Select a student level to specify which level of data to display in the report.	p_Student Level Prompt
Multi-Year Retention Rate*	Select one or more Multi-Year Retention Rate values to display in the report.	p_Retention Rate Prompt

Academic Study prompts

The Academic Study prompts are required prompts that define which academic study values to include in each of the graphs of the report for the selected **Academic Period**First Attended and Student Level. These prompts are populated based on your selection for the Student Level prompt; the values will display after you choose a Student Level and will refresh by clicking on the cascade button to the right of the Multi-Year Graduation prompt box.

The report page displays a graph for each of the four academic study categories based on the values you select for the Academic Study prompts. After you run the report, you can change the values selected for any of the Academic Study prompts and rerun that graph of the report. To do this, select the appropriate (**Academic Study**) **Prompt** heading on the report, change the selected prompt values, and click **Submit**.

Prompt	Description	Parameter
Program *	Select one or more programs to display in the report.	p_Program Prompt
College *	Select one or more colleges to display in the report.	p_College Prompt
Major *	Select one or more majors to display in the report.	p_Major Prompt
Degree *	Select one or more degrees to display in the report.	p_Degree Prompt

Retention Multi-Year Rate by Academic Study Summary - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report you can click on one of the graphed values on any of the graphs to drill through to one of the following related list reports built in Query Studio.

- Retention Multi-Year Rate by Program Summary
- Retention Multi-Year Rate by College Summary
- Retention Multi-Year Rate by Major Summary
- Retention Multi-Year Rate by Degree Summary

The following table specifies the drill-through parameter values for the Query Studio list reports. These are the parameter values that need to be passed from the Retention Multi-Year Rate by Academic Study Summary report to the associated Query Studio report for the drill-through to work properly.

Parameter	Required	Method	Value
Academic_Period_ First_Attended_ Description		Pass parameter value	p_Acad Period First Attend Prompt
Student_Level_ Description		Pass parameter value	p_Student Level Prompt
Program_Description		Pass data value	Program Description
College_Description		Pass data value	College Description
Degree_Description		Pass data value	Degree Description
Major_Description		Pass data value	Major Description

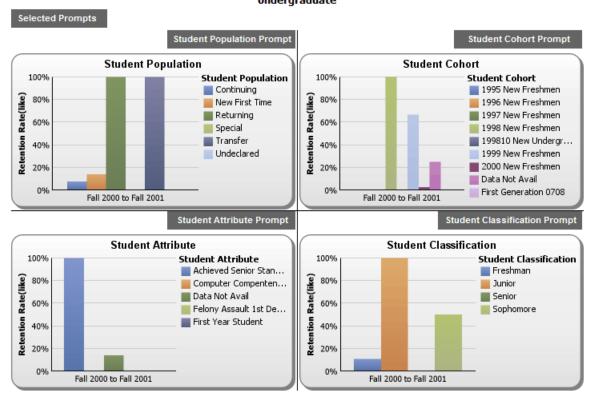
Parameter Notations

• The **Program_Description**, **College_Description**, **Degree_Description**, and **Major_Description** parameters are passed only to the associated Query Studio report for that academic study category.

Retention Period Rate by Student Group Summary report

The Retention Period Rate by Student Group Summary report provides a look at retention rates across the following student groups: attribute, classification, cohort, and population.

Retention Period Rate (Like) by Student Group Summary Undergraduate



This report is a master report, built in Report Studio, that displays a set of four graphs, one for each group. Each of the four graphs drills to a report built in Query Studio that you can rerun or expand to display student detail. You can also add data for each of the student groups represented in the four graphs. There are eight associated Query Studio reports; two versions for each student group based on whether you want to view Like or Sequential retention periods. Following are the Query Studio reports used by the master report:

- Retention Period Rate (Like/Sequential) by Student Attribute Summary
- Retention Period Rate (Like/Sequential) by Student Classification Summary
- Retention Period Rate (Like/Sequential) by Student Cohort Summary
- Retention Period Rate (Like/Sequential) by Student Population Summary

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following business questions:

- What group or cohort of students should retention strategies focus on?
- How do college retention and completion rates vary among groups of students?

Retention Period Rate by Student Group Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Retention Period Type *	Select "Like" to filter the report by retention periods for like terms, for example, Fall 2008 to Fall 2009.	p_Retention Period Type
	Select "Sequential" to filter the report by retention periods for sequential terms, for example, Fall 2008 to Spring 2009.	
Retention Period Like *	Select which Retention Period to display in the report. You can select from a list of Like or Sequential periods based on your selection for the Retention Period Type prompt.	p_Retention Period Like or p_Retention Period Sequential
Student Level	Select a student level to specify which level of data to display in the report.	p_Student Level

Prompt	Description	Parameter
Current Time Status	Select a time status to display in the report. If you don't select a time status, then all current time statuses are included in the report.	p_Current Time Status
Retention Rate %	Enter From and To values to define the percentage of retention range to display in the report. Select the "Lowest value" or "Highest value" to define the lowest and highest values used at your institution as the From and To values.	p_Retention Rate

Student Groupings prompts

The Student Groupings prompts are required prompts that filter the data corresponding to the appropriate graph on the report based on the student's population, cohort, attribute and classification for the selected retention period. These prompts are required indicated by an asterisk (*).

After you run the report, you can change the values selected for any of the Student Groupings prompts and rerun that graph of the report. To do this, select the appropriate (**Grouping**) **Prompt** heading on the report, change the selected prompt values, and click **Submit**.

Prompt	Description	Parameter
Student Population *	Select one or more student populations to display in the report.	p_Student Population
Student Cohort *	Select one or more student cohorts to display in the report.	p_Student Cohort
	NOTE: If the Student Cohort Active Ind=Yes, Student Cohort Report Ind=Yes, and the first term of the retention period falls within the student cohort begin and end term, then the student will be displayed in the report for the cohort selected.	
Student Attribute *	Select one or more student attributes to display in the report.	p_Student Attribute
Student Classification *	Select one or more student classifications to display in the report.	p_Student Classification

Retention Period Rate by Student Group Summary - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report you can click on one of the graphed values on any of the graphs to drill through to one of the following related list reports built in Query Studio.

- Retention Period Rate (Like/Sequential) by Student Attribute Summary
- Retention Period Rate (Like/Sequential) by Student Classification Summary
- Retention Period Rate (Like/Sequential) by Student Cohort Summary
- Retention Period Rate (Like/Sequential) by Student Population Summary

The following table specifies the drill-through parameter values for the Query Studio list reports. These are the parameter values that need to be passed from the Retention Period Rate by Student Group Summary report to the associated Query Studio report for the drill-through to work properly.

This report uses Cognos conditional blocks functionality to display different versions of the report based on which prompt and/or group values you select. To learn more about the conditional blocks functionality and understand their behavior, refer to Cognos documentation. The drill-through definitions are unique for each conditional block. The following table lists all drill through definitions for the multiple conditional blocks within the report design.

Parameter	Required	Method	Value
Current_Time_Status _Description		Pass parameter value	p_Current Time Status
Student_Level_ Description		Pass parameter value	p_Student Level
Retention_Period_ (Like)		Pass data item value	Retention Period (Like)
Retention_Period_ (Sequential)		Pass data item value	Retention Period (Sequential)
Student_Population_ Description2		Pass data item value	Student Population Description

Parameter	Required	Method	Value
Student_Classificatio n_Description		Pass data item value	Student Classification Description
Student_Cohort_ Description		Pass data item value	Student Cohort Description
Student_Attribute_ Description2		Pass data item value	Student Attribute Description

Parameter Notations

- The **Retention_Period_(Like)** and **Retention_Period_(Sequential)** parameters are passed only to the Query Studio reports of the same type: Like or Sequential.
- The Student_(Grouping)_Description parameters are passed only to the associated Student Grouping Query Studio report.

Student by Advisor Detail report

This report provides the ability to view a list of all students or a selected subset of students assigned to one or more advisors.

The following picture illustrates the report. Some sections of this report are not displayed based on the Show/Hide Categories selected to show in the report.

Student by Advisor Detail

Fall 2012

Show/Hide Categories Student Status Academic Study Academic Performance Academic Qualification Demographic

Show/Hide

Selected Prompts

Advisor			Stud	lent			Academic (ualification	5		Demog	graphic		
Advisor Name	Advisor Type	Primary Advisor Ind	Advisor First Academic Period	Advisor Last Academic Period	ID	Name	Secondary School GPA	Secondary School Percentile	Highest ACT Composite	Highest SAT Combined	Post Secondary School GPA	Post Secondary School Transfer Credits	Gender	Race
Garrison, Turner	Academic Counselor/Advisor	Yes	Fall 2012	The End of Time	208091205	Spencer, Jessica	3.980	99.00	0.0	0.0	2.000	0.00	Female	Data Not Avail
	Premed Advisor	Yes	Fall 2012	The End of Time	N00014034	Montclair, Ronnie			0.0	0.0	2.570	0.00	Male	Data Not Avail

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following business questions:

- How effective are my institution's retention programs and strategies?
- What group or cohort of students should retention strategies focus on?

Student by Advisor Detail - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period *	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level *	Select a student level to specify which level of data to display in the report.	p_Student Level

Advisor/Advisee prompts

Use the Advisor/Advisee prompts to define which advisors and their advisees to include in the report. The Advisor/Advisee prompts are populated based on your selections for the **Academic Period** and **Student Level** prompts. Select values for these prompts then click the Cascade button to access the Advisor/Advisee prompts.

Prompt	Prompt Description				
Advisor Name	p_Advisor Name				
Advisee Name	Advisee Name You can optionally specify to filter the report by selected advisees. Initially the Advisee Name prompt is blank. After you select advisors to include in the report, click the cascade button to populate the Advisee Name field. You can then select the specific advisees to display in the report. If specific advisees are not selected, then all advisees for the advisor selected will display in the report or be filtered by the additional prompts in this report.				
Advisor Type	You can optionally specify to filter the report by advisor type. Select one or more advisor types to display in the report.	p_Advisor Type			

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned

Prompt	Description	Parameter
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Student by Advisor Detail - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on one of the names to drill through to the Student Full Profile report. The following table specifies the drill-through parameter values for the Student Full Profile report. These are the parameter values that need to be passed from the Student by Advisor Detail to the Student Full Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass parameter value	p_Student Level
drill_Person_uid		Pass data item value	PERSON_UID
p_Academic Standing		Pass parameter value	p_Academic Standing
p_Total Credits Earned		Pass parameter value	p_Total Credits Earned

Student by Advisor Faculty Feedback report (New in 1.1)

This report provides the advisor the ability to view a list of all advisees or a selected subset of students based on Faculty Course Feedback session for an academic period.

The following picture illustrates the report. Some sections of this report are not displayed based on the Show/Hide Categories selected to show in the report. The Academic Study and Academic Performance sections are displayed below the other sections in this picture, however, in the actual report they display in line after the Student Status section.

Student by Advisor Faculty Feedback Detail

Fall 2012 - Fall 2012 Feedback 1

Selected Prompts

Show/Hide Categories							
✓ Student Status							
Academic Study							
Academic Performance							
Academic Qualification							
Demographic							
Show/Hide							

	Advisor					ent	Student Status			
Advisor Name	Advisor Type	Primary Advisor Ind	Advisor First Academic Period	Advisor Last Academic Period	ID	Name	Student Classification	Current Time Status	Registered Ind	Feedback Exist
Garrison, Turner	Academic Counselor/Advisor	Yes	Fall 2012	The End of Time	208091205	Spencer, Jessica	Freshman	Half Time	Yes	Feedback Exist
	Athletic Dept Advisor	No	Fall 2012	The End of Time	210009519	Bard, Celeste	Second Year Law	Less Than Half Time	Yes	No Feedback Exist
	Major	No	Fall 2012	The End of Time	210009410	Hopkins, Horace	Third Year Law	Less Than Half Time	Yes	No Feedback Exist

	Academic Study Academic Performance											
Student Level	Program	College	Major	Degree	Campus	Academic Period GPA	Cumulative GPA	Academic Standing Begin	Academic Standing End	Total Credits Attempted	Total Credits Passed	Total Credits Earned
Undergraduate	B.A. History	College of Arts & Science	History	Bachelor of Arts	Main	2.000	2.000	Good Standing	Data Not Avail	3.00	3.00	3.00
Law	Data Not Avail	College of Law	Law	Juris Doctor	Data Not Avail		4.167	Good Standing	Data Not Avail	3.00	3.00	3.00
Law	Data Not Avail	College of Law	Law	Juris Doctor	Data Not Avail		4.297	Good Standing	Data Not Avail	7.00	7.00	7.00

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following business questions:

- How effective are my institution's retention programs and strategies?
- What group or cohort of students should retention strategies focus on?

Student by Advisor Faculty Feedback - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter			
Academic Period*	Select an academic period to specify which period of data to display in the report.	p_Academic Period			
Student Level*	Level* Select a student level to specify which level of data to display in the report.				
Faculty Feedback Session*	Select a faculty feedback session to specify which session of data to display in the report.	p_Feedback Session			

Advisor/Advisee prompts

Use the Advisor/Advisee prompts to define which advisors and their advisees to include in the report. The Advisor/Advisee prompts are populated based on your selections for the **Academic Period** and **Student Level** prompts. Select values for these prompts then click the Cascade button to access the Advisor/Advisee prompts.

Prompt	Description	Parameter
Advisor Name	Use the Search feature on the report prompt page to find advisor names and choose them for inclusion in the report. You must specify at least one advisor to display in the report. When you use the Search feature to find advisor names, the search uses the Search type value "Contains any of these keywords" as the default search criteria.	p_Advisor Name
Advisee Name		
Advisor Type You can optionally specify to filter the report by advisor type. Select one or more advisor types to display in the report.		p_Advisor Type

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned

Prompt	Description	Parameter
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Student by Advisor Faculty Feedback - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can drill through to the Student Full Profile by Faculty Feedback report. The following table specifies the drill-through parameter values for the report. These are the parameter values that need to be passed from the Student by Advisor Faculty Feedback report to the Student Full Profile by Faculty Feedback report for the drill-through to work properly.

Parameter	Required	Method	Value
drill_person_uid		Pass Data Item	PERSON_UID
p_Academic Period	X	Pass Parameter Value	p_Academic_Period
p_Student Level	X	Pass Parameter Value	p_Student Level

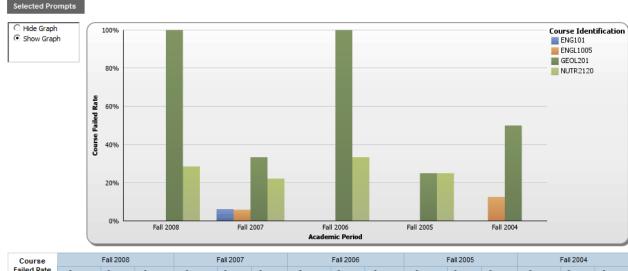
Student Course Performance by Course Trend report

The Student Course Performance by Course Trend report allows you to look at student course performance for institutional courses in academic history across a five year period.

The following picture illustrates the Student Course Performance by Course Trend report.

Student Course Performance by Course Trend

Fall 2008



Course	Fall 2008			Fall 2007			Fall 2006			Fall 2005			Fall 2004		
Failed Rate Course Identification	Course Attempted Count	Course Failed Count	Course Failed Rate												
ENG101	<u>30</u>	0	0.00%	<u>32</u>	2	6.25%				1	0	0.00%	3	0	0.00%
ENGL 1005	<u>32</u>	0	0.00%	<u>17</u>	1	5.88%	<u>31</u>	0	0.00%	<u>36</u>	0	0.00%	<u>79</u>	<u>10</u>	12.66%
GEOL201	<u>1</u>	1	100.00%	<u>6</u>	2	33.33%	<u>3</u>	<u>3</u>	100.00%	4	1	25.00%	<u>8</u>	4	50.00%
NUTR2120	<u>7</u>	2	28.57%	9	2	22.22%	9	<u>3</u>	33.33%	4	<u>1</u>	25.00%	<u>8</u>	0	0.00%

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following business questions:

- Where is my highest rate of course failure?
- Are any of the observations for the academic period selected a consistent trend over the last five years?

Student Course Performance by Course Trend - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period *	Select an academic period of data to display as the most recent academic period and look at course performance trends.	p_Academic Period
Course Level *	Select a Course Level to specify which level of course data to display in the report.	p_Course Level

Student Course Performance Measure prompts

You can filter the report to only display courses with a failure rate that falls within a specified range for the academic period selected. This is an optional filter; you do not have to apply it.

Prompt	Description	Parameter
Course Failure Rate Between (%)	Enter percentage values in the From and To fields to define the course failure rate range.	p_Course Failed Rate

Course Characteristics prompts

The Course Characteristics prompts are optional prompts that you can use to filter the report based on the subject, course number, or course administration.

Prompt	Description	Parameter
Subject or Course Number	You can filter the report results by specific subjects or course numbers. Use the Search feature on the report prompt page to find subjects or course numbers and choose them for inclusion in the report. When you use the Search feature to find a subject or course number, the search uses the Search type value "Contains any of these keywords" as the default search criteria.	p_Subject or Course Number
Course Administration	Choose a Course Administration value to specify which level of data to filter the report by. You can choose from Course Campus, Course College, Course Division, or Course Department.	p_Course Administratio n
One of the following Administration pro	ng prompts will display based on your selection for	or the Course
Course Campus	Select one or more course campuses to display in the report.	p_Course Campus
Course College	Select one or more course colleges to display in the report.	p_Course College
Course Department	Select one or more course departments to display in the report.	p_Course Department
Course Division	Select one or more divisions to display in the report.	p_Course Division

Student Course Performance by Course Trend - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report you can drill through to the Student Course Section Performance by Student Characteristics Summary report. The following table specifies the drill-through parameter values for the Student Course Section Performance by Student Characteristics Summary report. These are the parameter values that need to be passed from the Student

Course Performance by Course Trend report to the Student Course Section Performance by Student Characteristics Summary report for the drill-through to work properly.

This report uses Cognos conditional blocks functionality to display different versions of the report based on which prompt and/or group values you select. To learn more about the conditional blocks functionality and understand their behavior, refer to Cognos documentation. The drill-through definitions are unique for each conditional block. The following table lists all drill through definitions for the multiple conditional blocks within the report design.

Parameter	Required	Method	Value
p_Academic Period	X	Pass data item value	Academic Period
p_Course Level	X	Pass parameter value	p_Course Level
p_Course Identification		Pass data item value	Course Identification

Student Course Section Performance by Faculty Feedback Detail report (New in 1.1)

This report allows you to look at a detailed course roster, including student characteristics, course performance and faculty course feedback for institutional courses in academic history.

This report is a copy of the Student Course Section Performance by Student Detail report and includes an additional Faculty Feedback Session prompt that you can use to see a summary of student course faculty feedback on the report.

The following figure illustrates the this report.

Student Course Section Performance by Faculty Feedback Detail

Fall 2012, Undergraduate Institutional Courses in Academic History

Selected Prompts

SECTION DETAILS	
Course Identification	MATH1112 Section1
Course Reference	40103
Primary Instructor Name	Johnson, Peter
Instruction Delivery	Data Not Avail
Course Attribute	Data Not Avail
Course Section Cross List	Data Not Avail

SECTION STATS - Fall 2012 Feedback 2				
Course Attempted Count	7			
Course Pass Count	6			
Course Failed Count	1			
Monitored Headcount	4			
Feedback Exist Headcount	6			
Course Failed Rate	14.29%			
Course GPA	2.143			

STUDENT COURSE PERFORMANCE ROSTER - Fall 2012 Feedback 2

	Stı	udent			Cou	rse Perfor	mance		Faculty Feedba	ick Summa	iry	Acadeı	mic Perio	od Load &	Perfori	nance
ID	Name	Student Classification	Student Population	Mid- Term Grade	Final Grade	Repeat Course Indicator	Grade Change Count	Grade Change Reason	All Feedback Summary	Estimated Grade	Comment Count	Total Credits Attempted	Total Credits Earned	Academic Period GPA	Cum GPA	Academi Standing End
610009109	Adason, Marlene T.	First Year Law	New First Time	No Data	D	No	1	OE	Comment, Estimated Grade, Issue ,Recommendation	С	1	7.00	7.00		1.429	Data Not Avail
610009510	Cassell, Helene	Second Year Law	Continuing	No Data	В	No	1	OE	Recommendation	No Data	0	7.00	7.00		4.800	Data Not Avail
N00012576	DiMaio, Robert	First Year Law	Dual Degree Student	No Data	F	No	1	OE	Comment, Recommendation	No Data	1	10.00	6.00		2.100	Data Not Avail
210009410	Hopkins, Horace	Third Year Law	Continuing	No Data	A	No	1	OE	Estimated Grade	A	0	7.00	7.00		4.297	Data Not Avail
610009610	Mervin, Melva	First Year Law	New First Time	No Data	С	No	1	OE	Estimated Grade	I	0	7.00	4.00		1.143	Data Not Avail
N00014034	Montdair, Ronnie	Freshman	New First Time	No Data	В	No	1	OE	No Feedback	No Data	0	7.00	7.00	2.571	2.571	Data Not Avail
200405914	North, Sharon	Senior	Continuing	No Data	A	No	1	OE	Issue ,Recommendation	No Data	0	10.00	7.00	1.900	3.257	Data Not Avail

	Academic Study				Academic Qualifications									graphics
Student Level	College	Major	Degree	Secondary School Name	Secondary School GPA	Secondary School Percentile	Secondary School Rank	Highest ACT Composite	Highest SAT Combined	Post Secondary School (Latest) Name	Post Secondary School (Latest) GPA	Post Secondary School (Latest) Transfer Credits	Gender	Race Category
Law	College of Law	Law	Juris Doctor	Data Not Avail				0.0	0.0	Reed College	0.000	0.00	Female	American Indian or Alaska Native Black or
														African
Law	College of Law	Law	Juris Doctor	Downingtown Senior High School				0.0	0.0	Reed College	5.090	0.00	Female	Data Not Avail
Law	College of Law	Law	Juris Doctor	McKinley High School	3.300	90.00	69	0.0	0.0	Reed College	0.000	0.00	Male	Data Not Avail
Law	College of Law	Law	Juris Doctor	Data Not Avail				0.0	0.0	Villanova University	3.970	0.00	Male	Data Not Avail
Law	College of Law	Law	Juris Doctor	Downingtown Senior High School	3.820			0.0	0.0	Portland State University		0.00	Female	Data Not Avail
Undergraduate	College of Arts & Science	Communications	Bachelor of Arts	Data Not Avail				0.0	0.0	Reed College	2.570	0.00	Male	Data Not Avail
Undergraduate	College of Arts & Science	History	Bachelor of Arts	Central High East	3.750			0.0	1816.0	Reed College	2.870	0.00	Female	Data Not Avail

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers business questions like this: Which of my advisees should retention strategies focus on?

Student Course Section Performance by Faculty Feedback - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period of data to display the course section detail data for that academic period.	p_Academic Period
Course Level*	Select a Course Level to specify which level of course data to display in the report.	p_Course Level
Faculty Feedback Session*	Select a faculty feedback session to specify which session of data to display in the report.	p_Feedback Session

Student Course Section Performance Measure prompt

You can filter the report to only display course sections with a failure rate that falls within a specified range for the academic period selected. This is an optional filter; you do not have to apply it.

Prompt	Description	Parameter
Course Section Failure Rate Between (%)	Enter percentage values in the From and To fields to define the course section failure rate range.	p_Course Failed Rate

Course Section Characteristics prompts

The Course Section Characteristics prompts are optional prompts that you can use to filter the report based on the subject, course number, or other key course characteristics.

Prompt	Description	Parameter
Subject or Course Number	You can filter the report results by specific subjects, course numbers, or sections. Use the Search feature on the report prompt page to find subjects or course numbers and choose them for inclusion in the report. When you use the Search feature to find a subject or course number, the search uses the Search type value "Contains any of these keywords" as the default search criteria.	p_Subject or Course Number
Primary Instructor	Select one or more primary instructors to display in the report.	p_Primary Instructor
Course Attribute	Select one or more course attributes to display in the report.	p_Course Attribute
Instructional Method	Select one or more instructional methods to display in the report.	p_Instruction al Method
Cross List	Select one or more cross lists to display in the report.	p_Cross List

Course Administration prompts

The Course Administration prompts are optional prompts that you can use to filter the report based on a course administration attribute: course campus, course college, course division, or course department.

Prompt	Description	Parameter
Course Administration	Choose a Course Administration value to specify which level of data to filter the report by. You can choose from Course Campus, Course College, Course Division, or Course Department.	p_Course Administratio n
One of the following Administration pr	ng prompts will display based on your selection for compt.	or the Course
Course Campus	Select one or more course campuses to display in the report.	p_Course Campus
Course College	Select one or more course colleges to display in the report.	p_Course College
Course Department	Select one or more course departments to display in the report.	p_Course Department
Course Division	Course Division Select one or more divisions to display in the report.	

Student Characteristics prompts

The Student Characteristics prompts are optional prompts that allow you to filter the report by a selected student characteristic category.

Prompt	Description	Parameter
Student Characteristics	Choose a Student Characteristics value to specify what student characteristic will be displayed and grouped by on the report results. You can choose from Academic Study Category, Diversity Category or Student Groupings Category.	p_Student Characteristic

One of the following prompt groups will display based on your selection for the **Student Characteristics** prompt.

Academic Study Category

Prompt	Description	Parameter	
Academic Study Category	Choose which level of academic study information to include in the report. This prompt displays when you select a value of Academic Study Category for the Student Characteristics prompt.	p_Academic Study Category	
One of the following Study Category pr	ng prompts will display based on your selection for compt.	r the Academic	
College	Select one or more colleges to display in the report.	p_College	
Degree	Select one or more degrees to display in the report.	p_Degree	
Major	Select one or more majors to display in the report.	p_Major	
Program	Select one or more programs to display in the report.	p_Program	

Diversity Category

Prompt	Description	Parameter					
Diversity Category	Choose which diversity category to include in the report. This prompt displays when you select a value of Diversity Category for the Student Characteristics prompt.	p_Diversity Category					
One of the following Category prompt.	One of the following prompts will display based on your selection for the Diversity Category prompt.						
Citizenship	Select one or more citizenship value to include in the report.	p_Citizenship					
Enrolled Age Range	Select one or more age range values to include in the report.	p_Enrolled Age					
Gender	Select one or more genders to include in the report.	p_Gender					
Race Category	Select one or more race categories to include in the report.						

Student Groupings Category

Prompt	Description	Parameter					
Student Groupings Category	Choose which student groupings category to include in the report. This prompt displays when you select a value of Student Groupings Category for the Student Characteristics prompt.	p_Student Group Category					
	One of the following prompts will display based on your selection for the Student Groupings Category prompt.						
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute					
Student Classification	Select one or more student classifications to display in the report.	p_Student Classification					
Student Cohort	Select one or more student cohorts to display in the report.						
Student Population	F - F						

Student Course Roster Display prompts

The Student Course Roster Display prompts are optional prompts that allow you to define what results will display in the report. You can choose to include for display only students who passed or failed the course or received selected grade values.

Prompt	Description	Parameter	
Student Course Population	Select a Student Course Population to filter what is displayed in the report based on students' pass or fail status. The default setting includes all students in the report.	p_Course Performance Rate	
Final Grade	Select specific Final Grade values to filter what is displayed in the report to include only information for the selected grades.	p_Final Grade	

Student Course Section Performance by Faculty Feedback - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can drill through to the Student Full Profile by Faculty Feedback report. The following table specifies the drill-through parameter values for the report. These are the parameter values that need to be passed from the Student Course Section Performance by Faculty Feedback report to the Student Full Profile by Faculty Feedback report for the drill-through to work properly

Parameter	Required	Method	Value	
drill_person_uid		Pass Data Item	PERSON_UID	
p_Academic Period	X	Pass Parameter Value	p_Academic_Period	
p_Student Level	X	Pass Parameter Value	p_Student Level	

Student Course Section Performance by Faculty Feedback Summary report (New in 1.1)

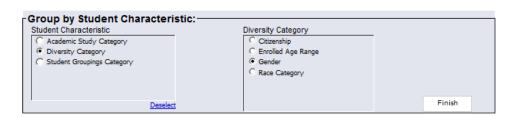
This report allows you to look at student characteristics, course performance and faculty course feedback for institutional courses in academic history.

This report is a copy of the Student Course Section Performance by Student Characteristics Summary report and includes an additional Faculty Feedback Session prompt that you can use to see a summary of student course faculty feedback on the report.

The following picture illustrates this report.

Student Course Section Performance by Faculty Feedback Summary

Fall 2012-Mini Term, Undergraduate Level Courses in Academic History by Diversity Category



Feedback Session: Fall 2012 Mini - Feedback 2

Selected Prompts

Course Identification	Section	Gender	Course GPA	Course Attempted Count	Course Failed Count	Course Failed Rate	Monitored Student Headcount	Feedback Exists Headcount	Retention Headcount (Sequential)	Retention Rate (Sequential)
ENGL203 0	0	Female	2.000	<u>3</u>	<u>1</u>	33.33%	2	0	0	0.00%
		Not Reported	1.000	<u>1</u>	0	0.00%	0	0	0	0.00%
	0		4	1	25.00%	2	0			
MATH106	0	Female	1.000	3	<u>2</u>	66.67%	2	2	0	0.00%
		Male	1.400	<u>3</u>	<u>1</u>	33.33%	2	2	0	0.00%
	0			6	3	50.00%	4	4		
MATH112	1	Female	2.857	2	0	0.00%	2	1	0	0.00%
	1			2	0	0.00%	2	1		
PSYC1000	99	Male	0.000	<u>1</u>	<u>1</u>	100.00%	1	1	0	0.00%
	99		1	1	100.00%	1	1			
	17	Female	0.000	<u>1</u>	<u>1</u>	100.00%	1	0	0	0.00%
17		1	1	100.00%	1	0				

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following types of business questions:

- Where is my highest rate of course failure?
- What impact has Faculty Feedback had?
- What are the characteristics of the students who fail?

Student Course Section Performance by Faculty Feedback Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period of data to display the course section summary data for that academic period.	p_Academic Period
Course Level *	Select a Course Level to specify which level of course data to display in the report.	p_Course Level
Faculty Feedback Session *	Select a faculty feedback session to specify which session of data to display in the report.	p_Feedback Session

Student Course Section Performance Measure prompt

You can filter the report to only display course sections with a failure rate that falls within a specified range for the academic period selected. This is an optional filter; you do not have to apply it.

Prompt	Description	Parameter
Course Section Failure Rate Between (%)	Enter percentage values in the From and To fields to define the course section failure rate range.	p_Course Failed Rate

Course Section Characteristics prompts

The Course Section Characteristics prompts are optional prompts that you can use to filter the report based on the subject, course number, or other key course characteristics.

Prompt	Description	Parameter
Subject or Course Number	You can filter the report results by specific subjects, course numbers, or sections. Use the Search feature on the report prompt page to find subjects or course numbers and choose them for inclusion in the report. When you use the Search feature to find a subject or course number, the search uses the Search type value "Contains any of these keywords" as the default search criteria.	p_Subject or Course Number
Primary Instructor	Select one or more primary instructors to display in the report.	p_Primary Instructor
Course Attribute	Select one or more course attributes to display in the report.	p_Course Attribute
Instructional Method	Select one or more instructional methods to display in the report.	p_Instruction al Method
Cross List	Select one or more cross lists to display in the report.	p_Cross List

Course Administration prompts

The Course Administration prompts are optional prompts that you can use to filter the report based on a course administration attribute: course campus, course college, course division, or course department.

Prompt	Description	Parameter
Course Administration One of the followin Administration processing the second	Choose a Course Administration value to specify which level of data to filter the report by. You can choose from Course Campus, Course College, Course Division, or Course Department. In prompts will display based on your selection for compt.	p_Course Administratio n
Course Campus	Select one or more course campuses to display in the report.	p_Course Campus
Course College	Select one or more course colleges to display in the report.	p_Course College

Prompt	Description	Parameter
Course Department	Select one or more course departments to display in the report.	p_Course Department
Course Division	Select one or more divisions to display in the report.	p_Course Division

Group by Student Characteristics prompts

The Group by Student Characteristics prompts are optional prompts that allow you to group the report by a selected student characteristic category. These prompts are not filters, they only define the student characteristic to display and group by on the report.

Prompt	Description	Parameter
Student Characteristics	Choose a Student Characteristics value to specify what student characteristic will be displayed and grouped by on the report results. You can choose from Academic Study Category, Diversity Category or Student Groupings Category.	p_Student Characteristic
One of the following Characteristics pr	ng prompts will display based on your selection for compt.	or the Student
Academic Study Category	Choose which level of academic study information to display and group the report by.	p_Diversity Category
Diversity Category	Choose which diversity category to display and group the report by.	p_Diversity Category
Student Groupings Category	Choose which student groupings category to display and group the report by.	p_Diversity Category

You have the option to change the Group by Student Characteristics prompts directly on the report page. To do this, on the report page select different **Student Characteristics** values and click **Finish** to rerun the report and group based on the new student characteristic selections.

Student Course Section Performance by Faculty Feedback Summary - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can drill through to the Student Course Section Performance by Faculty Feedback report. The following table specifies the drill-through parameter values for the report. These are the parameter values that need to be passed from the Student Course Section Performance by Faculty Feedback Summary report to the Student Course Section Performance by Faculty Feedback report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic_Period	X	Pass Parameter Value	p_Academic_Period
p_Course Level	X	Pass Parameter Value	p_Course Level
p_Feedback Session	X	Pass Parameter Value	p_Faculty Feedback Session
p_drill_Diversity Category		Pass Parameter Value	p_Diversity Category
p_drill_Student Characteristic		Pass Data Item Value	calc_Student Characteristic
drill_Course Reference Number		Pass Data Item Value	Course Reference Number
p_Course Failed Rate		Pass Parameter Value	p_Course Failed Rate
p_Course Id		Pass Data Item Value	Course Identification
p_Section		Pass Data Item Value	Section
p_Subject or Course Number		Pass Parameter Value	p_Subject or Course Number

Student Course Section Performance by Student Characteristics Summary report

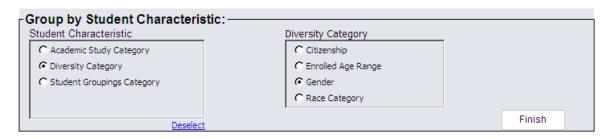
This report provides a look at course section performance and can be filtered across the following course characteristics: primary instructor, course attribute, instructional method, and cross list. The report provides the ability to group and display the report by selected student characteristics.

The following figure illustrates this report.

Student Course Section Performance by Diversity Category Summary

Fall 2004, Undergraduate Level Courses in Academic History

Selected Prompts



Course Identification	Section	Gender	Course GPA	Course Attempted Count	Course Failed Count	Course Failed Rate	Retention Headcount (Sequential)	Retention Rate (Sequential)
CH1010	A01A	Male	3.176	<u>17</u>	0	0.00%	16	94.12%
		Female	3.167	<u>6</u>	0	0.00%	6	100.00%
	A01A			23	0	0.00%		
	A01B	Male	3.333	<u>15</u>	0	0.00%	15	100.00%
		Female	3.500	<u>8</u>	0	0.00%	8	100.00%
	A01B			23	0	0.00%		
	A01C	Male	3.000	<u>12</u>	0	0.00%	11	91.67%
		Female	3.273	<u>11</u>	0	0.00%	10	90.91%
	A01C			23	0	0.00%		
A02A	A02A	Male	3.462	<u>15</u>	<u>2</u>	13.33%	15	100.00%
		Female	2.667	<u>6</u>	0	0.00%	6	100.00%

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following business questions:

- Where is my highest rate of course failure?
- What are the characteristics of the students who fail?

Student Course Section Performance by Student Characteristics Summary - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period *	Select an academic period of data to display the course section summary data for that academic period.	p_Academic Period
Course Level *	Select a Course Level to specify which level of course data to display in the report.	p_Course Level

Student Course Section Performance Measure prompt

You can filter the report to only display course sections with a failure rate that falls within a specified range for the academic period selected. This is an optional filter; you do not have to apply it.

Prompt	Description	Parameter
Course Section Failure Rate Between (%)	Enter percentage values in the From and To fields to define the course section failure rate range.	p_Course Failed Rate

Course Section Characteristics prompts

The Course Section Characteristics prompts are optional prompts that you can use to filter the report based on the subject, course number, or other key course characteristics.

Prompt	Description	Parameter
Subject or Course Number	You can filter the report results by specific subjects, course numbers, or sections. Use the Search feature on the report prompt page to find subjects or course numbers and choose them for inclusion in the report. When you use the Search feature to find a subject or course number, the search uses the Search type value "Contains any of these keywords" as the default search criteria.	p_Subject or Course Number
Primary Instructor	Select one or more primary instructors to display in the report.	p_Primary Instructor
Course Attribute	Select one or more course attributes to display in the report.	p_Course Attribute
Instructional Method	Select one or more instructional methods to display in the report.	p_Instruction al Method
Cross List	Select one or more cross lists to display in the report.	p_Cross List

Course Administration prompts

The Course Section Characteristics prompts are optional prompts that you can use to filter the report based on the subject, course number, or other key course characteristics.

Prompt	Description	Parameter
Administration pr	compt.	
Course Campus	Select one or more course campuses to display in the report.	p_Course Campus
Course College	Select one or more course colleges to display in the report.	p_Course College

Prompt	Description	Parameter
Course Department	Select one or more course departments to display in the report.	p_Course Department
Course Division	Select one or more divisions to display in the report.	p_Course Division

Group by Student Characteristics prompts

The Group by Student Characteristics prompts are optional prompts that allow you to group the report by a selected student characteristic category. These prompts are not filters, they only define the student characteristic to display and group by on the report.

Prompt	Description	Parameter	
Student Characteristics	Choose a Student Characteristics value to specify what student characteristic will be displayed and grouped by on the report results. You can choose from Academic Study Category, Diversity Category or Student Groupings Category.	p_Student Characteristic	
One of the following Characteristics pr	ng prompts will display based on your selection for compt.	or the Student	
Academic Study Category	Choose which level of academic study information to display and group the report by.	p_Diversity Category	
Diversity Category	Choose which diversity category to display and group the report by.	p_Diversity Category	
Student Groupings Category	Choose which student groupings category to display and group the report by.	p_Diversity Category	

You have the option to change the Group by Student Characteristics prompts directly on the report page. To do this, on the report page select different **Student Characteristics** values and click **Finish** to rerun the report and group based on the new student characteristic selections.

Student Course Section Performance by Student Characteristics Summary - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on one of the blue values to drill through to the Student Course Section Performance by Student Detail report. The following table specifies the drill-through parameter values for the Student Course Section Performance by Student Detail report. These are the parameter values that need to be passed from the Student Course Section Performance by Student Characteristics Summary report to the Student Course Section Performance by Student Detail report for the drill-through to work properly.

This report uses Cognos conditional blocks functionality to display different versions of the report based on which prompt and/or group values you select. To learn more about the conditional blocks functionality and understand their behavior, refer to Cognos documentation. The drill-through definitions are unique for each conditional block. The following table lists all drill through definitions for the multiple conditional blocks within the report design.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Course Level	X	Pass parameter value	p_Course Level
p_drill_Diversity Category		Pass parameter value	p_Diversity Category
p_drill_Student Characteristic		Pass parameter value	calc_Student Characteristic
drill_Course Reference Number		Pass data item value	Course Reference Number
p_Course Failed Rate		Pass parameter value	p_Course Failed Rate
p_Course Id		Pass data item value	Course Identification
p_Section		Pass data item value	Section
p_Subject or Course Number		Pass parameter value	p_Subject or Course Number
p_Course Performance Rate		Pass parameter value	p_Course Performance Rate

The Student Course Section Performance by Student Characteristics Summary report is also available as a drill-through report from the following report:

• Student Course Performance by Course Trend

Refer to the section describing that report for detailed information about it and the drill-through definitions to this report.

Student Course Section Performance by Student Detail report

This report provides a look at student characteristics related to course performance for institutional courses in academic history.

The following figure illustrates the this report.

Student Course Section Performance by Student Detail

Fall 2007, Undergraduate Institutional Courses in Academic History

Selected Prompts

SECTION DETAILS	
Course Identification	ENGL1005 Section0
Course Reference	10013
Primary Instructor Name	Forman, Steven
Instruction Delivery	Data Not Avail
	Artistic & Literature
Course Section Cross List	Data Not Avail

SECTION STATS	
Course Attempted Count	1
Course Pass Count	0
Course Failed Count	1
Course Failed Rate	100.00%
Course GPA	0.000

STUDENT COURSE PERFORMANCE ROSTER

STODENT	STODENT COOKSE PERFORMANCE ROSTER												
	Student				Course Performance				Acade	mic Peri	od Load &	Perfor	nance
ID	Name	Student Classification	Student Population	Mid- Term Grade	Final Grade	Repeat Course Indicator	Grade Change Count	Grade Change Reason	Total Credits Attempted	Total Credits Earned	Academic Period GPA	Cum GPA	Academic Standing End
N00013879	Shaw, Cindy	Freshman	New First Time	No Data	F	No	1	OE	13.00	0.00	0.000	0.000	Data Not Avail

Academic Study					Academic Qualifications							
Student Level	College		Degree	Secondary School Name	Secondary School GPA	Secondary School Percentile	Secondary School Rank	Highest ACT Composite	Highest SAT Combined	Post Secondary School (Latest) Name	Post Secondary School (Latest) GPA	Post Secondary School (Latest) Transfer Credits
Undergraduate	College of Arts & Science	Education	Bachelor of Arts	Data Not Avail				0.0	0.0	Reed College	0.000	0.00

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report answers the following types of business questions:

- Where is my highest rate of course failure?
- What are the characteristics of the students who fail?

Student Course Section Performance by Student Detail - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period of data to display the course section detail data for that academic period.	p_Academic Period
Course Level*	Select a Course Level to specify which level of course data to display in the report.	p_Course Level

Student Course Section Performance Measure prompt

You can filter the report to only display course sections with a failure rate that falls within a specified range for the academic period selected. This is an optional filter; you do not have to apply it.

Prompt	Description	Parameter
Course Section Failure Rate Between (%)	Enter percentage values in the From and To fields to define the course section failure rate range.	p_Course Failed Rate

Course Section Characteristics prompts

The Course Section Characteristics prompts are optional prompts that you can use to filter the report based on the subject, course number, or other key course characteristics.

Prompt	Description	Parameter
Subject or Course Number	You can filter the report results by specific subjects, course numbers, or sections. Use the Search feature on the report prompt page to find subjects or course numbers and choose them for inclusion in the report. When you use the Search feature to find a subject or course number, the search uses the Search type value "Contains any of these keywords" as the default search criteria.	p_Subject or Course Number
Primary Instructor	Select one or more primary instructors to display in the report.	p_Primary Instructor
Course Attribute	Select one or more course attributes to display in the report.	p_Course Attribute
Instructional Method	Select one or more instructional methods to display in the report.	p_Instruction al Method
Cross List	Select one or more cross lists to display in the report.	p_Cross List

Course Administration prompts

The Course Administration prompts are optional prompts that you can use to filter the report based on a course administration attribute: course campus, course college, course division, or course department.

Prompt	Description	Parameter	
Course Administration	Choose a Course Administration value to specify which level of data to filter the report by. You can choose from Course Campus, Course College, Course Division, or Course Department.	p_Course Administratio n	
One of the followin Administration pr	ng prompts will display based on your selection for compt.	or the Course	
Course Campus	Select one or more course campuses to display in the report.	p_Course Campus	
Course College	Select one or more course colleges to display in the report.	p_Course College	

Prompt	Description	Parameter
Course Department	Select one or more course departments to display in the report.	p_Course Department
Course Division	Select one or more divisions to display in the report.	p_Course Division

Student Characteristics prompts

The Student Characteristics prompts are optional prompts that allow you to filter the report by a selected student characteristic category.

Prompt	Description	Parameter
Student Characteristics	Choose a Student Characteristics value to specify what student characteristic will be displayed and grouped by on the report results. You can choose from Academic Study Category, Diversity Category or Student Groupings Category.	p_Student Characteristic

One of the following prompt groups will display based on your selection for the **Student Characteristics** prompt.

Academic Study Category

Prompt	Description	Parameter		
Academic Study Category	Choose which level of academic study information to include in the report. This prompt displays when you select a value of Academic Study Category for the Student Characteristics prompt.	p_Academic Study Category		
	One of the following prompts will display based on your selection for the Academic Study Category prompt.			
College	Select one or more colleges to display in the report.	p_College		
Degree	Select one or more degrees to display in the report.	p_Degree		

Prompt	Description	Parameter
Major	Select one or more majors to display in the report.	p_Major
Program	Select one or more programs to display in the report.	p_Program

Diversity Category

Prompt	Description	Parameter
Diversity Category	Choose which diversity category to include in the report. This prompt displays when you select a value of Diversity Category for the Student Characteristics prompt.	p_Diversity Category
One of the following Category prompt.	ng prompts will display based on your selection fo	or the Diversity
Citizenship	Select one or more citizenship value to include in the report.	p_Citizenship
Enrolled Age Range	Select one or more age range values to include in the report.	p_Enrolled Age
Gender	Select one or more genders to include in the report.	p_Gender
Race Category	Select one or more race categories to include in the report.	p_Race Category

Student Groupings Category

Prompt	Description Paran		
Student Groupings Category	Choose which student groupings category to include in the report. This prompt displays when you select a value of Student Groupings Category for the Student Characteristics prompt.	p_Student Group Category	
One of the following prompts will display based on your selection for the Student Groupings Category prompt.			
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute	

Prompt	Description	Parameter
Student Classification	Select one or more student classifications to display in the report.	p_Student Classification
Student Cohort	Select one or more student cohorts to display in the report.	p_Student Cohort
Student Population	Select one or more student populations to display in the report.	p_Student Population

Student Course Roster Display prompts

The Student Course Roster Display prompts are optional prompts that allow you to define what results will display in the report. You can choose to include for display only students who passed or failed the course or received selected grade values.

Prompt	Description	Parameter
Student Course Population	Select a Student Course Population to filter what is displayed in the report based on students' pass or fail status. The default setting includes all students in the report.	p_Course Performance Rate
Final Grade	Select specific Final Grade values to filter what is displayed in the report to include only information for the selected grades.	p_Final Grade

Student Course Section Performance by Student Detail - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

The Student Course Section Performance by Student Detail report is available as a drill-through report from the Student Course Section Performance by Student Characteristics Summary report.

Refer to the section describing that report for detailed information about it and the drill-through definitions to this report.

Student Full Profile report

This report provides an overall picture that summarizes a student's information related to enrollment, academic study, academic performance, admissions, financial aid status, prior education, advisors, cohorts, attributes, and activities.

The following picture illustrates the Student Full Profile report.

Student Full Profile

Fall 2004

Ahmad, Suzy Elaine Z.	Confidential: No					A2005059
Enrollment Summary		Demographics				
Current Time Status:	Full-time	Gender:		Female		
Enrolled:	Yes	Race Category:		Data Not A	wail	
Student Classification:	Senior	Current Age:		27		
Student Population:	Continuing	Citizenship:		Citizen		
Permit Registration:	Yes	Veteran Category:		Data Not A	wail	
Registered:	Yes					
Residency:	In state Resident					
Active Hold:	No					
Academic Study Summary		Academic Perform	nance Summary			
Student Level:	Undergraduate	Cumulative GPA:		3.528		
Program:	Actuarial Mathematics	Academic Period GP		3.667		
College:	Class of 05	Academic Standing		Good Star	_	
Degree:	Bachelor of Science	Academic Standing		Good Star	nding	
Major:	Actuarial Mathematics	Total Credits Attemp		9.00		
Campus:	Main	Total Credits Earned	:	9.00		
Admission Summary		Prior Education				
Admit Academic Period:	Fall 2001	Secondary	<u>Name</u>		GPA Pe	ercentile
Admission Population: Admit Age:	Regular Decision 18		Northwest Pa Colleg	giate Acad	4.000	99.00
Trainine Tigo.		Post-Secondary	<u>Name</u>	GPA Cr	edits Trans	sferred
			Advanced Placemen	nt	12.00	
Financial Aid Status		Current Advisor(s)				
Aid Status:	Aid Status Record	<u>Name</u>	<u>Type</u>	<u>Begin</u>	<u>End</u>	Primary Advisor
Aid Offered: Aid Accepted:	Aid Offered Aid Accepted	Pasker, Ramon M.	Data Not Avail	Fall 2003	Fall 2004	Yes
Aid Paid:	Aid Paid	Zenex, Rebekah B.	Advisor for 1st Minor	Fall 2003	Fall 2004	No
Student Attributes	Student Activities	Student Cohorts				
Common Application	Data Not Avail	Student Cohort	Begin Term End To	erm		
Financial Aid Applicant		Fall 2001 Freshmen	Fall 2001 Fall 20	001		
Pre-Medical						

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report provides detail level data related to a student and is the drill source report for several summary and detail level reports. You can also run this report directly as a stand alone report.

Selected Brompts

Student Full Profile - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period *	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level *	Select a student level to specify which level of data to display in the report.	p_Student Level

Student prompt

You can filter the report results by specific student names or Student IDs. The Student prompt is populated based on your selections for the **Academic Period** and **Student Level** prompts. Select values for these prompts then click the Cascade button to access the Student prompt. Use the search feature on the report prompt page to find names or IDs and choose them for inclusion in the report.

Prompt	Description	Parameter
Student Name - Student ID	Select the list of students to be displayed in the report.	p_Stuent Name

When you use the Search feature to find student names or IDs, the search uses the **Search type** value "Contains any of these keywords" as the default search criteria.

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study.

Prompt	Description Parame	
Program	Select one or more programs to display in the report.	p_Program
College	Select one or more colleges to display in the report.	p_College
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Student Full Profile - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

The Student Full Profile report is available as a drill-through report from the following reports:

- Student List Detail
- Student by Advisor Detail

Refer to the sections describing those reports for detailed information about them and the drill-through definitions to this report.

Student Full Profile by Faculty Feedback report (New in 1.1)

This report provides an overall picture that summarizes a student's information related to enrollment, academic study, academic performance, admissions, financial aid status, prior education, advisors, cohorts, attributes, activities, and faculty feedback received for the academic period selected.

The following picture illustrates this report.

Student Full Profile by Faculty Feedback

Fall 2012

Andrew, Kim			Confider	ntial:							20	0910115
Enrollment Summar	у				Demo	graphics						
Current Time Status:		Half T	ime		Gender	r:			Fe	male		
Enrolled:		Yes			Race Category: Data Not Avail							
Student Classification:		Freshi	man		Current	t Age:			21			
Student Population:		New F	irst Time		Citizen	ship:			U.	S. Citizen		
Permit Registration:		Yes			Vetera	1 Category:			Da	ita Not Avail		
Registered:		Yes										
Residency:		Resid	ent									
Active Hold:		Yes										
Hold Process Indica	tors											
Application Hold:		No										
AR Hold:		No										
Compliance Hold:		No										
Enrollment Verification	1:	No										
Grade Report:		Yes										
Graduation Hold:		Yes										
Registration Hold:		Yes										
Transcript Hold:		Yes										
Academic Study Sur	mmarv				Acade	mic Performa	nce Su	mmarv				
Student Level:	illinui y	Under	graduate			itive GPA:	nee ou	iiiiiiiiiiii y	4	000		
Program:			History			nic Period GPA				000		
College:			ge of Arts & Science			nic Standing Be				ood Standing		
Degree:			elor of Arts		1	nic Standing En	_			ata Not Avail		
Major:		Histor				redits Attempted				00		
Campus:			y Not Avail			redits Earned:	4.			.00		
Faculty Feedback Su		Data	NOT AVAIL		Total C	reuits Earneu.			0	.00		
			T =	T								
Course Identification	Primary Instructor	Name	Feedback Session	Latest Issue/Re	ec. Date	Issue/Rec. T	ype	Commer	it Lat	est Comment/Est. Grade	Date	Est. Grade
MATH100	Hebert, Paul		Fall 2012 Feedback 1			Data Not Avail		No Data				No Data
			Fall 2012 Feedback 2	9-Dec-2012		RECOMMENDA	TION	No Data				No Data
MATH1112	Garrison, Turner		Fall 2012 Feedback 1			Data Not Avail		No Data				No Data
			Fall 2012 Feedback 2			Data Not Avail		No Data				No Data
MATH618	Garrison, Turner		Fall 2012 Feedback 1			Data Not Avail		No Data				No Data
			Fall 2012 Feedback 2	9-Dec-2012		ISSUE		No Data				No Data
			Fall 2012 Feedback 2	9-Dec-2012		RECOMMENDA	TION	No Data				No Data
Admission Summar						ducation						
Admit Academic Perio		Fall 2			Second	lary	Name		GPA	Percentile Percentile		
Admission Population:			Admit				Data I	Not Avail				
Admit Age:		18										
					Post-Se	econdary	Name		<u>GPA</u>	Credits Transferred		
							Reed	College	2.000	0.00		
Financial Aid Status				Curre	nt Advisor(s)		_					
Aid Status: No Aid Status Record			Name	Туре			Begin	End	Prima	ary Advisor		
Aid Offered: No Aid Offered		I — —				_						
Aid Accepted: No Aid Accepted		Bardel, Biology Advisor			Fall	Fall Aid Enrollment		No				
Aid Paid: No Aid Paid			Gregory			2012	Period					
			Grimm Aaron			or	Fall 2012	Fall Aid Enrollment Period		Yes		
Student Attributes		Stud	ent Activities		Student Cohorts							
Data Not Avail		Data	Not Avail		Studer	nt Cohort Begin	Term		End	Term		
					Student Cohort Begin Term End Term Data Not Avail ***Data Not Available*** ***Data Not Available***							
					Data N	or AvairDa	La NOT A	wallable.		Ata NOI AVAIIADIE		

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report provides the information needed to answer this type of business question: What group or cohort of students should retention strategies focus on?

Student Full Profile by Faculty Feedback - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period *	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level *	Select a student level to specify which level of data to display in the report.	p_Student Level
Faculty Feedback Session *	Select a faculty feedback session to specify which session of data to display in the report.	p_Feedback Session

Student prompt

You can filter the report results by specific student names or Student IDs. The Student prompt is populated based on your selections for the **Academic Period** and **Student Level** prompts. Select values for these prompts then click the Cascade button to access the Student prompt. Use the search feature on the report prompt page to find names or IDs and choose them for inclusion in the report.

Prompt	Description	Parameter
Student Name - Student ID	Select the list of students to be displayed in the report.	p_Stuent Name

When you use the Search feature to find student names or IDs, the search uses the **Search type** value "Contains any of these keywords" as the default search criteria.

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study.

Prompt	Description	Parameter
Program	Select one or more programs to display in the report.	p_Program
College	Select one or more colleges to display in the report.	p_College
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Student List Detail report

This report includes details about a student's information such as demographics, student status, academic study, academic performance, and student groups.

The following pictures illustrates the Student List Detail report. This is a landscape report that is wide if you choose to display all categories of information. The picture segments the information using the Show/Hide Categories feature to illustrate various categories of the data.

Student List Detail

Fall 2004

Selected Prompts

Show/Hide Categories

Academic Study
Academic Performance
Academic Qualification
Advisor

Show/Hide

Student	lent Student Status				Acade	mic Study					Academi	ic Perform	ance		
Name	Student Classification	Current Time Status	Registered Ind	Program	College	Major	Degree	Campus	Academic Period GPA	Cumulative GPA	Academic Standing Begin	Academic Standing End	Total Credits Attempted	Total Credits Passed	Total Credits Earned
Temple, Shirley TU0000002	Senior	Data Not Avail	No	Accounting	Business Administration	Accounting	Bachelor of Business Admin.	Data Not Avail		3.205	Good Standing	Data Not Avail	0.00	0.00	0.00
Truman, William 200110111	Junior	Full Time	Yes	Accounting	Business Administration	Accounting	Bachelor of Business Admin.	Main	1.750	2.885	Good Standing	Data Not Avail	12.00	12.00	12.00
Tulner, Henk RJS000002	Freshman	Data Not Avail	No	Accounting	Business Administration	Accounting	Bachelor of Business Admin.	Main		2.750	Good Standing	Data Not Avail	0.00	0.00	0.00

Academic Qualifications						Demo	graphic		Advisor(s)	
Secondary School GPA	Secondary School Percentile	Highest ACT Composite	Highest SAT Combined	Post Secondary School (Latest) GPA	Post Secondary School (Latest) Transfer Credits	Gender	Race Category	Advisor Name	Advisor Type	Primary Advisor Ind
		0.0	0.0			Female	Data Not Avail	Burns, Linda	Major	Yes
2.200	91.00	0.0	0.0	3.130	0.00	Male	Data Not Avail	Johnson, Peter B.	Major	Yes
2.800	90.00	0.0	1637.0	2.750	0.00	Data Not	Data Not Avail	Frazier, Agnes	Biology Advisor	No
						Avail		Johnson, Brent P.	Thesis Committee Advisor	Yes
								Staley, Bradley	External Transcript	No

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report provides the detail to support all business questions related to student characteristics and the impact on student progression, for example, "What group or cohort of students should my retention strategies focus on?"

Student List Detail - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories. You can expand or collapse the display of some prompt groups. A (+) or (-) at the beginning of a prompt category name indicates that you can click that category heading to expand (show) or collapse (hide) the prompts in that group.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level*	Select a student level to specify which level of data to display in the report.	p_Student Level

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study. Select values for all required Selection prompts then click the Cascade button populate the Academic Study prompts.

Prompt	Description	Parameter
Program	Select one or more programs to display in the report.	p_Program
College	Select one or more colleges to display in the report.	p_College
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Demographic prompts

These prompts are optional prompts that you can use to filter the report based on certain personal characteristics of a student.

Prompt	Description	Parameter
Gender	Select one or more genders to display in the report.	p_Gender
Citizenship Type	Select one or more citizenship types to display in the report.	p_Citizenship Type
Race Category	Select one or more race categories to display in the report.	p_Race Category
Veteran Category	Select one or more veteran categories to display in the report.	p_Veteran Category

Student Status prompts

The Student Status prompts are optional prompts that you can use to filter the report based on various statuses of a student.

Prompt	Description	Parameter
Enrolled Ind	Select to filter the report by students who are enrolled or not enrolled.	p_Enrolled Ind
Permit Registration Ind	Select to filter the report by students permitted or not permitted to register.	p_Permit Registration
Registered Ind	Select to filter the report by students who are registered or not registered.	p_ Registration Ind
New Student Ind	Select to filter the report by students who are new or not new.	p_New Student Ind
Withdrawn Student Ind	Select to filter the report by students who have withdrawn or not withdrawn.	p_Withdrawn Ind
Graduated Ind	Select to filter the report by students who have been awarded.	p_Outcome Awarded Ind
Enrollment Status	Select to filter the report by a student's enrollment status.	p_Enrollment Status
Student Status	Select to filter the report by a student's status.	p_Student Status
Current Time Status	Select to filter the report by a student's current time status.	p_Current Time Status

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned

Prompt	Description	Parameter
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the end of the academic period.	p_Academic Standing

Student Groupings prompts

The Student Groupings prompts are optional prompts that you can use to filter the report based on the student's population, cohort, attribute and/or classification for the selected term and level.

Prompt	Description	Parameter
Student Population	Select one or more student populations to display in the report.	p_Student Population
Student Cohort	Select one or more student cohorts to display in the report. NOTE: If the Student Cohort Active Ind=Yes, Student Cohort Report Ind=Yes, and the first term of the retention period falls within the student cohort begin and end term, then the student will be displayed in the report for the cohort selected.	p_Student Cohort
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Student Classification	Select one or more student classifications to display in the report.	p_Student Classification
Academic Period First Attended	Select an academic period to display only students who first attended the institution in that academic period.	p_Academic Period First Attended

Financial Aid prompts

The Financial Aid prompts are optional prompts that you can use to filter the report based on a student's financial aid statuses.

Prompt	Description	Parameter
Aid Applicant Ind	Select to filter the report based on a student's aid applicant status.	p_Aid Applicant Ind
FM Need Eligible Ind	Select to filter the report based on whether a student is eligible or ineligible for need.	p_FM Need Eligible Ind
FM Fully Met Need Ind	Select to filter the report based on whether or not a student's financial aid need is fully met.	p_FM Fully Met Need Ind
Financial Aid Offered Ind	Select to filter the report based on whether or not a student was offered financial.	p_Financial Aid Offered Ind
Financial Aid Paid Ind	Select to filter the report based on whether or not a student was paid financial aid.	p_Financial Aid Paid Ind

Student List Detail - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can click on one of the names to drill through to the Student Full Profile report. The following table specifies the drill-through parameter values for the report. These are the parameter values that need to be passed from the Student List Detail report to the Student Full Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass parameter value	p_Student Level
drill_Person_uid		Pass data item value	PERSON_UID

The Student List Detail report is also available as a drill-through report from the following reports:

- Academic Qualifications Impact on Retention to Graduation Trend
- Master Student Enrollment Trend

Refer to the sections describing those reports for detailed information about them and the drill-through definitions to this report.

Student List Faculty Feedback Detail report (New in 1.1)

This report provides the ability to identify a group of students based on multiple characteristics including retention risk characteristics based on a faculty course feedback session for an academic period.

The following picture illustrates this report.

Student List Faculty Feedback Detail

Fall 2012 - Fall 2012 Feedback 1

Selected Prompts

Show/Hide Categories

Academic Study

Academic Performance

Academic Qualification

Demographic

✓ Advisor

Show/Hide

Student	Student Status			t Student Status Academic Study			Academic Performance									
Name	Student Classification	Current Time Status	Registered Ind	Feedback Exist Ind	Program	College	Major	Degree	Campus	Academic Period GPA	Cumulative GPA	Academic Standing Begin	Academic Standing End	Total Credits Attempted	Total Credits Passed	Total Credits Earned
Andrew, Kim 200910115	Freshman	Half Time	Yes	No Feedback Exist	B.A. History	College of Arts & Science	History	Bachelor of Arts	Data Not Avail	4.000	4.000	Good Standing	Data Not Avail	6.00	6.00	6.00
Correll, Michele N00014077	Freshman	Half Time	Yes	No Feedback Exist	English	College of Arts & Science	English	Bachelor of Arts	Main		0.000	Good Standing	Data Not Avail	0.00	0.00	0.00
Correll, Thomas K. N00014074	Freshman	Half Time	Yes	No Feedback Exist	B.A. History	College of Arts & Science	History	Bachelor of Arts	Main		0.000	Good Standing	Data Not Avail	0.00	0.00	0.00
Montclair, Ronnie N00014034	Freshman	Half Time	Yes	Feedback Exist	Bachelor of Arts (B.A.)	College of Arts & Science	Communications	Bachelor of Arts	Main	2.571	2.571	Good Standing	Data Not Avail	7.00	7.00	7.00
North, Sharon 200405914	Senior	Half Time	Yes	No Feedback Exist	B.A. History	College of Arts & Science	History	Bachelor of Arts	Main	1.900	3.257	Good Standing	Data Not Avail	10.00	7.00	7.00
Spencer, Jessica 208091205	Freshman	Half Time	Yes	Feedback Exist	B.A. History	College of Arts & Science	History	Bachelor of Arts	Main	2.000	2.000	Good Standing	Data Not Avail	3.00	3.00	3.00

	A	.cademic Q	ualification	ıs		Demo	graphic		Advisor(s)	
Secondary School GPA	Secondary School Percentile	Highest ACT Composite	Highest SAT Combined	Post Secondary School (Latest) GPA	Post Secondary School (Latest) Transfer Credits	Gender	Race Category	Advisor Name	Advisor Type	Primary Advisor Ind
		0.0	0.0	2.000	0.00	Female	Data Not Avail	Bardel, Gregory	Biology Advisor	No
							Data Not Avail	Grimm, Aaron	Academic Counselor/Advisor	Yes
		0.0	0.0	0.000	0.00	Data Not Avail	Data Not Avail		Data Not Avail	Yes
		0.0	0.0	0.000	0.00	Data Not Avail	Data Not Avail		Data Not Avail	Yes
		0.0	0.0	2.570	0.00	Male	Data Not Avail	Garrison, Turner	Premed Advisor	Yes
3.750		0.0	1816.0	2.870	0.00	Female	Data Not Avail	Hyche, Serena	Academic Counselor/Advisor	Yes
3.980	99.00	0.0	0.0	2.000	0.00	Female	Data Not Avail	Garrison, Turner	Academic Counselor/Advisor	Yes

Report package

This report was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This report provides the information needed to answer this type of business question: What group or cohort of students should retention strategies focus on?

Student List Faculty Feedback Detail - report prompts

The prompt page is the entry point when you first select a report to run it. You select the desired values for required and optional prompts on the prompt page before you run the report. Some of the prompts may be grouped in categories. You can expand or collapse the display of some prompt groups. A (+) or (-) at the beginning of a prompt category name indicates that you can click that category heading to expand (show) or collapse (hide) the prompts in that group.

Selection prompts

Selection prompts provide the ability to filter and refine your report output. Selection prompts can include both required and optional prompts. An (*) indicates a required value.

Prompt	Description	Parameter
Academic Period*	Select an academic period to specify which period of data to display in the report.	p_Academic Period
Student Level*	Select a student level to specify which level of data to display in the report.	p_Student Level
Faculty Feedback Session*	Select a faculty feedback session to specify which session of data to display in the report.	p_Feedback Session

Academic Study prompts

The Academic Study prompts are optional prompts that you can use to filter the report based on the student's course of study.

Prompt	Description	Parameter
Program	Select one or more programs to display in the report.	p_Program
College	Select one or more colleges to display in the report.	p_College
Major	Select one or more majors to display in the report.	p_Major
Degree	Select one or more degrees to display in the report.	p_Degree
Campus	Select one or more campuses to display in the report.	p_Campus

Demographic prompts

These prompts are optional prompts that you can use to filter the report based on certain personal characteristics of a student.

Prompt	Description	Parameter
Gender	Select one or more genders to display in the report.	p_Gender
Citizenship Type	Select one or more citizenship types to display in the report.	p_Citizenship Type
Race Category	Select one or more race categories to display in the report.	p_Race Category
Veteran Category	Select one or more veteran categories to display in the report.	p_Veteran Category

Student Status prompts

The Student Status prompts are optional prompts that you can use to filter the report based on various statuses of a student.

Prompt	Description	Parameter
Enrolled Ind	Select to filter the report by students who are enrolled or not enrolled.	p_Enrolled Ind
Permit Registration Ind	Select to filter the report by students permitted or not permitted to register.	p_Permit Registration
Registered Ind	Select to filter the report by students who are registered or not registered.	p_Registratio n Ind
New Student Ind	Select to filter the report by students who are new or not new.	p_New Student Ind
Withdrawn Student Ind	Select to filter the report by students who have withdrawn or not withdrawn.	p_Withdrawn Ind
Graduated Ind	Select to filter the report by students who have been awarded.	p_Outcome Awarded Ind
Enrollment Status	Select to filter the report by a student's enrollment status.	p_Enrollment Status
Student Status	Select to filter the report by a student's status.	p_Student Status
Current Time Status	Select to filter the report by a student's current time status.	p_Current Time Status

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on aspects of the student's performance.

Prompt	Description	Parameter
Cum GPA	Select From and To values to define the range of cumulative GPA to filter students by for display in the report.	p_Cum GPA
Academic Period GPA	Select From and To values to define the range of academic period GPA to filter students by for display in the report.	p_Academic Period GPA
Total Credits Earned	Select From and To values to define the range of total earned credits to filter students by for display in the report.	p_Total Credits Earned

Prompt	Description	Parameter
Academic Standing Begin	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing Begin
Academic Standing End	Select the academic standing values that a student had at the beginning of the academic period.	p_Academic Standing

Student Groupings prompts

The Student Groupings prompts are optional prompts that you can use to filter the report based on the student's population, cohort, attribute and/or classification for the selected term and level.

Prompt	Description	Parameter
Student Population	Select one or more student populations to display in the report.	p_Student Population
Student Cohort	Select one or more student cohorts to display in the report. NOTE: If the Student Cohort Active Ind=Yes, Student Cohort Report Ind=Yes, and the first term of the retention period falls within the student cohort begin and end term, then the student will be displayed in the report for the cohort selected.	p_Student Cohort
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Student Classification	Select one or more student classifications to display in the report.	p_Student Classification
Academic Period First Attended	Select an academic period to display only students who first attended the institution in that academic period.	p_Academic Period First Attended

Financial Aid prompts

The Financial Aid prompts are optional prompts that you can use to filter the report based on a student's financial aid statuses.

Prompt	Description	Parameter
Aid Applicant Ind	Select to filter the report based on a student's aid applicant status.	p_Aid Applicant Ind
FM Need Eligible Ind	Select to filter the report based on whether a student is eligible or ineligible for need.	p_FM Need Eligible Ind
FM Fully Met Need Ind	Select to filter the report based on whether or not a student's financial aid need is fully met.	p_FM Fully Met Need Ind
Financial Aid Offered Ind	Select to filter the report based on whether or not a student was offered financial.	p_Financial Aid Offered Ind
Financial Aid Paid Ind	Select to filter the report based on whether or not a student was paid financial aid.	p_Financial Aid Paid Ind

Student List Faculty Feedback Detail - report composition overview

The report composition overview provides a high level introduction to specific Cognos features used to build this report. Use this information in combination with the Cognos documentation when making report modifications to meet an institution specific need.

Drill-through definitions

From this report, you can drill through to the Student Full Profile by Faculty Feedback report. The following table specifies the drill-through parameter values for the report. These are the parameter values that need to be passed from the Student List Faculty Feedback Detail report to the Student Full Profile by Faculty Feedback report for the drill-through to work properly.

Parameter	Required	Method	Value
drill_person_uid		Pass Data Item	PERSON_UID
p_Academic Period	X	Pass Parameter Value	p_Academic_Period
p_Student Level	X	Pass Parameter Value	p_Student Level

Advisee Feedback by Advisor Summary report (New in 1.1)

This report provides the information needed to answer business questions like: Which advisees have more than one course flagged for faculty feedback monitoring for the academic period?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- Feedback Session Description
- Primary Advisor Ind
- Advisor Type Description
- · Advisor Name

Athletic Team Faculty Feedback Detail report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- Which student athletes have been identified for faculty feedback monitoring?
- What feedback have these student athletes received?
- What is their course load and past academic performance?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- · Sport Description

Course Planning by Estimated Grade Threshold Summary report (New in 1.1)

This report provides information that supports your ability to identify all students who have an estimated grade of a specified value (for example a C) or below by a specific course section (CRN) for an academic period to evaluate course offerings for the next semester based on the number of students in jeopardy within a given course. You can use this report to answer the following types of business questions:

- Are additional courses needed?
- Is the maximum class size too large?
- Do the pre-requisites for the course need to be reevaluated?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

- Academic Period Description
- Feedback Session Description
- · Estimated Grade

Course Section Instructor Count by Course Dept Trend report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- How many instructors have been assigned to a single course?
- What has been the trend of instructor assignments for this course over the last two years?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- Course Department Description

Estimated Grade - Final Grade Comparison by Course Summary report (New in 1.1)

This report gives you the ability to compare the estimated grade to the final grade by CRN (Course). You can use this information to evaluate whether the appropriate faculty feedback issues and recommendations are being addressed at the correct time in the term. This can help you to ensure student improvement and success and make adjustments for future faculty feedback session times as needed.

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

- Academic Period Description
- Monitored Student Ind Description
- Estimated Grade
- Course Department Description
- Feedback Session Description

Estimated Grade - Final Grade Comparison by Instructor Summary report (New in 1.1)

This report gives you the ability to compare the estimated grade to the final grade by instructor. You can use this information to evaluate whether the appropriate faculty feedback issues and recommendations are being given by the instructor to ensure student improvement and success.

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

- Academic Period Description
- Monitored Student Ind Description
- Estimated Grade
- Feedback Session Description
- Primary Instructor Name
- Course Department Description

Estimated Grade - Final Grade Comparison by Student Summary report (New in 1.1)

This report gives you the ability to compare the estimated grade to the final grade by student. You can use this information to evaluate whether the appropriate faculty feedback issues and recommendations are being addressed at the correct time in the term to ensure student improvement and success.

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- Monitored Student Ind Description
- · Estimated Grade
- Course Department Description

Estimated Grade Dropped Course Evaluation Summary report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- How many students dropped a course after receiving an estimated grade of a specified value (for example a C) or below?
- Were there contributing factors to the students' action, such as past academic performance, course load, course registration overrides that might indicate this student was unprepared for the class?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- · Academic Period Description
- · Estimated Grade
- Registration Status Description
- Feedback Session Description

Faculty Feedback Session by Course Department Summary report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- How many students are being monitored?
- How many students have feedback?
- How many students are still missing feedback for courses within a department?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

- Academic Period Description
- Feedback Session Description
- Course Department Description

Faculty Feedback Session by Course Summary report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- How many students are being monitored?
- How many students have feedback?
- How many students are still missing feedback for courses?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- Feedback Session Description

Faculty Feedback Students Fall to Fall Retention by Diversity Trend report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- What is the year to year retention for students who have received faculty feedback?
- Have those students who received timely feedback been retained at a higher rate than those who did not?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- · Academic Period Description
- College Description

Instructional Method Assessment by Faculty Feedback Trend report (New in 1.1)

This report provides the ability to identify the percentage of students who have been flagged for monitoring for the last three academic periods by instructor, course, meeting day/time, and instructional method. You can use this information to answer the following types of business questions:

- Should I adjust an instructor's workload or assign a different instructor to the course in the future?
- Should I reduce the maximum enrollment for the course?
- Are students in a morning class having more issues than students in a later class?
- Is the instructional method appropriate for the course?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- Subject Description
- Course Identification

Instructor Course Load by Course Dept Trend report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- How many course sections is an instructor teaching for an academic period?
- What has been the course load trend for this instructor over the last two years?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- Course Department Description

Monitored Student Course Load Comparison by Student Attributes report (New in 1.1)

This report provides the information needed to answer this type of business question: What is the course load of students who have received faculty feedback compared to those students who are not being monitored?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- Feedback Session Description

Monitored Student Course Load Comparison Detail report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- Which instructors had more than five students per course flagged for faculty feedback monitoring for the last three academic periods?
- Is a faculty member being overloaded with at risk students?
- Is their an issue with the course and course requirements?
- Is there an issue with the instructor?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

• Academic Period Description

Monitored Student Ratio by Course Trend report (New in 1.1)

This report provides the ability to identify the percentage of students who have been flagged for monitoring for the last three academic periods by instructor, course, meeting day/time, and instructional method. You can use this information to answer the following types of business questions:

- Should I adjust an instructor's workload or assign a different instructor to the course in the future?
- Should I reduce the maximum enrollment for the course?
- Are students in a morning class having more issues than students in a later class?
- Is the instructional method appropriate for the course?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

You can choose to filter the report results by specifying values for any of the following report prompts when you run the report:

- Academic Period Description
- Course Department Description

Student Athlete Faculty Feedback Summary report (New in 1.1)

This report provides the information needed to answer the following types of business questions:

- Which student athletes have been identified for faculty feedback monitoring?
- What feedback have these student athletes received?
- What is their course load and past academic performance?

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

- Academic Period Description
- Sport Description
- Feedback Session Description

Student Faculty Feedback Detail report (New in 1.1)

This report provides a comprehensive report of all faculty feedback received by a population of students for the academic period or periods selected.

Report package

This report was built in Query Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Report prompts and filters

- Academic Period Description
- Feedback Session Description

Report types

There are several types of reports available. The name of each delivered report includes the type of report it is. For example, Enrollment by First Contact 5-Year Trend is a trend report, Funnel by Diversity Summary is a summary report, and so on. The following table describes the available report types.

Report Type	Description
Trend	Trend reports show changes in data over time. For example, the Five Year Admissions Trend report shows admissions rates for the past five years in a single chart allowing you to easily see trends over time.
Summary	Summary reports contain aggregated, summary numbers, counts, ratios or percentages. Usually summary reports display aggregated values grouped and sorted by a set of specific attributes such as Funnel Status, demographics, ranges of academic scores or diversity categories.
Detail	Detail reports include more levels of information related to recruitment and admissions performance measures, including trends, graphics, and details related to the recruitment and admissions lifecycle.
Ad hoc	Ad hoc reports can be created as needed by pulling into the report whatever fields/columns you need based on the information you want to track in the report.
Active	Active reports make use of the IBM Cognos Active Report features. Active report output is saved offline by the end user and provides highly interactive report features, such as in-column sorting, filtering, and report objects interaction. An effective and efficient way to use Active reports is to make use of the Cognos Schedule feature to schedule the run of these reports.

The delivered versions of Trend and Summary reports may contain graphic summaries and detailed information. The graphic displays provide a visual representation of content within each report. Graphic displays also help you identify important aspects of the report before looking at all the detail.

You can view reports using a web browser, save reports, e-mail reports to others, save and print them in PDF format, and save them in Excel or .csv format. Access to each report can be secured by the user roles set up for each user.

Access a report

During installation, the reports are typically installed in the [Performance product]/Reports folder where [Performance product] is the name the Performance product in which the report is delivered. You can access a report from either a dashboard or directly from the Public Folders or My Folders tabs.

Access a report from a dashboard

Each dashboard includes a list of reports.

- 1. Select a dashboard tab.
- 2. In the reports list on the left side of the window, click the folder that contains the report you want to run. If you don't know where the report is saved, use the search feature to find the report.
- **3.** Click the title of the report.
- **4.** Select values for any selection prompts if the report includes them.
- 5. Click Finish.

Access a report from a folder tab

The Public Folders tab includes a Reports folder where the Banner Student Retention Performance reports are stored. You can also save your customized reports to the My Folders directory.

- 1. Select either the **Public Folders** or **My Folders** tab.
- 2. Navigate to the report within the folder hierarchy. Reports are grouped into separate folders by business concepts.
- 3. Click the report name to open it.

If you don't know where a report is saved, go to a dashboard and search for the report using the Report Search feature.

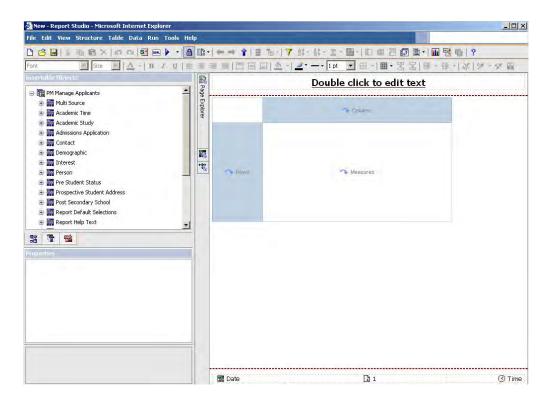
After you open a report, you can run, copy, save, email, or export it. Refer to the Banner Student Retention Performance Online Help for instructions on performing these tasks. You can also refer to the "Banner Student Retention Performance Business User Training Workbook," or the Cognos Report Studio or Query Studio documentation for more detailed information.

Reports

Report Studio

Report Studio is the Cognos Tool that you can use to create simple and complex reports. When you open Report Studio, you first select the data package and the template to use as the basis for a report. Report Studio then opens with the selected report template format showing you where to insert data.

In the example below, a crosstab report was selected. You can drag the data to use for rows and columns to the appropriate blue area of the report. You can drag the measures to the middle white section.



The Cognos Report Studio contains the following layout objects.

Object	Description
Menu bar	Links to additional tasks grouped into menus.
Toolbar	Two rows of icons allow you easy access to tasks related to building and formatting reports.

Object	Description
Insertable object pane	The Insertable Objects pane includes three tabs.
	The Source tab 🚼 displays in nested folders the data items included in the selected data package. Click the plus sign next to a data item to expand the data.
	The Data Items tab displays only the data items already included in the report.
	The Toolbox tab displays all the different types of objects you can add to a report.
Properties pane	The Properties pane lets you modify objects and data items.
Explorer bar	The Explorer bar separates the panes on the left from the work area on the right. It includes three buttons that can change the view from the default page to other report pages, or open the Query Explorer and Condition Explorer.
Work Area	The largest element on the screen is the work area. In Report Studio the data from your report is not visible as you are building the report. The column and rows of data display in the work area but you must run the report to see the actual data that will display.

Report prompts in Report Studio

Some reports include prompts. You can choose prompt values that determine the data to display in your report. If a report includes selection prompts, the prompt page opens when you click the report link.

An asterisk (*) indicates a required prompt.

The Report Studio reports use cascading prompts. Some prompt lists initially display only a label and no prompt values. This means that values for the empty prompt are dependent on your selections for a related prompt and will only be populated after you click the

Cascade button between the prompts. This technique improves performance because the query related to a dependent cascading prompt is not executed until its prompt dependency has been selected.

Reports

To select multiple prompt values, hold down the CTRL key on the keyboard and click another option. To select all the values for a prompt, click **Select All** below that prompt.

- Click **Next** to see additional prompts based on the prompts you already selected.
- Click **Finish** to run the report.

Execute prompt queries concurrently

Each prompt on a report executes a separate query to retrieve valid values from the database. When creating a report in Report Studio, you should set the execution method for prompts to be "Concurrent." This will cause the server to execute as many queries as it can at the same time when you are working with a report, which will improve performance time for the report.

Academic Period in trend reports

The delivered trend reports assume that the values for Academic Period are numeric in the format YYYYPP, where YYYY is the four-digit year and PP is the two-digit period, for example, 200810 or 199955. Due to the numeric assumption, you only need to select one Academic Period prompt value when running a trend report. The report will perform a calculation based on the selected Academic Period to determine a set number of previous years as well and retrieve data for those previous years.

Query Studio

Query Studio is the Cognos tool that allows non-technical users to create simple ad hoc reports to answer business questions. In Query Studio, you can view data, create reports, change the appearance of reports, and work with the report data.

Create a report in Query Studio

When you create a report in Query Studio, you are actually creating a query definition, which is a specific set of instructions for extracting particular data from the database. You can create a report from scratch by inserting items from the data source into an empty report. You can also create a new report by opening an existing report, changing it, and saving it using another name.

Before you use Query Studio, answer the following questions:

- What business question do you want to answer?
- Which type of report best answers the business question, a crosstab report or a chart?
- Who is the target audience?

What data items and calculations do you need?

Use these steps to guide you in creating Query Studio reports. Refer to the Cognos Connection Query Studio user guide for more detailed information about using Query Studio.

- 1. Create the report.
- 2. Add data.
- **3.** Save the report.
- Run the report.

You can work with the data that appears in the report and change the layout.

Report templates

Delivered reports use a template to give them a common look and feel. The following two report templates are delivered with the product in the Templates folder.

- Template used for reports created in Cognos Report Studio
- **Template Query Studio** used for reports created in Cognos Query Studio.

In addition, reports built in Report Studio use the Layout Library in conjunction with the Template to make it easier to maintain a common look across all reports.

Layout Library

Typically, you want some parts of your reports to share a common look and feel. For example, you may want to use the same header and footer across many or all of your reports. In Report Studio you can use the Layout Library and the Template to achieve a common look across multiple reports. The Layout Library and the Template are two reports delivered with the Cognos components in the Templates folder.



Note

You cannot use the Layout Library with reports created in Query Studio. Use the Template - Query Studio template for reports created in Query Studio.

The Layout Library is basically a report created in Report Studio that includes header, footer, and prompt components. These common components are defined once in the Layout Library then used in the Template. When you change a component in the library, the change will be carried through to the Template and all Report Studio reports based on that template.

Reports

Page Header Layout Library components

The Layout Library includes three page headers: Standard Page Header, Standard Page 2 Header, and Standard Page 3 Header. The Template uses the Standard Page Header as the heading on reports. The additional header components exist for use in reports that have multiple reports embedded in one report. For example, the Funnel Status by Quality Summary report allows you to view information by current funnel counts or total funnel counts. This report uses the different header components to create unique headers for both versions of the report.

When delivered the three headers are the same and look like the following illustration. You can customize each header component differently to create multiple report headers.

Standard Page Header:		
ellucian.	F-	<%Today()%> Page <%PageNumber()%>
	<enter here="" title=""></enter>	
	<enter here="" subtitle=""></enter>	

Page Footer Layout Library components

The Layout Library includes three page footers: Standard Page Footer, Standard Page 2 Footer, and Standard Page 3 Footer. The Template uses the Standard Page Footer as the footer on reports. The additional footer components exist for use in reports that have multiple reports embedded in one report. For example, the Funnel Status by Quality Summary report allows you to view information by current funnel counts or total funnel counts. This report uses the different footer components to create unique footers for both versions of the report.

When delivered the three footers are the same and look like the following illustration. You can customize each footer component differently to create multiple report footers.

Ctandard Daga Fastari		
Standard Page Footer:		
Run by: Place Cognos User Name here	<%ReportPath()%	ς.
Railby, Flace Cognos oser Manie Here	Vaccourt acity to	_

Prompt Page Header Layout Library component

The Template uses the Standard Prompt Page Header as the heading for the prompt page on a report.

<enter here="" title=""></enter>	
ellucian.	
Standard Prompt Page Header:	

Prompt Page Info Layout Library component

The Template includes the Standard Prompt Page Info component after the heading on the prompt page in a report.

Standard Prompt Page Info:		
Purpose:	This report illustrates	
Selection Prompts:	An (*) indicates required values. To cascade values to other prompts, click located between the prompts. Select the desired values and click Finish.	
Help:	<use contact="" for="" global="" here="" information="" parameter=""></use>	
	To exit the prompt page without running the report, click Cancel.	

Change a component in the Layout Library

The components within the Layout Library include report information like report title, date, page number, user name, and institution logo. You can rearrange, edit or delete any piece of information within a component. It is best to make changes directly in the components of the library so that report elements remain consistent across reports. You change a component once in the Layout Library and the change is carried through to every report that uses that component including the Template.

The following steps offer a general overview of the Layout Library components and how you might change them. Refer to the Cognos Report Studio Help and the Report Studio Professional Authoring User Guide for more information about working in Report Studio and making changes to reports including the Layout Library.

- 1. Save a copy of the delivered Layout Library with a new name, for example, Layout Library Delivered.
- 2. Perform the remaining steps on the original Layout Library file.

You must make changes to the original Layout Library file because the Template uses that file as the source for its components. Keep in mind that you have the copy of the Layout Library file that you created in the previous step in case you need to revert back to that delivered version of the library file.

- **3.** Open the Layout Library.
 - **3.1.** In Cognos Connection, navigate to **Public Folders>[Performance Product]>Templates**.

This is the folder where templates were installed. If your institution used different folder names during installation, ask the Database Administrator where the templates were installed.

3.2. Click Layout Library.

The Layout Library displays. It includes the following components:

Layout Library Component	How to use it
Standard Page Header	The Template uses the Standard Page Header as the heading a report.
Standard Page 2 Header	The Standard Page 2 Header allows you to include a unique header for a second report embedded within a report.
Standard Page 3 Header	The Standard Page 3 Header allows you to include a unique header for a third report embedded within a report.
Standard Page Footer	The Template uses the Standard Page Footer as the footer on a report.
Standard Page 2 Footer	The Standard Page 2 Footer allows you to include a unique footer for a second report embedded within a report.
Standard Page 3 Footer	The Standard Page 3 Footer allows you to include a unique footer for a third report embedded within a report.

Layout Library Component	How to use it
Standard Prompt Page Header	The Template uses the Standard Prompt Page Header as the heading for the prompt page on a report.
Standard Prompt Page Info	The Template includes the Standard Prompt Page Info component after the heading on the prompt page in a report.

4. Review the components of the Layout Library to determine what changes you might want to make. Refer to the sections <u>"Page Header Layout Library components"</u>, <u>"Page Footer Layout Library components"</u>, <u>"Prompt Page Header Layout Library component"</u>, and <u>"Prompt Page Info Layout Library component"</u> for more information about the Layout Library components.

Some changes you might want to make include:

- Remove an item from a component.
- Move an item from one component to another, for example, move the page number from the headers to the footers.
- Change the font, font size, color or placement of any of the text items, for example, titles, date, and page number.
- Add other information items to a component.
- Add graphics to a component.
- Remove the logo from the header component.

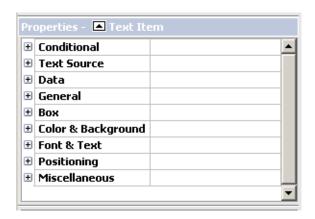


Do not change the logo in the Layout Library. The source for the logo in the library is the header_logo.jpg file that is typically stored in the cognos/pmimages folder. If you want to change the actual logo (.jpg file) that displays on reports, copy the desired .jpg of your logo to the header_logo.jpg. file in the pmimages folder.

Reports

5. Edit items in the Layout Library components as needed.

Each item in a component of the Layout Library has several properties associated with it that you can change. Click on an item to select it then use the Properties pane to make changes to the selected item. The following picture illustrates the aspects of a text item that you can control.





Refer to the Cognos Report Studio Help and the Report Studio Professional Authoring User Guide for more specific information about how to change items in the Layout Library.

6. Choose **File>Save** to save the changes you made to the Layout Library.

After you have completed all changes to the Layout Library and saved it, the Template and any reports based on the template will reflect the changed components of the Layout Library.

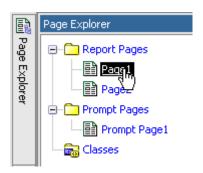
Apply Layout Library components to an existing report

You may have a report that you created without using a template that you later want to update to use the components of a template. Use the following steps to update reports to use the Layout Library components.

Basically, you will insert components from the Layout Library into the headers and footers of a report. Then you need to adjust the components to replicate the existing headers and footers. Finally you will delete the original header and footer information.

- 1. In Report Studio, open the report that needs to have the library components applied.
 - **1.1.** In Cognos Connection, navigate to the folder location of the report.
 - **1.2.** Click the Report Studio icon associated with the report to open it in Report Studio.

- 2. Replace the existing header information on a Report Page with the Standard Page Header component from the Layout Library.
 - **2.1.** Place the cursor over the Page Explorer bar and select **Report Pages>Page1**.



- **2.2.** Click the Insertable Objects pane Tools tab **t** to select it.
- **2.3.** Scroll the Insertable Objects pane until you find the Layout Component Reference.
- **2.4.** Click the Layout Component Reference and drag it onto the report below the report header.
- **2.5.** Select **Another report** and click
- **2.6.** Navigate to the folder with the Layout Library. During installation this is the folder path **Public Folders/[Performance Product]/Templates**. If your institution used different folder names during installation, ask the Database Administrator where the templates were installed.
- **2.7.** Choose the **Layout Library** and click **Open**.
- **2.8.** Select the **Standard Page Header** component and click **OK**.

The selected component is inserted into the report.

- **2.9.** Change items of the Standard Page Header component copied from the Layout Library so that they reflect the way that component was defined in the report. You can change only the report title and subtitle within the report.
 - **2.9.1.** Select the Standard Page Header component that you just inserted into the report.

Reports

2.9.3. Choose to override both the Report Title and the Report Subtitle and click **OK**.

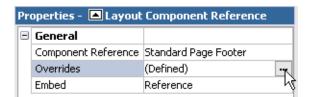


Even if you do not want to include a subtitle on the report, you need to override the existing subtitle to remove the default words <Enter Subtitle Here>.

- **2.9.4.** From the Insertable Objects pane Tools tab ******, click and drag a Text Item over to the Title object.
- **2.9.5.** Enter a Title for the report and click **OK**.
- **2.9.6.** From the Insertable Objects pane Tools tab , click and drag a Text Item over to the Subtitle object.
- **2.9.7.** Enter a Subtitle for the report and click **OK**. If you do not want a subtitle on the report, enter a space.
- **2.10.** Delete the header items replicated by the component that already existed in the report.
- **3.** Replace the existing footer information on a Report Page with the Standard Page Footer component from the Layout Library.
 - 3.1. Click the Insertable Objects pane Tools tab 🍯 to select it.
 - **3.2.** Scroll the Insertable Objects pane until you find the Layout Component Reference.
 - **3.3.** Click the Layout Component Reference and drag it onto the report below the report footer.
 - **3.4.** Select **Another report** and click
 - **3.5.** Navigate to the folder with the Layout Library. During installation this is the folder path **Public Folders/[Performance Product]/Templates**. If your institution used different folder names during installation, ask the Database Administrator where the templates were installed.
 - **3.6.** Choose the **Layout Library** and click **Open**.
 - 3.7. Select the Standard Page Footer component and click OK.

The selected component is inserted into the report.

- **3.8.** Add the Cognos User Name to the Standard Page Footer component copied from the Layout Library. You can change only the Cognos User Name item within the footer of a report.
 - **3.8.1.** Select the Standard Page Footer component that you just inserted into the report.

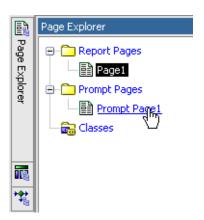


3.8.3. Choose to override the Cognos User Name and click **OK**.

The Cognos User Name item in the footer changes to indicate that you can now drop a different element into that item.

- 3.8.4. In the Insertable Objects pane Source tab 33, locate the Cognos User Name data item in the Report Help Text query subject.
- **3.8.5.** Click and drag the **Cognos User Name** item to the object next to "Run by:" in the report footer.
- **3.8.6.** Click **OK** at the prompt. This lets you know that a new query was created to insert the Cognos user name on the report.
- **3.9.** Delete the footer items replicated by the component that already existed in the report.
- 4. Repeat steps 2 through 3 for each of the Report Pages in the report.

- **5.** Replace the existing Prompt Page header information with the Standard Prompt Page Header component from the Layout Library.
 - **5.1.** Place the cursor over the Page Explorer bar and select **Prompt Page1**.



- **5.2.** From the Insertable Objects pane Tools tab ******, click the Layout Component Reference and drag it onto the report below the report header.
- **5.3.** Select **Another report** and click
- **5.4.** Navigate to the folder with the Layout Library. During installation this is the folder path **Public Folders/[Performance Product]/Templates**. If your institution used different folder names during installation, ask the Database Administrator where the templates were installed.
- **5.5.** Choose the **Layout Library** and click **Open**.
- **5.6.** Select the **Standard Prompt Page Header** component and click **OK**.

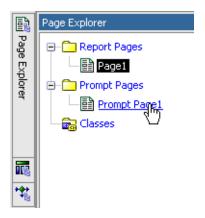
The selected component is inserted into the report.

- **5.7.** Select the Standard Prompt Page Header component that you just inserted into the report.

5.9. Choose to override the Prompt Page Title and click **OK**. The Prompt Page Title is the only item you can change.

The heading information changes to indicate that you can now drop a different element into the title item.

- **5.10.** From the Insertable Objects pane Tools tab **16.**, click and drag a Text Item over to the title item.
- **5.11.** Enter a Title for the report and click **OK**.
- **6.** Replace the existing Prompt Page information with the Standard Prompt Page Info component from the Layout Library.
 - **6.1.** Place the cursor over the Page Explorer bar and select Prompt Page 1. (You may have already done this in step <u>5.1</u>.)



- **6.2.** From the Insertable Objects pane Tools tab **\(\frac{1}{2} \)**, click the
 - Layout Component Reference and drag it onto the report below the existing report information.
- **6.3.** Select **Another report** and click
- **6.4.** Navigate to the folder with the Layout Library. During installation this is the folder path **Public Folders/[Performance Product]/Templates**. If your institution used different folder names during installation, ask the Database Administrator where the templates were installed.
- **6.5.** Choose the **Layout Library** and click **Open**.
- **6.6.** Select the **Standard Prompt Page Info** component and click **OK**.

The selected component is inserted into the report.

Reports

- **6.7.** Select the Standard Prompt Page Info component that you just inserted into the report.
- **6.8.** In the Properties pane, click in the cell to the right of the Overrides cell then
- **6.9.** Choose to override the Purpose Definition and the Global Contact Info Parameter and click **OK**. You can change only the report purpose and the help contact information.

The Purpose and Help fields change to indicate that you can now drop a different element into each item.

- **6.10.** From the Insertable Objects pane Tools tab "" , click and drag a Text Item over to the purpose item.
- **6.11.** Enter a purpose that describes the report and click **OK**.
- **6.12.** In the Insertable Objects pane Source tab 33, locate the **General Help Text** data item in the Report Help Text query subject.
- **6.13.** Click and drag the **General Help Text** item to the object next to "Help" on the prompt page.
- **6.14.** Click **OK** at the prompt. This lets you know that a new query was created to insert the General Help Text on the report.

Note

The General Help Text is a parameter that you define during installation. Typically, it will include general contact information for your institution's help desk or other help resource. If you do not want to use the General Help Text item in the Help field on the prompt page, you can insert a Text Item instead then define the text item with help information specific to the report.

7. Choose **File>Save** to save the changes you made to the report.

Template

The reports delivered with any of the Performance products that were created in Report Studio use the delivered template named "Template". Using a template to develop reports lets you apply a common look and feel to all reports.

When you create a report in Report Studio you can choose to use the delivered Template or another customized template or your own. The features of that template become the basis of the report. Any changes you make to a template will be carried through to the reports that use the template. That way you only need to make changes once.

The Template uses components from the Layout Library to make adjustments to the common look and feel easier over time. If you want to change a component of the Template, you should actually change that component in the Layout Library to ensure that common formats are applied consistently across all of the reports at your institution. See the section "Layout Library" for more details.

Create a new template

Most of the time you will want to make changes to the Template by making changes to the components in the Layout Library. This approach will ensure that common formats are applied consistently across all of the reports at your institution.

If you want to create another template, for use by a particular department for example, you will need to copy and change the Template.

- 1. Copy the Template and give it a new name.
- 2. Open the new template in Report Studio.
- **3.** Edit components of the Template as desired.
- **4.** Choose **File>Save** to save the changes you made to the Template.

Create a report in Report Studio using the Ellucian Template

When you create a new report, it is best to begin with a template. Using a template as the basis for a new report allows you to keep components like headers and footers consistent across all of the reports created at your institution. The Performance products are delivered with a base template named **Template**. The following instructions describe how to create a new report based on the Template. If your institution has developed its own

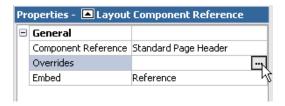
templates, you can follow these instructions substituting your institution's template and its components where appropriate.

- 1. Launch Report Studio.
 - 1.1. In Cognos Connection, click Launch
 - **1.2.** Select **Report Studio**.
- **2.** Select the package on which you want to base the report.
 - You can select a package from the list of **Recently used packages** or
 - You can navigate to a package in the **List of all packages** area.
- 3. Select **Create new** to create a new report based on the existing template.
- 4. Select the **Existing** folder and click **OK**.
- 5. In the **Look in** list, navigate to the location where the Template is located. At installation, this is the **Public Folders/[Performance Product]/Templates** folder. If your institution has created its own template, locate that template instead.
- **6.** Select the **Template** and click **Open**.

A new report opens using the Template. The report includes:

- One report page with the Standard Page Header at the top followed by two parameter placeholders.
- One prompt page with the standard Prompt Page Header at the top followed by the Standard Prompt Page Info component.
- **7.** Change heading information on report Page1. You can change only the report title and subtitle within the report.
 - **7.1.** Select the heading component on Page1 of the report.





7.3. Choose to override both the Report Title and the Report Subtitle and click **OK**.



Even if you do not want to include a subtitle on the report, you need to override the existing subtitle to remove the default words <Enter Subtitle Here>.

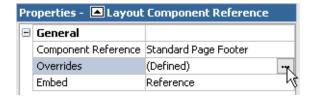
The heading information changes to indicate that you can now drop a different element into the title and subtitle items.



- **7.4.** From the Insertable Objects pane Tools tab , click and drag a Text Item over to the Title object.
- **7.5.** Enter a Title for the report and click **OK**.
- **7.6.** From the Insertable Objects pane Tools tab , click and drag a Text Item over to the Subtitle object.
- **7.7.** Enter a Subtitle for the report and click **OK**. If you do not want a subtitle on the report, enter a space.
- **8.** Add parameters to the report.

- **9.** Add the Cognos User Name to the footer on the report Page 1. You can change only the Cognos User Name item within the footer of a report.
 - **9.1.** Select the footer component on Page1 of the report.





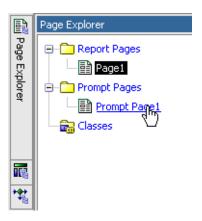
9.3. Choose to override the Cognos User Name and click **OK**.

The Cognos User Name item in the footer changes to indicate that you can now drop a different element into that item.



- **9.4.** In the Insertable Objects pane Source tab 33, locate the Cognos User Name data item in the Report Help Text query subject.
- **9.5.** Click and drag the **Cognos User Name** item to the object next to "Run by:" in the report footer.
- **9.6.** Click **OK** at the prompt. This lets you know that a new query was created to insert the Cognos user name on the report.

- **10.** Change heading information on the prompt page. You can change only the Prompt Page Title.
 - **10.1.** Place the cursor over Page Explorer bar and select Prompt Page 1.



10.2. Select the heading component on Prompt Page 1 of the report.

ellucian.

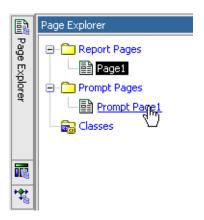
<Enter Title Here>

- **10.4.** Choose to override the Prompt Page Title and click **OK**.

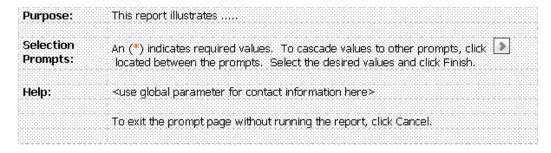
The heading information changes to indicate that you can now drop a different element into the title item.

- **10.5.** From the Insertable Objects pane Tools tab **6.5.** , click and drag a Text Item over to the title item.
- **10.6.** Enter a Title for the report and click **OK**.

- **11.** Change introductory information on Prompt Page1. You can change only the report purpose and the help contact information.
 - **11.1.** Place the cursor over Page Explorer bar and select Prompt Page1. (You may have already done this in step <u>10.1</u>.)

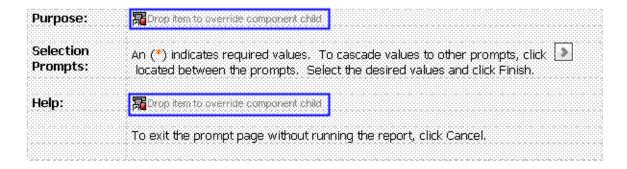


11.2. Select the prompt page information component on Prompt Page1.



11.4. Choose to override the Purpose Definition and the Global Contact Info Parameter and click **OK**.

The Purpose and Help fields change to indicate that you can now drop a different element into each item.



- **11.5.** From the Insertable Objects pane Tools tab **11.5.** rom the Insertable Objects pane Tools tab **11.5.** click and drag a Text Item over to the purpose item.
- **11.6.** Enter a purpose that describes the report and click **OK**.
- 11.7. In the Insertable Objects pane Source tab 33, locate the General Help Text data item in the Report Help Text query subject.
- **11.8.** Click and drag the **General Help Text** item to the object next to "Help" on the prompt page.
- **11.9.** Click **OK** at the prompt. This lets you know that a new query was created to insert the General Help Text on the report.



The General Help Text is a parameter that you define during installation. Typically, it will include general contact information for your institution's help desk or other help resource. If you do not want to use the General Help Text item in the Help field on the prompt page, you can insert a Text Item instead then define the text item with help information specific to the report.

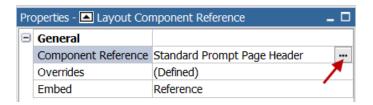
12. Add selection prompts to Prompt Page 1.

Change a template used by a report

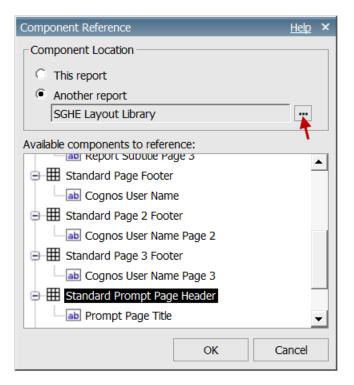
You may want to change the template that a report uses. You do this by applying a different template to the report.

- 1. Open a report in Report Studio.
- 2. Access the Prompt page.

- 3. Select the Header element in the report and change the Component Reference to point to the desired template.
 - **3.1.** In the Properties panel, select the Component Reference value by clicking the ... button.



3.2. In the Component Reference window, click the ... button next to the Another report field and navigate to find the template that you want to use.



- **3.3.** Click **Open** to select the template.
- **3.4.** Click **OK** to apply the new template to that component.

Template - Query Studio

When you create a report in Query Studio, you will apply a template, typically the Template - Query Studio template, which is delivered with the Performance products. The

report gets its formatting from the template that you apply, which defines the look of the report. When you modify a Query Studio template, you need to reapply the changed template to existing Query Studio reports that use the template for the changes to take effect in each report.

The following picture illustrates the Template - Query Studio template that is delivered with the Performance products.

Total	<%Today()%>
ellucian	<%Today()%> Page <%PageNumber()%>
D	ouble-click to edit text
	Double-click to edit text
	P Double-click to edit text

Apply a template to a Query Studio report

You can apply a template to a new or existing report created in Query Studio. Applying a template to a report gives you the ability to apply a standard look to all of the reports you develop.

- 1. Navigate to the reports folder. By default this is the **Public Folders>[Performance product]>Reports** folder where [Performance product] is the name the Performance product in which the report is delivered. If your institution customized the installation process, the reports may be stored in a different folder
- 2. Click the **Open with Query Studio** icon associated with the report you want to open.
- 3. Click Change Layout on the left pane.
- 4. Click Apply Template.
- **5.** Select the **Apply a template** radio button.
- **6.** Click the **Select a template** link.
- 7. Locate the folder where templates are stored. Typically this is **Public Folders> Public Folders>[Performance product]>Templates** where [Performance product] is the name the Performance product in which the report is delivered.
- **8.** Select the **Template Query Studio** template.

9. Click OK.

- **10.** Check that the correct template is selected.
- **11.** Click **OK**.
- **12.** Save the report.

Report timing

When you run a report the time it takes to return the result data for the report will vary. Some reports may take longer to complete depending on the nature of the report, the number of measures and attributes the report includes, and the size of the database the report is run against.

It is important to consider how to best use reports. For example, a detail report that attempts to return information for thousands of people will take longer than a summary report for the same number of people. You may want to structure reports so that they return thousands of records at the summary level and then provide drill through to specific detail areas.

You can schedule a report to run at a time when the system has less activity, for example, during the night. You may want to schedule reports that take longer to complete to run during the night.

4 Cubes

A cube is a precalculated set of data based on a single SQL query. The data model in the IBM Cognos Framework Manager presentation layer is the source for cube data. After you load and publish a cube, it contains data from the database including pre-defined facts (measures or calculated values) and dimensions (attributes or descriptions). Once data items are loaded, you can then rearrange and reformat them in a cube to answer multiple business questions.

Data stored within a cube is presorted and pre-aggregated as defined by each intersection of a fact and a dimension or set of dimensions. This offers you faster data retrieval and more robust analysis capabilities when building reports. This is a benefit when compared to using typical relational database structures for reporting.

The cubes delivered with the performance products are defined using IBM Cognos Transformer. The complete design of a cube includes measures, attributes, and hierarchies, along with their associated data sources. After a cube is defined, you can perform the following cube operations in Cognos:

- Run Cognos Extract, Translate and Load (ETL) processes to load the Cognos cube (these are equivalent to Oracle Warehouse Builder (OWB) ETLs)
- Define relationships within your data warehouse

• Pre-aggregate the measures presented to users within the cubes

Each cube is delivered with a baseline cube report that gives you a default view of the cube data. You can use Analysis Studio, Report Studio or Query Studio to create reports based on the cube data and analyze your business performance. This analysis allows you to answer many questions that assess progress toward your institution's business goals and objectives.

The powerful, robust nature of cubes makes them work best with the IBM Cognos Reporting Tool Analysis Studio. Analysis Studio is ideal for doing multidimensional analysis and exploring large data sources to generate trend and analytical types of reports. Cubes are ideally used to quickly analyze and identify patterns by slicing and dicing the measures by many attributes and combinations of attributes. Once patterns are isolated, our details like Query Studio or Report Studio may be better used to look at more detail data.

Cubes for Banner Student Retention Performance

The Cognos interface provides a predefined descriptive view of database information that would otherwise require some understanding of a database query language. You can use the PM Student Engagement Analysis cube in the Cognos Analysis Studio to analyze the data defined in the cube and to answer multiple business questions when using the Student Retention Performance product.

You can generate multiple reports from the PM Student Engagement Analysis cube to view and analyze the data gathered in the cube.

PM Student Engagement Analysis Cube

You can use the PM Student Engagement Analysis cube to determine student retention headcounts and rates from like or sequential academic periods, by the number of interactions or other institution engagements, saved by an event date for an engagement period. You can use different combinations of demographic and academic study attributes to analyze the number of engagements and their impact on retention for different groups of students.

This cube and the associated sample cube reports are based on the Snapshot PM Analyze Student Engagement business concept and they limit data based on the engagement period selected when that snapshot data is loaded.

The cube includes, but is not limited to, the following measures:

- Interaction Count
- · Activity Count
- Student Headcount
- Enrolled Headcount
- · Registered Headcount
- Student Not Registered Headcount
- · Withdrawn Headcount
- · Withdrawn Rate
- Graduated Headcount
- Student Retention (Like) Measures
- Retention within Student Level (Like)

- Retention within College (Like)
- Retention within Program (Like)
- Student Retention (Sequential) Measures
- Retention within Student Level (Sequential)
- Retention within College (Sequential)
- Retention within Program (Sequential)

This cube includes, but is not limited to, the following information:

- Time elements event, engagement period, retention period (like and sequential)
- Retention status (like or sequential) overall and within a student level, program, or college
- Demographic information gender, minority, citizenship, and traditional
- Types of engagement interactions, activities, athletics, and advisor assignments
- Academic study information student level, program of study, college, degree, and major
- Academic performance cumulative GPA (range and threshold), academic standing

Cube business questions

This cube enables you to answer the following types of business questions:

- 1. Does the number of engagements impact the retention rate for like or sequential academic periods?
- **2.** Do engagements during an engagement period influence the retention within a program or college?
- 3. What are the attributes of the students who are retained during an engagement period?

PM Engagement Analysis Cube Retention Like Report

The PM Engagement Analysis Cube Retention Like report provides insights into the student retention (like) headcounts and rates by retention period and the number of interactions, activities, and advisors. The headcounts and rates include the overall institution, within student level and college.

The following image displays the report.

	2000-	2001			1999-	-2000)		All Ac	ademic Tim	e		Fall 2	000 to	Fall 20	01	Fall 19	99 to	Fall 2	000	All Retention Period (Like)			
	Septer	Oct	Nov	Total	Sept	Oc	t Nov	Total	Sept	October	November	Total	Septe	Octo	Nove	Tot	Septi	Octo	Nove	Total	Septe	October	November	Total
Student Headcount	0	1	2	2	1	1	1	1	1	2	3	3	0	1	2	2	1	1	1	1	1	2	3	3
Enrolled Headcount	0	1	2	2	0	0	0	0	0	1	2	2	0	1	2	2	0	0	0	0	0	1	2	2
Registered Headcount	0	1	2	2	0	0	0	0	0	1	2	2	0	1	2	2	0	0	0	0	0	1	2	2
Student Not Registered Headcount	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	1	1	1	1	1	1	1	1
Withdrawn Headcount	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawn Rate	/0	#	##	###	/0	#	#	/0	/0	0.00%	0.00%	####	/0	##	###	#	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Graduated Headcount	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Interaction Count	0	1	2	2	1	1	1	1	1	2	3	3	0	1	2	2	1	1	1	1	1	2	3	3
Activity Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Advisor Count	0	1	2	2	1	1	1	1	1	2	3	3	0	1	2	2	1	1	1	1	1	2	3	3
Retention Headcount (Like)	0	1	2	2	0	0	0	0	0	1	2	2	0	1	2	2	0	0	0	0	0	1	2	2
Retention Rate (Like)	/0	#	##	###	/0	#	#	/0	/0	#####	######	####	/0	##	###	#	/0	/0	/0	/0	/0	#####	100.00%	100.00%
Non Persister Headcount (Like)	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	1	1	1	1	1	1	1	1
Non Persister Rate (Like)	/0	#	##	###	/0	#	#	/0	/0	#####	50.00%	####	/0	##	###	#	/0	/0	/0	/0	/0	#####	50.00%	50.00%
Excluded Headcount (Like)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Retention Headcount within Student Level (Like)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Retention Rate within Student Level (Like)	/0	#	##	###	/0	#	#	/0	/0	0.00%	0.00%	####	/0	##	###	#	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Non Persister Headcount within Student Level (Like)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Non Persister Rate within Student Level (Like)	/0	#	##	###	/0	#	#	/0	/0	0.00%	0.00%	####	/0	##	###	#	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Retention Headcount within College (Like)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Retention Rate within College (Like)	/0	#	##	###	/0	#	#	/0	/0	0.00%	0.00%	####	/0	##	###	#	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Non Persister Headcount within College (Like)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Non Persister Rate within College (Like)	/0	#	##	###	/0	#	#	/0	/0	0.00%	0.00%	####	/0	##	###	#	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Retention Headcount within Program (Like)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Retention Rate within Program (Like)	/0	#	##	###	/0	#	#	/0	/0	0.00%	0.00%	####	/0	##	###	#	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Non Persister Headcount within Program (Like)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Non Persister Rate within Program (Like)	/0	#	##	###	/0	#	#	/0	/0	0.00%	0.00%	####	/0	##	###	#	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%

PM Engagement Analysis Cube Retention Sequential Report

The PM Engagement Analysis Cube Retention Sequential report provides insights into the student retention (sequential) headcounts and rates by retention period and the number of interactions, activities, and advisors. The headcounts and rates include the overall institution, within student level and college.

The following image displays the report.

	2000-200)1	1999-	2000			All Ac	All Academic Time Fall 2000 to				2000 to	Fall 20	001	Fall 199	9 to Fa	all 2000		All Retention Period (Like)			
	November	Total	Sept	e Oct	x Nove	Total	Sept	October	November	Total	Sept	Octo	Nove	Total	Septer	Octo	Nover	Total	Septe	October	November	Total
Student Headcount	2	2	1	1	1	1	1	2	3	3	0	1	2	2	1	1	1	1	1	2	3	3
Enrolled Headcount	2	2	0	0	0	0	0	1	2	2	0	1	2	2	0	0	0	0	0	1	2	2
Registered Headcount	2	2	0	0	0	0	0	1	2	2	0	1	2	2	0	0	0	0	0	1	2	2
Student Not Registered Headcount	0	0	1	1	1	1	1	1	1	1	0	0	0	0	1	1	1	1	1	1	1	1
Withdrawn Headcount	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	c
Withdrawn Rate	0.00%	####	/0	/0	/0	/0	/0	0.00%	0.00%	###	/0	===	===	####	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Graduated Headcount	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(
Interaction Count	2	2	1	1	1	1	1	2	3	3	0	1	2	2	1	1	1	1	1	2	3	3
Activity Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(
Advisor Count	2	2	1	1	1	1	1	2	3	3	0	1	2	2	1	1	1	1	1	2	3	3
Retention Headcount (Sequential)	2	2	0	0	0	0	0	1	2	2	0	1	2	2	0	0	0	0	0	1	2	- 2
Retention Rate (Sequential)		****	/0	/0	/0	/0	/0	****	*****	###	/0	###	===	****	/0	/0	/0	/0	/0	*****	100.00%	100.00%
Non Persister Headcount (Sequential)	0	0	1	1	1	1	1	1	1	1	0	0	0	0	1	1	1	1	1	1	1	1
Non Persister Rate (Sequential)	0.00%	****	/0	/0	/0	/0	/0	****	50.00%	###	/0	===	===	****	/0	/0	/0	/0	/0	*****	50.00%	50.00%
Excluded Headcount (Sequential)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(
Retention Headcount within Student Level (Sequent	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(
Retention Rate within Student Level (Sequential)	0.00%	####	/0	/0	/0	/0	/0	0.00%	0.00%	###	/0	===	===	####	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Non Persister Headcount within Student Level (Sequ	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Non Persister Rate within Student Level (Sequential)	0.00%	####	/0	/0	/0	/0	/0	0.00%	0.00%	###	/0	===	===	####	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Retention Headcount within College (Sequential)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	C
Retention Rate within College (Sequential)	0.00%	####	/0	/0	/0	/0	/0	0.00%	0.00%	###	/0	===	===	####	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Non Persister Headcount within College (Sequential)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	O
Non Persister Rate within College (Sequential)	0.00%	****	/0	/0	/0	/0	/0	0.00%	0.00%	###	/0	###	===	####	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Retention Headcount within Program (Sequential)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(
Retention Rate within Program (Sequential)	0.00%	####	/0	/0	/0	/0	/0	0.00%	0.00%	###	/0	###	###	####	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%
Non Persister Headcount within Program (Sequential	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(
Non Persister Rate within Program (Sequential)	0.00%	####	/0	/0	/0	/0	/0	0.00%	0.00%	###	/0	===	===	####	/0	/0	/0	/0	/0	0.00%	0.00%	0.00%

Load and publish cubes

The load process generates a cube using the data that is current in the warehouse database at the time of the load. This cube file is a Cognos-proprietary object with a .mdc extension. It is referred to as a PowerCube. You can then publish the .mdc file to the Cognos BI server. You can load all the cubes at the same time or one at a time.

Load individual cubes

You may want to load individual cubes rather than all the cubes.

To load individual cubes, perform the following steps.

- 1. Open script buildAPMCube (UNIX) or buildAPMCube.bat (Windows).
- **2.** Delete the comment indicator:
 - (UNIX) Delete the '#' (number sign) comment indicator in front of each individual cube you want to load.
 - (Windows) Delete the 'REM' comment indicator in front of each individual cube you want to load.
- **3.** Rerun the script.

Automated load and publish process for cubes

You can run scripts to load and publish cubes automatically.

To run the automated scripts, perform the following steps.

- 1. Load or build the following script that contains the cube names and descriptions:
 - buildAPMCube (UNIX)
 - buildAPMCube.bat (Windows)
- **2.** The information is propagated to the second script, which runs automatically on successful execution of the first script. The following script loads the business names for the cubes and deploys or publishes the individual cubes:
 - buildCognosCube (UNIX) or
 - buildCognosCube.bat (Windows)

RESULT:

The cube is now published successfully and you should be able to view it in Cognos.

Modify a cube

You may want to modify a cube to customize it with the data your institution uses. You can add elements from the source data model to the cube, delete elements in the cube that your institution doesn't use, and define or change hierarchies within the cube. Before you modify a delivered cube, make a copy of the cube to ensure you can restore the original cube if needed.



NOTE: You *must* have a Cognos Transformer license to modify a cube. ■

To modify a cube, perform the following steps.

- 1. Launch Cognos Connection.
- 2. Open the Cognos model file (.mdl) that you want to modify.
- 3. Click the data source used in the cube.
- **4.** Select **Modify Columns** from the drop-down list.
- **5.** From the Source, select the new query subjects or columns to add to the cube.
- 6. Click OK.
- **7.** Open the data source in Transformer.
- **8.** Select the columns you want to include in the cube.
- **9.** Add the columns, where appropriate in the Cognos model.
- **10.** Save the new model.
- 11. Select **Insert PowerCube** from the drop-down list.
- **12.** Enter the PowerCube file name. The name cannot include spaces.
- **13.** Click the **Dimension** tab.
- **14.** Identify the dimensions used for the cube being defined. To display in the cube, use the **All Categories** view. To not display in the cube, use the **Omit Dimension** view.
- 15. Click the Measures tab.
- **16.** Select the measures to include and exclude in the cube.

- 17. Select Create Selected PowerCube from the drop-down list and allow the process to capture all the dimensions and measures. A "Cube created successfully" message appears on successful completion of the process.
- 18. Select Publish PowerCube as Data Source and Package from the drop-down list.

RESULT:

After the cube is published, a confirmation message appears. At that point, you can manually place the cube in the desired directory and open it from Cognos Connection or you can use a local Cognos installation to open the cube on your desktop.

Hide attributes in a cube

You can use the security permissions in Cognos to hide behind-the-scenes data used to determine the value for the measures.

To hide attributes in a cube, perform the following steps.

- 1. Launch Cognos Transformer.
- 2. Open the Cognos model file (.mdl) that you want to modify.
- 3. Enter a PowerCube name for the cube where you are hiding attributes.
- **4.** Enter the PowerCube file name. The name cannot include spaces.
- **5.** Click the **Dimension** tab.
- **6.** Identify the dimensions used for the cube being defined. To display in the cube, use the **All Categories** view. To not display in the cube, use the **Omit Dimension** view.
- 7. Click the **Measures** tab.
- **8.** Select the measures to include and exclude in the cube.
- **9.** Select **Create Selected PowerCube** from the drop-down list and allow the process to capture all the dimensions and measures. A "Cube created successfully" message appears on successful completion of the process.
- **10.** Select **Publish PowerCube as Data Source and Package** from the drop-down list.

A confirmation message appears.

11. Click **OK**.

RESULT:

You can now place the cube in the proper directory and open it from Cognos Connection.

Delete an Attribute in Cognos Model File

- 1. Open Cognos.
- 2. Open the Cognos model file (.mdl file) to be modified.
- 3. Create a backup of the delivered model file.

Example:

Save baseline as WFT_ENROLLMENT_delivered.mdl)

- **3.1.** Replace delivered .mdl file with updated model file with institution-specific changes. This ensures that the automated build processes via the Administrative User Interface is not affected.
- **3.1.** Select the Dimension Map window.
 - **3.1.1.** Select the attribute that you would like to eliminate.
 - **3.1.2.** Press the delete key.
- 4. Save the updated institution-specific model file.
- **5.** Reload data into the cube as appropriate.

Add/Change a Hierarchy within Delivered Cognos Model File

- 1. Open Cognos Transformer.
- 2. Open the Cognos Transformer model file (.mdl file) to be modified.
- 3. Create a backup of the delivered model file

Example:

Save baseline as WFT_ENROLLMENT_delivered.mdl

- **3.1.** Replace the delivered .mdl file with the updated model file with institution-specific changes. This ensures that the automated build processes via the Administrative User Interface is not affected.
- 4. Select the Dimension Map window.
 - **4.1.** Select the attribute that you would like to move within a hierarchy.
 - **4.2.** Drag the selected attribute beneath its desired parent within the hierarchy.

Cubes

- 5. Save the updated institution-specific model file.
- **6.** Reload data into the cube as appropriate.

For more detailed information about using Cognos Transformer, refer to the Cognos documentation "Step-by-Step Transformer."

Category Counts in Cubes

Category functionality is used in some of the Banner EDW and performance cubes to create a non-duplicated count (such as applicant count, application count, employee count, and so on) in the IBM Cognos Transformer model file. Category count uses the PERSON_UID dimensions to create measures within the cubes. They are empty dimensions. Nothing appears for these dimensions if they are selected using the Cognos reporting tools.

What are cube reports?

The Cognos interface provides a predefined descriptive view of database information that would otherwise require some understanding of a database query language. Analysis Studio, the IBM Cognos OLAP reporting tool, permits you to browse the data in the defined cube and answer multiple business questions. You can retrieve the pre-aggregated data loaded into the cube in any combination of multiple dimensions and measures to quickly display multiple reports from the data.

Many reports can be generated from each cube. The default cube reports delivered with the product are illustrative samples that expose all or most of the measures using a time attribute to give a perspective of the data. Using the default reports and others that you create, you can see and interpret the meaning of the data within the cube.

Set default cube reports for individual users

You can set up default cube reports for an individual user and save the report under the user's name.

To set default reports, perform the following steps.

- 1. Click the **Public Folders** tab.
- 2. Click Performance Management Packages.
- 3. Click More... in the Actions column for the report that you want to assign to the user.
- 4. Click Modify the package configuration.

- 5. Click Select an analysis....
- **6.** Choose the radio button for the report you want to use as the default for the package.
- 7. Click OK.

The controls return to the Configuration page with the new default cube report name displayed.

8. Click OK.

This displays the Performance Management Packages page.

- 9. Click Launch.
- **10.** Select **Analysis Studio**.
- 11. Select the cube report to open from the **Recently Used Packages** or from the **List of all Packages** menu.
- 12. Select Default Analysis.
- 13. Click OK.

RESULT:

The cube report is displayed instead of the standard report.

Use Reports to View Cubes

The cube is similar to a storage container for all the data connection points between the dimension attributes and the measures in the cube. It is available to create many different reporting views of the data stored within the cube.

- 1. Open your Web browser.
- **2.** Log in to the Cognos Connect page.
- 3. Select the tab, or select the folder to display the desired cube report or cube package.
- **4.** Click the **Launch drop-down** link in the top right hand corner of the page to open the desired reporting tool. Typically cubes are opened using Analysis Studio.

You can save reports to the appropriate folder within the My Folders tab in the IBM Cognos Connection. You can also assign privileges to specific groups as a way to share the reports.

Refer to your IBM Cognos documentation for additional information on IBM Cognos products.

Cubes

5 Dashboards and Performance Charts

The role-based dashboards are designed to be your starting point for reporting and analysis. From the dashboards you can review graphical performance charts or dashboard lists, run other reports, or access online help.

This section outlines the dashboards, performance charts, and dashboard lists included with the product.

Dashboards for Banner Student Retention Performance

Banner Student Retention Performance delivers the following role-based illustrative dashboards:

- "Advisor dashboard"
- "Dean of College dashboard"
- "Director of Retention dashboard"

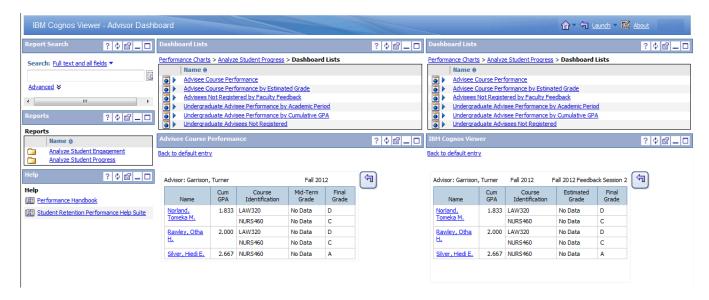
The delivered dashboards are intended to illustrate the graphical content you can include in a dashboard. You can use the dashboards as delivered or customize them for your institution. You can also create additional dashboards. Changing the delivered dashboards or creating new ones allows you to select the performance measures relevant to your users' specific business needs.

Each dashboard includes graphical performance charts or dashboard lists. All performance charts and dashboard lists were built using Cognos Report Studio. Report Studio produces graphical charts with dynamic prompts that allow you to change the content or characteristics presented in the chart. When you view a dashboard, you can dynamically select values for some parameter fields of the chart data.

The delivered dashboards are stored in the **Public Folders > Student Retention Performance > Dashboards** folder when the product is installed.

Advisor dashboard

The Advisor dashboard is intended for use by your institution's advisors, advising office, deans, or others who serve in an advising capacity. This dashboard helps to retrieve, at a glance, the advisee information during peak advising periods.



You can customize this dashboard to include dashboard lists relevant to the needs of your users. See the **Change a dashboard** topic to learn what you can change on a dashboard and how to make the changes.

The Advisor dashboard includes the following Analyze Student Progress and Analyze Student Engagement dashboard lists:

- Advisee Course Performance
- Undergraduate Advisee Performance by Academic Period
- Undergraduate Advisee Performance by Cumulative GPA
- Undergraduate Advisees Not Registered
- Undergraduate Interaction Aging List
- Undergraduate Recent Interactions List

Dean of College dashboard

The Dean of College dashboard brings together all of the delivered proposal-related performance charts onto one dashboard. This dashboard is intended for use by administrators of colleges, programs, and departments in your institution to monitor

performance overall and within courses they administer and to gain insight into retention trends in their areas of responsibility.



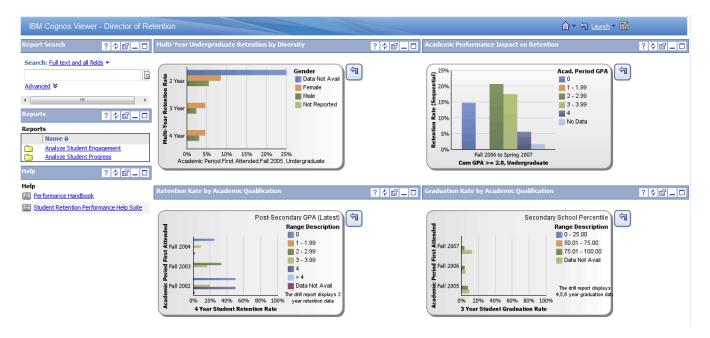
You can customize this dashboard to include dashboard lists relevant to the needs of your users. See the Change a dashboard topic to learn what you can change on a dashboard and how to make the changes.

The Dean of College dashboard includes the following performance charts:

- Advisee Distribution by Advisor Type
- College Migration Impact on Graduation Rate
- Grade Distribution by Course
- Course Performance by Student Classification

Director of Retention dashboard

The Director of Retention dashboard brings together all of the delivered proposal-related performance charts onto one dashboard. This dashboard is intended for use by enrollment management administrators. This dashboard helps to analyze the trends in retention and graduation and make strategic data driven decisions in a timely manner.



You can customize this dashboard to include dashboard lists relevant to the needs of your users. See the Change a dashboard topic to learn what you can change on a dashboard and how to make the changes.

The Director of Retention dashboard includes the following performance charts:

- Multi-Year Undergraduate Retention by Diversity
- Academic Performance Impact on Retention
- Retention Rate by Academic Qualification
- Graduation Rate by Academic Qualification

Performance charts and dashboard lists for Banner Student Retention Performance

Banner Student Retention Performance is delivered with a variety of performance charts and dashboard lists that you can use out-of-the-box or customize to meet your institution's needs. These charts offer a comprehensive high-level view of the state of student success and retention at your institution. Many of the charts include drill through to more detailed related reports.

Performance charts and dashboard lists are built based on information in one of the business concepts - Analyze Student Progress or Analyze Student Engagement. The delivered performance charts and dashboard lists are stored in the **Public Folders**> **Student Retention Performance>Performance Charts** folder when the product is installed. Within the Performance Charts folder, the charts are divided into folders according to the associated business concept and chart type: performance chart or dashboard list.

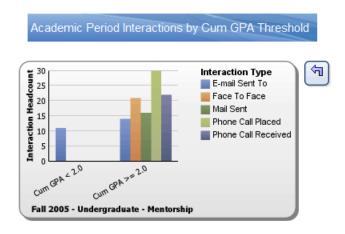
Analyze Student Engagement performance charts and dashboard lists

The following table lists all of the delivered performance charts and dashboard lists that are based on the Analyze Student Engagement business concept. The list also specifies the report type (DL=dashboard list, PC=performance chart) and related drill-through reports.

Performance Chart/Dashboard List	Туре	Drill-through report
"Academic Period Interactions by Cum GPA Threshold performance chart"	PC	Student Interaction by Academic Standing Summary
"Academic Period Monthly Interactions performance chart"	PC	Student Interaction by Academic Standing Summary
"Undergraduate Interaction Aging List dashboard list"	DL	Student Engagement Profile
"Undergraduate Recent Interactions List dashboard list"	DL	Student Engagement Profile

Academic Period Interactions by Cum GPA Threshold performance chart

Use this performance chart to view the number of students who had a particular manual interaction by category (such as advisement or program planning) during a selected academic period. This performance chart segments the student population by Cum GPA threshold and displays columnar detail for all interaction types (such as face to face or phone call) for the manual interaction category in context. This performance chart drills to the Student Interaction by Academic Standing Summary report.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos package includes all data elements in the Analyze Student Engagement business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- What number and types of interactions are most common to successful students?
- For at-risk students, how many and what interactions have they had with their advisors, financial aid, or student services?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from

within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Academic Period Interactions by Cum GPA Threshold performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
College	Select a college to include in the chart.	P_College
Manual Interaction Category*	Select an interaction category to include in the chart.	P_Manual Interaction Category
Student Population	Select a student population to include in the chart.	P_Student Population
Interaction Organization	Select and interaction organization to include in the chart.	p_Interaction Org

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

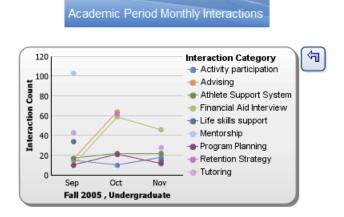
From this performance chart, you can click on one of the graphed values to drill through to the Student Interaction by Academic Standing Summary report. The following table specifies the drill-through parameter values for the Student Interaction by Academic Standing Summary report. These are the parameter values that need to be passed from the Academic Period Interactions by Cum GPA Threshold performance chart to the Student Interaction by Academic Standing Summary report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass data item value	Student Level
p_College		Pass parameter value	P_College

Parameter	Required	Method	Value
drill_Cumulative GPA Threshold		Pass data item value	Cumulative GPA Threshold
drill_Registered Ind		Pass data item value	Default Positive Indicator
p_Manual Interaction Category	X	Pass data item value	Academic Period Interaction Category
p_Manual Interaction From Date Range	X	Pass data item value	Academic Period Begin Date For Drill
p_Manual Interaction Organization		Pass data item value	p_Interaction Org
p_Manual Interaction To Date Range	X	Pass data item value	Academic Period End Date For Drill
p_Manual Interaction Type		Pass data item value	Academic Period Interaction Type
p_Student Population		Pass parameter value	P_Student Population

Academic Period Monthly Interactions performance chart

Use this performance chart to view the frequency or number of manual interactions (by category) over the months within an academic period. The following figure illustrates the Academic Period Monthly Interactions performance chart.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos package includes all data elements in the Analyze Student Engagement business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- What number and types of interactions are most common to successful students?
- For at-risk students, how many and what interactions have they had with their advisors, financial aid, or student services?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Academic Period Monthly Interactions performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Academic Standing Begin	Select an academic standing status to include in the chart.	p_Academic Standing
Manual Interaction Category*	Select a manual interaction category to include in the chart.	p_Interaction Category
Cum GPA Threshold	Select the Cum GPA Threshold to filter the population that will display in the chart. The delivered values are >=2.0 or <2.0.	p_Cum GPA Threshold
College	Select a college to include in the chart.	p_College
Interaction Organization	Select an interaction organization to include in the chart.	p_Interaction Organization
Student Population	Select a student population to include in the chart.	p_Student Population

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

From this performance chart, you can click on one of the graphed values to drill through to the Student Interaction by Academic Standing Summary report. The following table specifies the drill-through parameter values for the Student Interaction by Academic Standing Summary report. These are the parameter values that need to be passed from the Academic Period Monthly Interactions performance chart to the Student Interaction by Academic Standing Summary report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass data item value	Student Level
p_College		Pass parameter value	p_College

Parameter	Required	Method	Value
drill_Registered Ind		Pass data item value	Default Positive Indicator for Drill
drill_Cumulative GPA Threshold		Pass parameter value	p_CumGPA Threshold
p_Academic Standing Begin		Pass parameter value	p_Academic Standing
p_Manual Interaction Category	X	Pass data item value	Academic Period Interaction Category
p_Manual Interaction From Date Range	X	Pass data item value	Academic Period Begin Date For Drill
p_Manual Interaction Organization		Pass parameter value	p_Interaction Organization
p_Manual Interaction To Date Range	X	Pass data item value	Academic Period End Date For Drill
p_Student Population		Pass parameter value	p_Student Population

Undergraduate Interaction Aging List dashboard list

Use this dashboard list to view a list of students for a selected advisor and academic period who haven't had an interaction (of the interaction category selected) between today and the "No Interaction Since" date selected when running the chart.

Cognos Viewer - Undergraduate Interaction Aging List



Dashboard List package

This dashboard list was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos package includes all data elements in the Analyze Student Engagement business concept data model.

Business questions

This dashboard list can answer the following types of business questions:

- Which students have not been in contact with their advisor within a specified period of time?
- Have the students in at risk academic standing had a tutoring interaction within a specified period of time?

Prompts

Initially when you select a dashboard list you need to select prompt values before you run the report. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a dashboard list by saving the list with specified prompt values. Each time you run the saved version, stand-alone or from within a dashboard, the dashboard list displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a

list in the dashboard. Refer to the "Create a report view" topic for details on how to do this.

The Undergraduate Interaction Aging List dashboard list uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Advisor Name*	Select an Advisor Name to specify which advisor's students to include in the report. After you select an academic period, the Advisor Name list is populated with the correct advisors for that period.	p_Advisor name
Latest Interaction Category*	Select which latest interaction category to include in the report.	P_Interaction
Advisor Type	Select which advisor type to include in the report.	p_Advisor Type
No Interaction Since*	Select the date to be used as the beginning date in a range that will look for interactions between the selected date and the date you run the report.	P_No Interactions Since
Academic Standing Begin	Select an academic standing status to include in the chart.	p_Academic Standing Begin

Select prompt values and click **Submit** to run the dashboard list. The report displays based on the prompt values you selected. After you run the report, you can change the values for any of the prompts and rerun the report. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

From this dashboard list you can click on one of the names to drill through to the Student Engagement Profile report. The following table specifies the drill-through parameter values for the Student Engagement Profile report. These are the parameter values that need to be passed from the Undergraduate Interaction Aging List dashboard list to the Student Engagement Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass data item value	Student Level
drill_Person UID		Pass data item value	PERSON_UID
p_Interaction From Date	X	Pass parameter value	P_No Interactions Since
p_Interaction To Date	X	Pass data item value	Sys Date for Drill

Undergraduate Recent Interactions List dashboard list

Use this dashboard list to view a list of students for a selected advisor and academic period who have had an interaction (of the interaction category selected) between today and the "Interaction Occurred Since" date selected when running the chart.

ognos Viewer - Undergraduate Recent Interactions List					
Prompt	S				
rimary A	dvisor: Sutter,	Keane A.	Fall 2005		
Cum GPA	Interaction Date	Interaction Category	Interaction Type	Interaction Subject Line	
Bently, I	Khalid A. (Soph	omore - Biomedi	cal Engineering)	
2.462	15-Nov- 2005	Life skills support	Phone Call Placed	Program Planning Email	
LeFebvr	e, Alison I. (Fr	eshman - Biomed	dical Engineerin	g)	
2.667	10-Sep- 2005	Life skills support	Phone Call Placed	Program Planning Email	
Longtin,	Clarisa A. (Sop	ohomore - Biome	dical Engineerin	ng)	
3.833	10-Sep- 2005	Life skills support	Phone Call Placed	Program Planning Email	
Ramsey	, Chrissy R. (Fr	reshman - Biome	dical Engineerin	ng)	
3.654	27-May- 2006	Life skills support	Face To Face	Program Planning Email	

Dashboard List package

This dashboard list was built in Report Studio and is based on data in the PM Analyze Student Engagement business concept. The delivered PM Analyze Student Engagement Cognos package includes all data elements in the Analyze Student Engagement business concept data model.

Business questions

This dashboard list can answer the following types of business questions:

- For at-risk students, how many and what interactions have they had with their advisors, financial aid, and student services?
- Which of my first-time freshmen advises have completed their campus life orientation within the first 30 days of this academic period?

Prompts

Initially when you select a dashboard list you need to select prompt values before you run the report. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a dashboard list by saving the list with specified prompt values. Each time you run the saved version, stand-alone or from within a dashboard, the dashboard list displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a list in the dashboard. Refer to the "Create a report view" topic for details on how to do this.

The Undergraduate Recent Interactions List dashboard list uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Primary Advisor Name*	Select a Primary Advisor Name to specify which advisor's students to include in the report. After you select an academic period, the Primary Advisor Name list is populated with the correct advisors for that period.	p_Advisor Name
Interaction Category*	Select which interaction category to include in the chart.	p_Interaction Category
College	Select a college to include in the chart.	p_College
Student Classification	Select which student classification to include in the chart.	p_Student Classification

Prompt	Description	Parameter
Interaction Occurred Since*	Select the date to be used as the beginning date in a range that will look for interactions between the selected date and the date you run the chart.	p_Interaction Occurred From Date
Academic Standing Begin	Select an academic standing status to include in the chart.	p_Academic Standing

Select prompt values and click **Submit** to run the dashboard list. The report displays based on the prompt values you selected. After you run the report, you can change the values for any of the prompts and rerun the report. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

From this dashboard list you can click on one of the names to drill through to the Student Engagement Profile report. The following table specifies the drill-through parameter values for the Student Engagement Profile report. These are the parameter values that need to be passed from the Undergraduate Recent Interactions List dashboard list to the Student Engagement Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass data item value	Student Level
drill_Person UID		Pass data item value	'PERSON_UID
p_Interaction From Date	X	Pass parameter value	p_Interaction Occurred From Date
p_Interaction To Date	X	Pass data item value	Sys Date for Drill

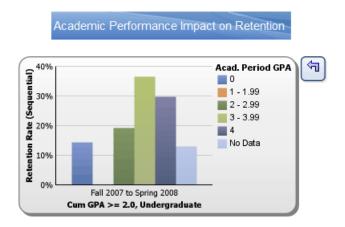
Analyze Student Progress performance charts and dashboard lists

The following table lists all of the delivered performance charts and dashboard lists that are based on the Analyze Student Progress business concept. The list also specifies the report type (DL=dashboard list, PC=performance chart) and related drill-through reports.

Performance Chart/Dashboard List	Туре	Drill-through report
"Academic Performance Impact on Retention performance chart"	PC	Student List Detail
"Advisee Course Performance dashboard list"	DL	Student Full Profile
"Advisee Course Performance by Estimated Grade dashboard list"	DL	Student Full Profile by Faculty Feedback
"Advisees Not Registered by Faculty Feedback dashboard list"	DL	Student Full Profile by Faculty Feedback
"Advisee Distribution by Advisor Type performance chart"	PC	Student by Advisor Detail
"College Migration Impact on Graduation Rate performance chart"	PC	None
"Course Performance by Student Classification performance chart"	PC	Student Course Section Performance by Student Detail
"Grade Distribution by Course performance chart"	PC	Student Course Section Performance by Student Detail
"Graduation Rate by Academic Qualification performance chart"	PC	Academic Qualifications Impact on Retention to Graduation Trend
"Multi-Year Undergraduate Retention by Diversity performance chart"	PC	Student List Detail
"Retention Rate by Academic Qualification performance chart"	PC	Academic Qualifications Impact on Retention to Graduation Trend
"Undergraduate Advisees Not Registered dashboard list"	DL	Student Full Profile
"Undergraduate Advisee Performance by Academic Period dashboard list"	DL	Student Full Profile
"Undergraduate Advisee Performance by Cumulative GPA dashboard list"	DL	Student Full Profile

Academic Performance Impact on Retention performance chart

Use this performance chart to view students by an Academic Period GPA range based on a selected Cumulative GPA Threshold and look at the impact of retention to the next academic period. This performance chart drills to the Student List Detail report.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- Am I losing students who may have a good cumulative GPA, but performed poorly for one academic period?
- What group or cohort of students should retention strategies focus on?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report

view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Academic Performance Impact on Retention performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Student Level*	Select a Student Level to specify which level of data to display in the chart.	p_Student Level
Cum GPA Threshold*	Note: Select the Cum GPA Threshold to filter the population that will display in the chart. The delivered values are >=2.0 or <2.0. Note: Your institution can define the Cumulative GPA Threshold value using the Banner EDW Cleansing Values.	p_Cum GPA Threshold

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

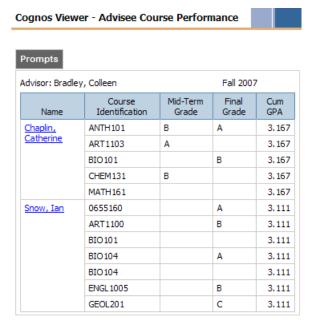
From this performance chart, you can click on one of the graphed values to drill through to the Student List Detail report. The following table specifies the drill-through parameter values for the Student List Detail report. These are the parameter values that need to be passed from the Academic Performance Impact on Retention performance chart to the Student List Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
drill_Academic Period GPA Range		Pass data item value	Academic Period GPA Range
drill_Cum GPA Threshold		Pass parameter value	p_Cum GPA Threshold

Parameter	Required	Method	Value
drill_Retention Period Sequential		Pass data item value	Retention Period (Sequential)
p_Student Level	X	Pass parameter value	p_Student Level

Advisee Course Performance dashboard list

Use this dashboard list to view student performance for a group of student advisees by term and advisor. You can identify students based on their performance in a course and focus on those who did not perform well either at midterm or end of semester. Once identified, you can proactively work with these students to get them back on track and succeed. From this report you can drill to the Student Full Profile report for more detailed information.



Dashboard List package

This dashboard list was built in Report Studio and is based on data in the Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This dashboard list can answer the following types of business questions:

• What are the characteristics of the students who fail?

- Which advisees did not perform well at mid-term or end of semester?
- Which advisees are excelling?
- Which advisees did not perform well at mid-term, but have been able to pull their final grade up? Will this impact their ability to register and get the classes they need?

Prompts

Initially when you select a dashboard list you need to select prompt values before you run the report. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Advisee Course Performance dashboard list uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Advisor Name*	Select an Advisor Name to specify which advisor's students to include in the report. After you select an academic period, the Advisor Name list is populated with the correct advisors for that period.	p_Advisor Name
Student Level*	Select a Student Level to specify which level of data to display in the chart.	p_Student Level
Mid-Term Grade	Select one or more Mid-Term Grade values to filter the report results based on which courses received the selected mid-term grades. If you don't select any values, all courses will be included in the report.	p_Mid Term Grade
Final Grade	Select one or more Final Grade values to filter the report results based on which courses received the selected final grades. If you don't select any values, all courses will be included in the report.	p_Final Grade

Select prompt values and click **Submit** to run the dashboard list. The report displays based on the prompt values you selected. After you run the report, you can change the values for any of the prompts and rerun the report. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

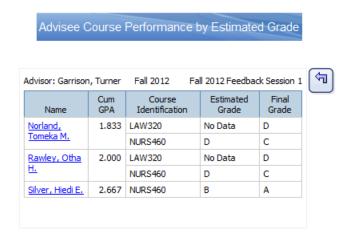
Drill-through definitions

From this dashboard list, you can click on one of the student names to drill through to the Student Full Profile report. The following table specifies the drill-through parameter values for the Student Full Profile report. These are the parameter values that need to be passed from the Advisee Course Performance dashboard list to the Student Full Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass parameter value	p_Student Level
drill_Person_uid		Pass data item value	PERSON_UID

Advisee Course Performance by Estimated Grade dashboard list

Use this dashboard to determine whether an estimated grade given during faculty feedback impacted a student's final grade.



Dashboard List package

This dashboard list was built in Report Studio and is based on data in the Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This dashboard list can answer the following types of business questions:

- How is my advisee's course performance?
- Did faculty feedback estimated grade impact an advisee's final grade?

Prompts

Initially when you select a dashboard list you need to select prompt values before you run the report. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Advisee Course Performance by Estimated Grade dashboard list uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Advisor Name*	Select an Advisor Name to specify which advisor's students to include in the report. After you select an academic period, the Advisor Name list is populated with the correct advisors for that period.	p_Advisor Name
Student Level*	Select a Student Level to specify which level of data to display in the chart.	p_Student Level
Faculty Feedback Session*	Select a Faculty Feedback Session to display a list of students belonging to the selected Feedback Session after selecting the Academic Period.	p_Feedback Session

Prompt	Description	Parameter
Estimated Grade	Select Estimated Grade to show the list of students belonging to the selected estimated grades.	p_Estimated Grade
Final Grade	Select one or more Final Grade values to filter the report results based on which courses received the selected final grades. If you don't select any values, all courses will be included in the report.	p_Final Grade

Select prompt values and click **Submit** to run the dashboard list. The report displays based on the prompt values you selected. After you run the report, you can change the values for any of the prompts and rerun the report. To do this, select the **Prompts** button, change the prompt values selected, and click Submit.

Drill-through definitions

From this dashboard list, you drill through to the Student Full Profile by Faculty Feedback report. The following table specifies the drill-through parameter values for the Student Full Profile by Faculty Feedback report. These are the parameter values that need to be passed from the Advisee Course Performance by Estimated Grade dashboard list to the Student Full Profile by Faculty Feedback report for the drill-through to work properly.

Parameter	Required	Method	Value
drill_person_uid		Pass Data Item Value	PERSON_UID
p_Academic Period	X	Pass Parameter Value	p_Academic Period
p_Student Level	X	Pass Parameter Value	p_Student Level

Advisees Not Registered by Faculty Feedback dashboard list

Use this dashboard list to determine which of your advisees are not registered for the next semester and what, if any, faculty feedback they have received during the current semester.

Advisees Not Registered by Faculty Feedback



Dashboard List package

This dashboard list was built in Report Studio and is based on data in the Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This dashboard list can answer the following types of business questions:

- Which of my advisees have not registered for next semester?
- What type of Faculty Feedback did they receive for the current semester?

Prompts

Initially when you select a dashboard list you need to select prompt values before you run the report. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Advisees Not Registered by Faculty Feedback dashboard list uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Advisor Name*	Select an Advisor Name to specify which advisor's students to include in the report. After you select an academic period, the Advisor Name list is populated with the correct advisors for that period.	p_Advisor Name
Student Classification*	Select Student Classification to display the list of students belonging to the selected Student Classifications.	p_Student Classification
Student Level*	Select a Student Level to specify which level of data to display in the chart.	p_Student Level
Advisor Type	Select an Advisor Type to show the Advisors belonging to the selected Advisor type in the chart.	p_Advisor Type

Select prompt values and click **Submit** to run the dashboard list. The report displays based on the prompt values you selected. After you run the report, you can change the values for any of the prompts and rerun the report. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

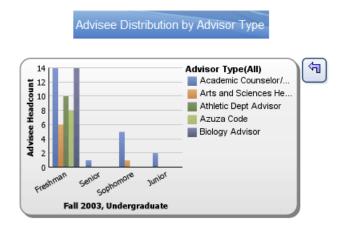
Drill-through definitions

From this dashboard list, you drill through to the Student Full Profile by Faculty Feedback report. The following table specifies the drill-through parameter values for the Student Full Profile by Faculty Feedback report. These are the parameter values that need to be passed from the Advisees Not Registered by Faculty Feedback dashboard list to the Student Full Profile by Faculty Feedback report for the drill-through to work properly.

Parameter	Required	Method	Value
drill_person_uid		Pass Data Item	PERSON_UID
p_Academic Period	X	Pass Parameter Value	p_Academic_Period
p_Student Level	X	Pass Parameter Value	p_Student Level

Advisee Distribution by Advisor Type performance chart

Use this performance chart to gain a better understanding of the advisee load across student classifications by advisor type. You can drill into the information to examine student details and academic performance of the advisees.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- What group or cohort of students should retention strategies focus on?
- Are the freshmen getting consistent advising or has it been spread across too many advisors?
- Are the freshmen advisors carrying too large of an advisee load? Will they be able to adequately mentor and advise the new students?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need

to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Advisee Distribution by Advisor Type performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Primary Advisor	Select whether the report should only look at those advisors who are marked as primary advisors. If nothing is selected, the report will display all advisor types.	Primary Advisor
Student Classification*	Select one or more student classification values to specify which classifications to include in the chart.	p_Student Classification
Advisor Type*	Select one or more advisor type values to filter by advisor type.	p_Advisor Type

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

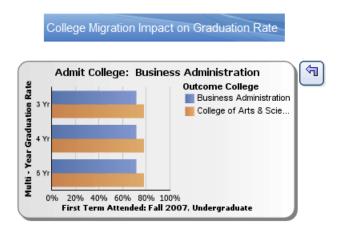
From this performance chart, you can click on one of the graphed values to drill through to the Student by Advisor Detail report. The following table specifies the drill-through parameter values for the Student by Advisor Detail report. These are the parameter values that need to be passed from the Advisee Distribution by Advisor Type performance chart to the Student by Advisor Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass data item value	Student Level
drill_Registered Ind		Pass data item value	Registered Ind
drill_Primary Advisor		Pass parameter value	Primary Advisor

Parameter	Required	Method	Value
drill_Student Classification		Pass data item value	Student Classification
p_Advisor Type		Pass data item value	Advisor Type

College Migration Impact on Graduation Rate performance chart

Use this performance chart to analyze the impact that a student's change in their college at the time of their admission to graduation has on the time to graduation.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- Which programs are doing the best job of graduating students on time?
- Is a student's ability to graduate on time impacted by a change in their college?
- What was the 4 Year, 5 Year, and 6 Year completion rate for students who started in one college, for example College of Arts and Sciences, but graduate from a different college in comparison to those students who did not change colleges?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

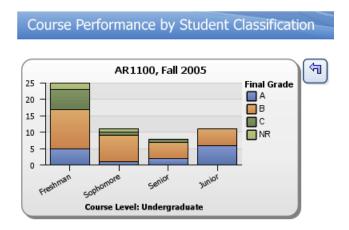
The College Migration Impact on Graduation Rate performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period First Attended*	Select an academic period first attended to establish the population that college migration and graduation rates will be based on. The graduation rates will be based on this academic period.	p_Academic Period First Attended
Admit Student Level*	Select an Admit Student Level to specify which level to include in the chart based on the level students were in when they were admitted to the institution.	p_Admit Student Level
Admit College*	Select an Admit College to specify which college to include in the chart based on the college students were in when they were admitted to the institution.	p_Admit College
Multi-Year Graduation Rate*	Select one or more Multi-Year Graduation Rate values to specify which rates to include in the chart.	p_Graduation Rate Prompt

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Course Performance by Student Classification performance chart

Use this performance chart to view student performance based on student classifications at the time the course was completed.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- In what content areas do students demonstrate deficiencies?
- Where is my highest rate of course failure, and what are the characteristics of the students who fail?
- Are students meeting the minimum grade requirements for a specified course and how will that impact student retention?
- Based on how many students are meeting grade requirements in a particular prerequisite course (for example, BIO101) how many sections of the follow-up course (BIOL102) will be needed next semester so that students can progress on schedule?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Course Performance by Student Classification performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Course Identification*	Select a course from the Course Identification list to specify which course's grade distribution to display in the chart. The chart will display the distribution of grades for that course taught during the selected academic period. The Course Identification list is populated with the correct courses for that period after you select an academic period.	p_Course Identification
Course Level*	Select a Course Level to specify which level to display in the chart.	p_Course Level
Final Grade*	Select one or more Final Grade values to filter the report results based on which courses received the selected final grades.	p_Final Grade
Student Classification	Select one or more student classification values to specify which classifications to include in the chart.	p_Student Classification

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

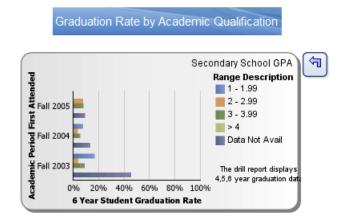
Drill-through definitions

From this performance chart, you can click on one of the graphed values to drill through to the Student Course Section Performance by Student Detail report. The following table specifies the drill-through parameter values for the Student Course Section Performance by Student Detail report. These are the parameter values that need to be passed from the Course Performance by Student Classification performance chart to the Student Course Section Performance by Student Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Course Level	X	Pass parameter value	p_Course Level
p_Final Grade		Pass data item value	Final Grade
p_Student Classification		Pass data item value	Student Classification
drill_Course Identification		Pass parameter value	p_Course Identification

Graduation Rate by Academic Qualification performance chart

Use this performance chart to analyze whether the academic qualifications of students at the time of admission have any impact on their retention from year to year.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- Do the academic qualifications of a student at the time of admission have any impact on his/her ability to graduate on time?
- How do college retention and completion rates vary among groups of students?
- Are students academically prepared to enter college and complete their program or degree in a timely manner?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Graduation Rate by Academic Qualification performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period First Attended*	Select an academic period first attended to specify which period of data to include in the chart.	p_Academic Period First Attended
Multi-Year Graduation Rate*	Select a multi-year graduation rate value to specify which rate to include in the chart.	Graduation Rate
Prior Education Ranges*	Select a type of prior education (Secondary or Latest Post-Secondary) academic qualification range to specify which range to include in the chart.	Prior Education
Student Population*	Select a student population to include in the chart.	p_Student Population
Test (Highest) Required for Drill*	Select a test to be used to evaluate the impact of academic qualifications on retention to graduation. This performance chart drills to a comprehensive report that looks at the impact of academic qualifications on retention to graduation. A test selection is required here to facilitate drill through to the underlying report.	p_Test

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

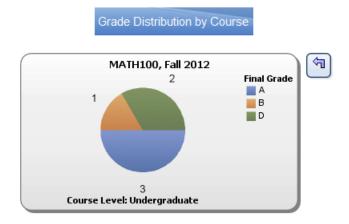
Drill-through definitions

From this performance chart, you can click on one of the graphed values to drill through to the Academic Qualifications Impact on Retention to Graduation Trend report. The following table specifies the drill-through parameter values for the Academic Qualifications Impact on Retention to Graduation Trend report. These are the parameter values that need to be passed from the Graduation Rate by Academic Qualification performance chart to the Academic Qualifications Impact on Retention to Graduation Trend report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period First Attended	X	Pass data item value	Academic Period First Attended
p_Student Level	X	Pass data item value	Student Level
p_Student Population		Pass parameter value	p_Student Population
p_Test	X	Pass parameter value	p_Test
p_Prior Education	X	Pass data item value	Prior Education

Grade Distribution by Course performance chart

Use this performance chart to view the grade distribution of a specific course for a specific academic period. The chart can assist in evaluating the distribution of the grades for this course and drill to student detail to further evaluate student progression.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- Is there an even distribution of grades within a course and what are the characteristics of students for each grade within the course?
- In what content areas do students demonstrate deficiencies that might require remediation?
- Where is my highest rate of course failure, and what are the characteristics of the students who fail?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from

within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Grade Distribution by Course performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Course Identification*	Select a course from the Course Identification list to specify which course's grade distribution to display in the chart. he chart will display the distribution of grades for that course taught during the selected academic period. The Course Identification list is populated with the correct courses for that period after you select an academic period.	p_Course Identification
Course Level*	Select a Course Level to specify which level to display in the chart.	p_Course Level

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

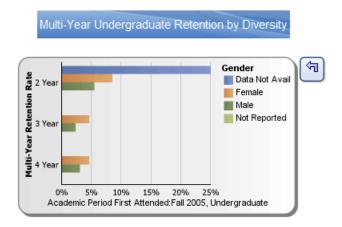
From this performance chart, you can click on one of the graphed values to drill through to the Student Course Section Performance by Student Detail report. The following table specifies the drill-through parameter values for the Student Course Section Performance by Student Detail report. These are the parameter values that need to be passed from the Grade Distribution by Course performance chart to the Student Course Section Performance by Student Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Course Level	X	Pass parameter value	p_Course Level

Parameter	Required	Method	Value
p_Final Grade		Pass data item value	Final Grade
drill_Course Identification		Pass parameter value	p_Course Identification

Multi-Year Undergraduate Retention by Diversity performance chart

Use this performance chart to evaluate the retention rate of students by diversity characteristics, such as gender, race, citizenship, admit age, and legacy.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This performance chart can answer the following types of business questions:

• How do college retention rates vary among groups of students by diversity?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Multi-Year Undergraduate Retention by Diversity performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period First Attended*	Select an academic period first attended to specify which group of students to include in the report.	p_Academic Period First Attended
Diversity*	Select which diversity characteristic to include in the report. You can select on of the following diversity characteristics: Admit Age, Citizenship Type, Race Category, Gender, or Legacy.	Diversity
Multi-Year Retention Rate*	Select one or more Multi-Year Retention Rate values to specify which rates to include in the chart.	p_Retention Rate Prompt

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

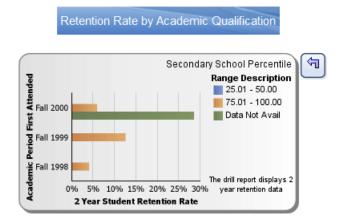
From this performance chart, you can click on one of the graphed values to drill through to the Student List Detail report. The following table specifies the drill-through parameter values for the Student List Detail report. These are the parameter values that need to be passed from the Multi-Year Undergraduate Retention by Diversity performance chart to the Student List Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass data item value	Academic Period First Attended
drill_Admit Age Range Order		Pass data item value	Admit Age Range Order

Parameter	Required	Method	Value
p_Academic Period First Attended		Pass parameter value	p_Academic Period First Attended
p_Student Level	X	Pass data item value	Student Level

Retention Rate by Academic Qualification performance chart

Use this performance chart to view the academic qualifications of a group of students at the time of admission to determine whether the institutions's academic qualification benchmarks are good indicators of a student's retention to a second year.



Performance Chart Package

This performance chart was built in Report Studio and is based on data in the PM Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This performance chart can answer the following types of business questions:

- Are the institution's academic qualification benchmarks for a group of students at the time of admission good indicators of a student's retention to a second year?
- What is the relationship between students' academic qualifications and subsequent first year college performance and retention to second year?
- How do college retention and completion rates vary among groups of students?

Prompts

Initially when you select a performance chart you need to select prompt values before you run the chart. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a performance chart by saving a chart with specified prompt values. Each time you run the saved version of the chart, stand-alone or from within a dashboard, the chart displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a chart in the dashboard. Refer to the "Create a report view from a performance chart" topic for details on how to do this.

The Retention Rate by Academic Qualification performance chart uses the following prompts.

Prompt	Description	Parameter
Academic Period First Attended*	Select an academic period first attended to identify the population of students to include in the report. The retention rates will be based on this academic period.	p_Academic Period First Attended
Multi-Year Retention Rate*	Select one or more Multi-Year Retention Rate values to specify which rates to include in the chart.	Retention rate
Prior Education Ranges*	Select a type of prior education (Secondary or Latest Post-Secondary) academic qualification range to specify which range to include in the chart.	Prior Education
Student Population*	Select a student population as of the student's first term attended to filter the population for this chart.	p_Student Population
Test (Highest) Required for Drill*	Select a test to be used to evaluate the impact of academic qualifications on retention to graduation. This performance chart drills to a comprehensive report that looks at the impact of academic qualifications on retention to graduation. A test selection is required here to facilitate drill through to the underlying report.	p_Test

Select prompt values and click **Submit** to run the chart. The performance chart displays based on the prompt values you selected. After you run the chart, you can change the values for any of the prompts and rerun the chart. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

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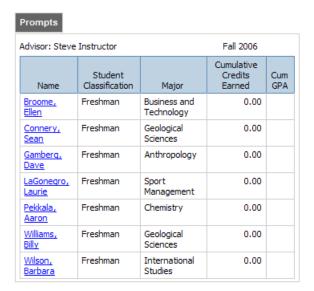
Drill-through definitions

From this performance chart, you can click on one of the graphed values to drill through to the Academic Qualifications Impact on Retention to Graduation Trend report. The following table specifies the drill-through parameter values for the Academic Qualifications Impact on Retention to Graduation Trend report. These are the parameter values that need to be passed from the Retention Rate by Academic Qualification performance chart to the Academic Qualifications Impact on Retention to Graduation Trend report for the drill-through to work properly.

Parameter	Required	Method	Value	
p_Academic Period First Attended	X	Pass data item value	Academic Period First Attended	
p_Student Level	X	Pass data item value	Student Level	
p_Student Population		Pass parameter value	p_Student Population	
p_Test	X	Pass parameter value	p_Test	
p_Prior Education	X	Pass data item value	Prior Education	

Undergraduate Advisees Not Registered dashboard list

Use this dashboard list to view a list of advisees who are eligible to register but have not yet registered to determine what action is needed. From this report you can drill to the Student Full Profile report for more detailed information.



Dashboard List package

This dashboard list was built in Report Studio and is based on data in the Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This dashboard list can answer the following types of business questions:

• Which of my advisees are eligible to register but have not registered yet? Are they at risk? What follow up action is needed?

Prompts

Initially when you select a dashboard list you need to select prompt values before you run the report. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a dashboard list by saving the list with specified prompt values. Each time you run the saved version, stand-alone or from within a dashboard, the dashboard list displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a list in the dashboard. Refer to the "Create a report view" topic for details on how to do this.

The Undergraduate Advisees Not Registered dashboard list uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Advisor Name*	Select an Advisor Name to specify which advisor's students to include in the report. After you select an academic period, the Advisor Name list is populated with the correct advisors for that period.	p_Advisor Name
Student Classification*	Select one or more student classification values to specify which classifications to include in the chart.	p_Student Classification
Advisor Type	Select one or more advisor type values to to filter by advisor type.	p_Advisor Type

Select prompt values and click **Submit** to run the dashboard list. The report displays based on the prompt values you selected. After you run the report, you can change the values for any of the prompts and rerun the report. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

From this dashboard list, you can click on one of the graphed values to drill through to the Student Full Profile report. The following table specifies the drill-through parameter values for the Student Full Profile report. These are the parameter values that need to be passed from the Undergraduate Advisees Not Registered dashboard list to the Student Full Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass data item value	Student Level
drill_Person_uid		Pass data item value	PERSON_UID

Undergraduate Advisee Performance by Academic Period dashboard list

Use this dashboard list to review the academic performance over the last three academic periods of advisees for the selected advisor. From this report you can drill to the Student Full Profile report for more detailed information. You can use the two reports to identify students who the advisor may need to contact.



Dashboard List package

This dashboard list was built in Report Studio and is based on data in the Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This dashboard list can answer the following types of business questions:

- What have been the academic performance trends for my identified potential at risk advisees?
- Has the GPA of any of my advisees fallen to the level that indicates they may be a retention risk?
- Have any of my advisees not declared a major who should have? Does that put them at risk?

Prompts

Initially when you select a dashboard list you need to select prompt values before you run the report. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a dashboard list by saving the list with specified prompt values. Each time you run the saved version, stand-alone or from within a dashboard, the dashboard list displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a list in the dashboard. Refer to the "Create a report view" topic for details on how to do this.

The Undergraduate Advisee Performance by Academic Period dashboard list uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Advisor Name*	Select an Advisor Name to specify which advisor's students to include in the report. After you select an academic period, the Advisor Name list is populated with the correct advisors for that period.	p_Advisor Name
Advisor Type	Select one or more advisor type values to to filter by advisor type. If you don't select any values, all advisor types will be included in the report.	p_Advisor Type

Select prompt values and click **Submit** to run the dashboard list. The report displays based on the prompt values you selected. After you run the report, you can change the values for any of the prompts and rerun the report. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

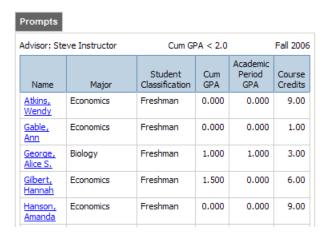
Drill-through definitions

From this dashboard list you can click on one of the names to drill through to the Student Full Profile report. The following table specifies the drill-through parameter values for the Student Full Profile report. These are the parameter values that need to be passed from the Undergraduate Advisee Performance by Academic Period dashboard list to the Student Full Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass data item value	Academic Period
p_Student Level	X	Pass data item value	Student Level
drill_Person_uid		Pass data item value	PERSON_UID

Undergraduate Advisee Performance by Cumulative GPA dashboard list

Use this dashboard list to view a list of students for a selected advisor who fall above or below the university's cumulative GPA threshold. You can review the students' cumulative and academic period GPA for a given academic period and course credits for the specified academic period. From this report you can drill to the Student Full Profile report for more detailed information on a specific student.



Dashboard List package

This dashboard list was built in Report Studio and is based on data in the Analyze Student Progress business concept. The delivered PM Analyze Student Progress Cognos package includes all data elements in the Analyze Student Progress business concept data model.

Business questions

This dashboard list can answer the following types of business questions:

- Which of my advisees may be at risk of retention based on their recent academic performance and/or course load?
- Which of my advisees are having academic difficulty and may need to have a meeting with their advisor?
- Which of my advisees are doing well?

Prompts

Initially when you select a dashboard list you need to select prompt values before you run the report. You must select a value for required prompts which are noted with an asterisk (*).

You can create report views of a dashboard list by saving the list with specified prompt values. Each time you run the saved version, stand-alone or from within a dashboard, the dashboard list displays for the pre-defined prompt values; you do not need to specify the prompts. You can enhance a customized dashboard by including a report view version of a list in the dashboard. Refer to the "Create a report view" topic for details on how to do this.

The Undergraduate Advisee Performance by Cumulative GPA dashboard list uses the following prompts.

Prompt	Description	Parameter
Academic Period*	Select an Academic Period to specify which period of data to display in the chart.	p_Academic Period
Advisor Name*	Select an Advisor Name to specify which advisor's students to include in the report. After you select an academic period, the Advisor Name list is populated with the correct advisors for that period.	p_Advisor Name
Cum GPA Threshold*	Select the Cum GPA Threshold to filter the population that will display in the chart. The delivered values are >=2.0 or <2.0.	p_Cum GPA Threshold
Student Classification	Select one or more student classification values to specify which classifications to include in the chart.	p_Student Classification

Select prompt values and click **Submit** to run the dashboard list. The report displays based on the prompt values you selected. After you run the report, you can change the values for any of the prompts and rerun the report. To do this, select the **Prompts** button, change the prompt values selected, and click **Submit**.

Drill-through definitions

From this dashboard list you can click on one of the names to drill through to the Student Full Profile report. The following table specifies the drill-through parameter values for the Student Full Profile report. These are the parameter values that need to be passed from the Undergraduate Advisee Performance by Cumulative GPA dashboard list to the Student Full Profile report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	X	Pass parameter value	p_Academic Period
p_Student Level	X	Pass data item value	Student Level
drill_Person_uid		Pass data item value	PERSON_UID

What is a dashboard?

A dashboard is a visual display of key information organized into a single screen. You can use a dashboard to monitor aspects of your institution's progress at a glance. A dashboard typically focuses information around the specific analytical needs of one user or role. From a dashboard you can review graphical performance charts and run other reports.

The dashboards include the following:

- Graphical representations of your institution's key performance measures with the ability to drill through to more detailed reports
- Report folders that enable you to group reports into logical collections
- Performance charts or dashboard lists that you can switch in or out
- Colors and logos that you can change
- Tools to search for a report, access commonly viewed reports from the report list, or access Online Help

Dashboard components

A dashboard includes several components. Each numbered item in the sample dashboard corresponds to a component description in the following table.



#	Item	Description
1	Cognos Connection Toolbar	The Cognos Connection Toolbar gives you access to functions of the Cognos interface including a Search feature and icons for Refresh, Home, My Area, and Help to access the Cognos Help. The Launch link opens a menu of other Cognos tools such as Query Studio and Report Studio.
2	Product tabs	Product tabs include information organized into tabs that you can select. There is a Public Folders tab, a personal My Folders tab, and tabs for some of the dashboards delivered with the product. You can create custom dashboards for users at your institution and specify which tabs to display in the interface.
3	Page icons	Page icons let you create a new dashboard or edit the existing dashboard.

#	Item	Description
4	Performance charts and dashboard reports	Performance charts graphically display information that highlights performance measures important to the user of the selected dashboard. Dashboard reports highlight a list of key measures or attributes. Each delivered dashboard includes performance charts or dashboard reports for monitoring performance in a particular area of the institution.
5	Report Search	Report Search lets you search for reports by name. You can perform an advanced report search by selecting a search method, a report type, modification information, and which folders to search.
6	Reports list	When delivered, the Reports list links to all the reports included in the Reports folder. Click a folder to view the reports in that folder or click a report title to open that report. You can change the list of reports that is accessible from a dashboard
7	Help	Help provides links to information specific to the performance product including the product Handbook and Online Help.
		Note: The Help (?) icon on the Cognos Connection toolbar provides help about the Cognos Connection tools. That icon does not access this performance product help.

Working with dashboards

The delivered dashboards are intended to illustrate the kind of graphical content you can include in a dashboard. These dashboards are designed to be your starting point for reporting and analysis. You can use the dashboards as delivered, customize them for your institution, and use them as the basis to create additional dashboards.

Create a dashboard

The product is delivered with one Dashboard Template stored in the **Templates** folder and dashboard samples stored in the **Dashboards** folder. The easiest way to create a new dashboard that displays the components you desire is to edit either the Dashboard Template or one of the sample dashboards.

You can change one or all of the following items that display on a dashboard:

- the performance charts
- the list of accessible reports
- the product Help links
- 1. Review the sample dashboards stored in the **Dashboards** folder. If one of the samples includes information that you want to display on a new dashboard, use that sample as the basis for a new dashboard. Otherwise, use the Dashboard Template as the basis for a new dashboard.
- 2. Save the basis template (either the Dashboard Template or a sample dashboard) with a new unique name that identifies its function.
- **3.** Open the newly saved dashboard.
- **4.** Change which performance charts display on the dashboard. (See Related Links for detailed steps.)
- **5.** Change dashboard lists. (See Related Links for detailed steps.)
- **6.** Change help links. (See Related Links for detailed steps.)
- **7.** Save the dashboard.

Change a dashboard

The product is delivered with one Dashboard Template stored in the **Templates** folder and dashboard samples stored in the **Dashboards** folder. You can customize a delivered dashboard to meet your users specific needs by changing one or all of the following items: the performance:

- the performance charts
- the list of accessible reports
- the product Help links

Typically, you may want to change the performance charts that display on a dashboard to include charts used by a specific user or group of users at your institution. Though you have the option to change the list of accessible reports and the product Help links, it is less likely that you will need to change these aspects of a dashboard.

In addition, some performance charts require prompt input before they display. You can create "report view" versions of these charts which are saved versions of the chart that use

pre-defined prompt values. You can then include the report view charts in a customized dashboard.

- 1. Open the dashboard that you want to change.
- 2. Change which performance charts display on the dashboard. (See Related Links below for detailed steps.)
- 3. Change dashboard reports list. (See Related Links below for detailed steps.)
- **4.** Change help links. (See Related Links below for detailed steps.)
- **5.** Save all changes you made to the dashboard.

Change performance charts displayed on a dashboard

You can change the performance charts that display on a dashboard to display charts that are important to you. The performance charts delivered with the system are sized to correctly display in the Dashboard Template and sample dashboards.

- 1. Open the dashboard with the performance chart that you want to change.
- 2. Click on the toolbar of the performance chart that you want to change.
- **3.** For the **Title**, select to **Use the entry name** to use the report title as the title that displays for the performance chart or select **Type the title** and enter a **Title** for the report.
- 4. Click Select an entry.
- **5.** Select the performance chart that you want to display on the dashboard. You can navigate within the folder structure to find the performance chart you want.
- 6. Click OK.
- 7. Click **OK** again to apply the changes.

Change dashboard reports list

The delivered dashboards include access to all of the delivered reports via a reports list. You can change the list of reports accessible from a dashboard. For example, you may want to restrict a dashboard to only allow access to a subset of the reports, or you may want to point to a different directory of reports created by users at your institution. To change the dashboard reports list, do the following:

- 1. Open the dashboard with the reports list that you want to change.
- 2. Click on the Reports toolbar.
- **3.** Enter the **Title** for the reports list. This is the title that will display on the Reports toolbar.

- 4. Click Select a folder....
- 5. Select the folder that contains the reports you want to display on the dashboard. You can navigate within the folder structure to find the reports folder you want.
- 6. Click OK.
- 7. Under **Open links**, choose **In a new browser window** so that reports will open in a separate window when selected.
- **8.** Under **View Options**, specify the **Number of Entries** that can display in the reports list
- 9. Click OK.

Change help links on a dashboard

Help topics that are specific to the dashboards and scorecards display on the lower left side of a dashboard. Use the following steps to change the help topics that display in this area of a dashboard.

- 1. Open the dashboard with the help topics you want to change.
- 2. Click on the Help toolbar.
- 3. Enter the **Title** for the help area that will display in the Help toolbar.
- 4. Click **Select a folder...** to select the help that you want to display on the dashboard.
- 5. Select the folder that contains the help topics you want to display on the dashboard. You can navigate within the folder structure to find the help folder you want.
- 6. Click OK.
- 7. Under Open links, choose **In a new browser window** so that the help will open in a separate window when selected.
- **8.** Under **View Options**, specify the **Number of Entries** that can display in the help list.
- 9. Click OK.

Change number of entries displayed in a list

You can change the number of entries that display in a list on a dashboard. For example, you may want to change the number of reports that display in the list of reports so that you can see the entire list at one time. Use the following steps to change the number of entries that display in any list.

- 1. Click the My Area icon on the right side of the Cognos Connection toolbar.
- 2. Select My Preferences.

- 3. On the General tab, enter the desired number of objects in the **Number of entries in list view** field.
- 4. Click OK.

When you return to the interface, the lists will display up to the number of entries you specified.

Create a dashboard tab

You can set up a dashboard, either one of the delivered sample dashboards or a dashboard you create, so that it is accessible from a tab in Cognos Connection.

- 1. Open the folder where the dashboard is located. By default, this is the **Public Folders** > [**ProductName**] > **Dashboards** folder. If your institution customized the installation process, the dashboards may be stored in a different folder.
- 2. Locate the dashboard that you want to add to a tab.
- **3.** Click **More...** to the right of the dashboard's name.
- **4.** Click **Add to my portal tabs** from the available options.
- **5.** To rename the tab, click.
- 6. Click Edit this page.
- 7. Select the **General** tab.
- **8.** Change the name.
- 9. Click **OK**.

Delete a dashboard tab

You can delete a dashboard tab from the interface. Deleting a dashboard tab doesn't delete the source dashboard; it simply no longer displays the dashboard on a tab in the interface.

- 1. Select the tab that you want to delete to make it active.
- 2. Click Tab Menu located to the left of all the tabs.
- 3. Click **Remove this tab** from the list of actions.
- **4.** Click **OK** to confirm that you want to remove the tab.

6 Scorecard

Institutions use several layers of report data. The scorecard tells how your institution is doing compared to your goals (on a numbers or percentage basis) and the objectives you are measuring against. The scorecard enables operational managers and executives to see performance, and to provide the right information to each manager based on their role, interests, and specific measurable objectives.

Scorecards help achieve organizational goals by defining and measuring progress through agreed upon indicators that can be measured and that reflect success factors. The selected Key Performance Indicators (KPIs) must reflect your institution's goals in order for them to be key to your success. The KPIs must also be measurable, and be long-term considerations for your institution.

Progress toward KPIs is usually monitored on a monthly basis. You assign target (desired) values for each month, and then compare the targets with actual values. Actual values are normally extracted from your information system or data warehouse. You can then assess the difference between the target and the performance of the actual measures, and the progress toward achieving the related goals and objectives.

Student Retention Performance Scorecard

The Student Retention Performance product ships with the Institutional Retention scorecard that provides insights into the number of students registered and retained for each like or sequential academic period through completion of a program at your institution. It enables you to assess which students need support and to build support systems and programs that can improve relationships with your students.

To access the default scorecard, go to the **Public Folders > Student Retention Performance > Scorecards** page in Cognos and click **Institutional Retention Scorecard.**

You can target the following goals at your institution:

- Improve Engagement
- Improve Performance
- Improve Progression
- Improve Retention

Institutional Retention VP for Enrollment scorecard goals and objectives

The Institutional Retention scorecard addresses, but is not limited to, the following goals and objectives for your institution:

- Improve engagement:
 - Increase Interaction with Undergraduate Students
- Improve progression:
 - Improve Graduation Rates for Graduate Programs
 - Increase Full-Time Undergraduate Minimum Credits Passed
 - Increase Institution Graduation Rates to 90%
- Improve performance:
 - Increase Number Undergraduate Students in Good Standing
- Improve retention:
 - Increase Undergraduate Retention Rate
 - Increase Undergraduate Retention Rate each Academic Period
 - Increase Undergraduate Year 3 Retention Rate

Institutional Retention KPIs

The Institutional Retention scorecard includes the KPIs associated with the Banner Student Retention Performance Cognos packages. Progress toward these KPIs can be monitored on a monthly or annual basis and from the campaign start date through the current date.

KPIs for Improve Engagement goal

The Improvement Engagement allows your institution to monitor increase interaction and contacts with undergraduates. The Improve Engagement goal consists of the following objectives and KPIs.

Objective	KPI	Description
Increase Interaction with Undergraduate Students	Number of Advising Interactions for New First Time	Number of Advising Interactions for New First Time in their first year for a new first time.
Increase Interaction with Undergraduate Students	Percent New First Time Students with Advising Interactions	Percent New First Time Students with Advising Interactions intend to have 100% of new first time students have an appointment with an advisor.

KPIs for Improve Performance goal

The Improvement Performance goal allows your institution to monitor and increase the number of undergraduate students in Good Standing. This goal lists the objective to monitor and manage improvement of retained student performance. The Improve Performance goal consists of the following objectives and KPIs.

Objective	KPI	Description
Increase Number Undergraduate Students in Good Standing	Number Undergraduates with Academic Standing = Good	Number of undergraduate students with academic standing equal to good standing at the end of the academic period. Monitoring the number helps your institution to analyze and increase in the numbers from the previous year.

Objective	KPI	Description
Increase Number Undergraduate Students in Good Standing	Number Undergraduates with Academic Standing <> Good	Number of undergraduate students with academic standing not in good standing. Monitoring the number is with the intention of decreasing the number of students not in good standing from the previous year.
Increase Number Undergraduate Students in Good Standing	Number Undergraduates Below Cumulative GPA Threshold	Number of undergraduate students with cumulative GPA below the cumulative GPA threshold. Monitor this number after grades are rolled to history. Monitoring the number helps your institution to decrease from the previous year.

KPIs for Improve Progression goal

The Improve Progression goal allows your institution to monitor and manage improvement of retained student progression from year to year. This goal consists of the following objectives and KPIs.

Objective	KPI	Description
Improve Graduation Rates for Graduate Programs	Graduation Rate for Graduate Students	Percentage of increase in graduation rates for graduate students in any program of study or course. Comparing current year to prior year actual values helps the institution to determine the percentage of increase.
Increase Full-Time Undergraduate Minimum Credits Passed	Number Full-Time Undergraduates with =>12 Credits Passed in Academic Period	Increase full-time undergraduate students successfully completing =>12.00 credits per academic period.

Objective	KPI	Description
Increase Full-Time Undergraduate Minimum Credits Passed	Number Full-Time Undergraduates with < 12 Credits Passed in Academic Period	Increase full-time undergraduate students successfully completing <12.00 credits per academic period.
Increase Institution Graduation Rates to 90%	6 Year Graduation Rate	Percentage of increase in 6 year graduation rate should go up each year from the last since the graduation rate is cumulative from those in the first year through the next reported. After six years the majority of students in a four course of study or program should have graduated.

KPIs for Improve Retention goal

The Improve Retention goal allows your institution to monitor and manage improvement of the overall retention rates. This goal consists of the following objectives and KPIs.

Objective	KPI	Description
Increase Undergraduate Retention Rate	2 Year Retention Rate	Increase the undergraduate retention rate for each subsequent academic period. This KPI helps your institution to analyze the improvement over the previous year's retention rate. Any increase is considered as positive.
Increase Undergraduate Retention Rate	3 Year Retention Rate	Improvement over the previous year's retention rate. Any increase is considered as positive. Compare the current year to prior actual to determine the increase.
Increase Undergraduate Retention Rate each Academic Period	Undergraduates Sequential Retention Rate	Percentage of undergraduates who register in each sequential academic period from their academic period fist attended.

Objective	KPI	Description
Increase Undergraduate Year 3 Retention Rate	3 Year Retention Rate by College (Arts & Science)	The 3 Year Retention Rate by College (Arts & Science) is calculated by looking at only the registered headcount for students in this college.
Increase Undergraduate Year 3 Retention Rate	3 Year Retention Rate by College (Business Administration	The 3 Year Retention Rate by College (Business Administration) is calculated by looking at only the registered headcount for students in this college.
Increase Undergraduate Year 3 Retention Rate	3 Year Minority Retention Rate	Retention rates for Minority Students to Year 3.
Increase Undergraduate Year 3 Retention Rate	3 Year Retention Rate for Students - Need Not Fully Met	3 Year Retention Rate for Students where the student financial need was not fully met.

Scorecard components

This section briefly describes the scorecard components that you can set up.

Mission and vision statements

Your institution sets the mission and vision statements. They provide the overriding purpose or "big picture" goals for your institution. The mission and vision statement ensure that you are measuring the right things that will help you achieve your institutional goals and not just enrollment goals. Each scorecard has a mission and vision statement as defined by the strategy owner.

Goals and objectives

You create specific goals and related objectives that will help you achieve your institution's mission and vision. Goal details allow you to see the status of each measurable objective, immediately providing a graphical depiction of the current performance for each objective, as well as the underlying KPIs (or Key Performance Indicators) that are tracking measurable data related to each objective. (KPIs measure data related to the objective.)

Each goal page includes a performance indicator gauge that provides a succinct summary of the goal's status, a summary of the goal's objectives, and more information about the specific goal.

Strategies are the goals and objectives that are associated with a scorecard. You use the strategy element and strategy sub element in Metric Studio to build the goals and objectives that are associated with a scorecard. Each scorecard has a defined strategy with goals, objectives, KPIs, and initiatives for each year. The KPIs are attached to the objective level.

Metric types

Metric types define the attributes for a collection of metrics. Usually, a metric type identifies one aspect of performance, such as in-state applications. A metric type also defines calculations for the metric type, and for the actual, target, and tolerance metric values. Because metric type definitions are not usually stored in any existing databases, sometimes you must create them.

Metrics measure performance in key areas of a business, and compare current results to target values. A metric is a metric type placed on a specific scorecard with values. Metrics are assigned at the objective level.

Key Performance Indicators (KPIs)

KPIs are called metrics in Cognos Metric Studio. KPIs are created *before* the goals and objectives are created so that you can link them to the goals and objectives. The performance status of the goals and objectives are ultimately determined by the performance of the KPIs.

KPIs contain the most detailed level of information, including the targets, actuals, variances, and scores.

Progress toward KPIs is usually monitored on a monthly basis. You assign target (desired) values for each month and then compare the targets with actual values. Actual values are normally extracted from your information system or data warehouse. You can then assess the difference between the target and the performance of the actual measures, and the progress toward achieving the related goals and objectives.

KPIs represent the lowest level in the Scorecard. The performance status of the goals and objectives are ultimately determined by the performance of the KPIs. The KPI report provides additional detailed information for a specific KPI.

There are two step to creating KPIs (metrics). First, create a metric type, then create the corresponding metric.

Scores and gauges

Scores and gauges are calculated. Scores are computed based on factors set up for your scorecard. The main components are: actual values, target values, variances, and tolerances. Another important attribute of a score identifies the type of score. The target number represents the lowest value, the highest value or an exact value. In Metric Studio, the status of a metric is determined by its score.

Targets

Target (desired) values are assigned for each month and then compared to the actual values. You can then assess the difference between the target values and the performance of the actual measures, and the progress toward achieving the related goals and objectives.

You add or change targets by opening the metric and entering the targets or tolerance percentage into the chart.

Actuals

Actual values are the monthly totals from your Banner Enterprise Data Warehouse. Target values are the values you want to achieve and are set in the Cognos Metric Studio tool by your Scorecard Administrator.

Status indicators

Status indicators are representations of the performance of a metric, and help you check performance.

Trends

Trends indicate a change from the previous month's score. Trends can be upward, downward, or neutral if there was no significant change compared to the previous month.

By calculating the trend using the score instead of actual values, you prevent displaying a false positive. For example if you are measuring the number of deposits, the actual number of deposits will probably have gone up during the previous month. However, the score may show that the total number of deposits that should have been received up to this point is still going down. The score provides a more accurate assessment of the status of that metric.

Initiatives

Initiatives contain information related to specific action items associated with objectives. Initiatives are defined by your institution, usually as a plan to improve performance.

When you set up your scorecard, you indicate how you want the data to display. What data displays (what fields appear) can only be changed by Ellucian as a product enhancement. For example, you can indicate whether to display three versus five state states (Very Good, Exceptional, Marginal, Needs Improvement, Needs Action versus, Very Good, Marginal, Needs Action) at the bottom of the Goal report, but you cannot change what those states are called (Very Good versus. Excellent).

Scorecard pages

The scorecard is a series of Cognos Report Studio pages that constitute the executive interface of the Scorecard. The delivered pages are designed to pick up what the institution defines using the Cognos Metric Studio. This section identifies how to use Cognos Metric Studio and what you will see in the Scorecard Cognos Report Studio report pages listed. The pages are:

- "Plan the scorecard page" on page 6-10
- "Goal page" on page 6-10
- "Objective page" on page 6-11
- "Key Performance Indicators (KPI) page" on page 6-12
- "Initiatives page" on page 6-12

Plan the scorecard page

Plan Scorecard is the first page in the scorecard. It contains a mission statement, a vision statement and a performance summary of the strategic plan's goals and objectives. Each goal and objective is a link to other pages that contain more information related to that goal or objective.

The first page of the scorecard can handle many Goals/Objectives. It is designed to display two goals on a row. Each goal can have as many objectives as needed because the objective box expands. There can be as many rows of goals as needed. In the sample there are three goals, so two rows are needed. If there were seven goals, there would be four rows (two goals can fit on a row).

Goal page

The Goal page provides additional details related to the Plan's goals for a specific period of time. It allows the goal's performance and summary information, and information associated with its objectives and their KPIs (Key Performance Indicators) to be viewed on one page. The goals on this page are the links in the shaded portion of the page. In the example above, Grow Enrollments is a goal.

The Performance gauge provides a summary of the goal's status (the goal above needs improvement), a summary of the goal's objectives (Objective section), and additional information about the goal such as a description and goal owner (Information section). The table at the bottom of the report has a status indicator for each of the goal's objectives. The example provides a link that returns to the Plan Scorecard page where you can view the performance of other goals or objectives, and links that enable you to access objective or KPI information. Metrics are displayed as KPIs in the scorecard.

You can drill into goal details. Goal details allow you to see the status of each measurable objective, providing a graphical depiction of the current performance for each objective, as well as the underlying KPIs that are tracking measurable data related to each objective.

The Goal page provides the following time period information at the KPI level:

• Performance Status

Variance Values

Trend Status

• % Variance Value

Actual Values

Score

· Target Values

· Owner name

Objective page

Each goal within the Plan Scorecard page framework has objectives. The Objective page provides additional detailed information related to each goal's objectives and their underlying KPIs (Key Performance Indicators) on one page. Metrics are displayed as KPIs in the scorecard. The Performance gauge provides a summary of the goal's status (increased to 400 Minority Enrollments and needs improvement), a summary of the objective's KPIs (Key Performance Indicators section) and additional information such as a description and objective owner, associated initiatives (Properties section). The report also contains a table of performance information related to the objective's underlying KPIs.

The table at the bottom of the report provides an overview of the objective's KPIs. This report also provides a links that returns you to the Scorecard Plan or the objective's Goal report. Specific KPI information can also be accessed by double clicking one of the KPI names listed in the summary table at the bottom of the report.

The Objective report provides the following time period information at the KPI level:

- Performance Status
- Trend Status
- · Actual Values
- · Target Values
- Variance Values
- % Variance Value
- Score
- · Owner name

Initiatives page

Initiatives contain information related to specific action items associated with plan objectives. You can access this information through a link in the Properties section of the Objective page.

Each Initiative has the following properties:

- Initiative Title
- Initiative Description
- Planned State Date
- Actual State Date
- · Planned Finish Date
- · Actual Finish Date
- Percent Complete
- · Owner Name

Each objective can have multiple initiatives. The information contained in these pages must be entered by the initiative owner using Cognos Metric Studio. You can return the Initiative pages' associated Objective (Increase to 200 Foreign Enrollments in this case), the specific objective's Goal page, or the Plan Scorecard.



Initiatives must be updated manually. They are not automatically updated based on monthly data refreshes.

Key Performance Indicators (KPI) page

Scorecards help achieve organizational goals by defining and measuring progress through indicators that can be measured and that reflect success factors. The selected Key Performance Indicators (KPIs) *must* reflect your institution's goals in order for them to be key to your success. The KPIs must also be measurable, and be long-term considerations for your institution.

Progress toward KPIs is usually monitored on a monthly basis. You assign target (desired) values for each month and then compare the targets with actual values. Actual values are normally extracted from your information system or data warehouse. You can then assess the difference between the target and the performance of the actual measures, and the progress toward achieving the related goals and objectives.

KPIs represent the lowest level in the Scorecard. The performance status of the goals and objectives are ultimately determined by the performance of the KPIs. The KPI report provides additional detailed information for a specific KPI.

Deliver master scorecard

A sample master scorecard is delivered with Enrollment Management Performance. You can use the delivered scorecard as defined with a set of goals and objectives for the recruiting and admissions cycle. It includes metrics with admissions and financial aid data from the PM Analyze Enrollment Funnel package. Alternately, you can use Cognos Metric Studio and any one of the delivered Cognos Framework Manager packages to customize the scorecard to meet your needs.

You should create the scorecard components in the following order.

- 1. "Mission and vision statements" on page 6-15
- 2. "Goals and objectives" on page 6-28
- 3. "Key Performance Indicators (KPIs)" on page 6-16
- 4. "Create metric types" on page 6-17
- 5. "Create metrics" on page 6-18
- 6. "Scores and gauges" on page 6-19
- 7. "Status indicators" on page 6-21
- **8.** "Trends" on page 6-24
- 9. "Initiatives" on page 6-31

Related scorecard and Metric Studio objects

Cognos Metric Studio is used to create and maintain the data elements needed for a scorecard. As you create and link strategies (scorecard names), strategy elements (goals/objectives), metrics (key performance indicators), and projects (initiatives) you are building the individual pieces that together are viewed in the Scorecard report.

You may need to complete any of the following tasks in Cognos Metric Studio to maintain the scorecards.

Object in the scorecard	Corresponding object in Metric Studio	
Mission	Strategic Objective (Strategy) Technical Description field	
Vision	Strategic Objective (Strategy) Description field	
Goal	Second level strategy element	
Objective	Third level strategy element	

Object in the scorecard	Corresponding object in Metric Studio
KPI	Create or update KPI by creating or updating the metric types or metrics. Metrics are linked to objectives.
Initiative	Create an initiative by creating a new project on the Scorecard Project tab. You <i>must</i> link the initiative to a goal or objective in the Strategies pane.

Create or update a scorecard

You can create a new scorecard in Cognos Metric Studio or update an existing one.

A scorecard is made up of several objects within Cognos Metric Studio. Some of these objects are placeholders that have other elements attached to them. The scorecard is the first of several objects that you create to build a complete scorecard.

- 1. Open the dashboard, or open Cognos Connection and point it to Public Folders tab.
- 2. Click **Launch** located in the upper right hand corner.
- 3. Select Metric Studio.
- **4.** Select *CMM_Ellucian* from the **Recently Used Packages** field.

Your institution may have its own packages. If the package that you want is not listed, you can select it from the list of all packages.

- **5.** Click **Scorecards** in the lower left pane.
- **6.** Highlight the link in the Scorecards list below which you want this scorecard to be created. In this way you can create multiple levels of scorecard.
- Note

Do not click any link if you want this scorecard to be a first level scorecard.

- 7. Click the **New Scorecard** icon at the top of the Scorecard pane.
- **8.** Click the **General** tab.
- **9.** Under **Language**, select the language that you want.
- **10.** Enter a name for the scorecard in the **Name** field.
- 11. (optional) Type the description of the scorecard in the **Description** field.
- **12.** (optional) Type a technical description, such as information about the data source, in the **Technical Description** field.

- **13.** (optional) If you want to change the owner of the scorecard, click the **Change owner** link and select the new owner.
- **14.** Select the group to use by default when opening this scorecard from the **Default grouping** drop-down list.
- **15.** Enter *SC*-(*scorecard name*) in the **Identification Code** field.
- Note

The *SC* stands for scorecard. By entering your own identification code, you can find and attach items. If you do not enter an identification code, the system provides a randomly generated code for you.

- **16.** If you want to set security for the scorecard, click the **Permissions** tab and click **Edit** to add Security.
- 17. Click OK.

Mission and vision statements

Each scorecard has a mission and vision statement as defined by the strategy owner. The mission statement is stored in the **Description** field of the Strategy and the vision statement is stored in the **Technical Description** field of the strategy.

Create and update mission and vision statements

You can update the vision or mission statement by reopening the strategy (strategic objective) and updating the **Description** and **Technical Description** fields.

- 1. Open the dashboard, or open Cognos Connection and point it to Public Folders tab.
- 2. Click **Launch** located in the upper right hand corner.
- 3. Select Metric Studio.
- **4.** Select *CMM_Ellucian* from the **Recently Used Packages** field.

Your institution may have its own packages. If the package that you want is not listed, you can select it from the list of all packages.

- **5.** Click **Strategy** in the lower left pane.
- **6.** Click the strategy you want to update.
- 7. Click **Details** in the upper right side of the window.
- **8.** Click the **Set Properties** icon in the upper right side of the page.

- **9.** Enter the vision in the **Description** field.
- **10.** Enter the mission in the **Technical Description** field.
- **11.** Click **OK**.

Key Performance Indicators (KPIs)

Key Performance Indicators (KPIs) are called metrics in Cognos Metric Studio. KPIs are created *before* the goals and objectives are created so that you can link them to the goals and objectives. They represent the lowest level in the Scorecard. The performance status of the goals and objectives are ultimately determined by the performance of the KPIs.

KPIs contain the most detailed level of information, including the targets, actuals, variances, and scores. Target (desired) values are assigned for each month and then compared to the actual values. You can then assess the difference between the target values and the performance of the actual measures, and the progress toward achieving the related goals and objectives.

There are two step to creating KPIs (metrics). First, create a metric type, then create the corresponding metric. Below is a sample KPI page.

Delivered KPIs

There are several delivered Key Performance Indicators (metrics) available that you can use instead of creating your own.

Follow the steps to view a list of delivered metrics.

- 1. Open the dashboard, or open Cognos Connection and point it to Public Folders tab.
- 2. Click **Launch** located in the upper right hand corner.
- 3. Select Metric Studio.
- **4.** Select *CMM_Ellucian* from the **Recently Used Packages** field.

Your institution may have its own packages. If the package that you want is not listed, you can select it from the list of all packages.

- 5. Click **Metric Types** in the lower left pane.
- **6.** Click the Metric Type you want to view.
- 7. Click the **Metrics** tab.

Create metric types

Metric types define the attributes for a collection of metrics. Usually, a metric type identifies one aspect of performance, such as in-state applications. When you select a metric type, Metric Studio shows the metrics that belong to that metric type regardless of which scorecard the metric belongs to.

Because metric type definitions are not usually stored in any existing databases, sometimes you must create it. You can assign diagrams and reports to a metric type so that they appear on the diagram and report tab for every metric of that metric type.

A metric type also defines calculations for the metric type, and for the actual, target, and tolerance metric values. You can compute user defined columns using user defined equations. The calculation for the metric type applies to all the metrics that belong to it. You could also define a calculation for an individual metric that overrides a calculation defined for the metric type. A metric type does not contain other metric types.



Since there is a one-to-one relationship between metrics and metric types, it is easier to assign metric types to objectives and assign the rollup weights to the metric types.

To create a metric type:

- 1. Open the dashboard, or open Cognos Connection and point it to Public Folders tab.
- 2. Click **Launch** located in the upper right hand corner.
- 3. Select Metric Studio.
- **4.** Select *CMM Ellucian* from the **Recently Used Packages** field.

Your institution may have its own packages. If the package that you want is not listed, you can select it from the list of all packages.

- **5.** Click **Metric Types** in the lower left pane.
- **6.** Click the **New Metric Types** icon at the top of the Metric Types pane.
- 7. Enter the name of the metric type in the **Name** field.

8. Enter the ID in the **Identification Code** field. Begin the ID with *MT*-.

Note

The MT stands for metric type. By entering your own identification code, you can easily find and attach items. If you do not enter an identification code, the system provides a randomly generated code for you.

- 9. Click the Columns and Calculations tab.
- **10.** Select *Rollup is last of individual value* in the **Business calendar rollup calculation** field for Actual, Target, Tolerance, and User Defined Columns.
- 11. Select Last Year Value in the Column field under the User Defined Columns section.
- **12.** Scroll to the top of the page.
- 13. Click the **Status Indicator** tab.
- **14.** Select a performance pattern or use the default. (See <u>"Status indicators" on page 6-21.</u>)
- **15.** Click **OK**.

Create metrics

Metrics measure performance in key areas of a business and compare current results to target values. A metric is a metric type placed on a specific scorecard with values. Metrics are assigned at the objective level, not at the goal level. For example, if the applicant rate is low then the Applicant metric shows a red status indicator to show a negative result.

Each metric has its own metric type rather than having more generic metric types along with qualifiers. This simplifies creating and maintaining metrics. While this approach does not scale as well as using qualifiers, it is technically less challenging while meeting the current requirements. You should sort your metric types in the order in which you want them to appear on the metric lists on the "Goal page" on page 6-10 and "Objective page" on page 6-11.

Prerequisites

- Create one metric type per metric
- 1. Open the dashboard, or open Cognos Connection and point it to Public Folders tab.

- 2. Click Launch located in the upper right hand corner.
- 3. Select Metric Studio.
- **4.** Select *CMM_Ellucian* from the **Recently Used Packages** field.

- 5. Your institution may have its own packages. If the package that you want is not listed, you can select it from the list of all packages.
- **6.** From Metric Studio, click **Scorecards** in the lower left pane.
- 7. Click the scorecard to which you want to add a metric.
- **8.** Click the **Metrics** tab.
- 9. Click the **New Metric** icon in the upper right corner of the tab.
- **10.** Click the **Choose metric type** link.
- 11. Click the radio button next to the metric type you want to include.
- **12.** Click **OK**.
- **13.** Enter *M* in the **Identification Code** field.
- Note

The *M* stands for metric. By entering your own identification code, you can easily find and attach items. If you do not enter an identification code, the system provides a randomly generated code for you.

14. Click OK.

Scores and gauges

Scores and gauges are calculated. Scores are computed based on factors set up for your scorecard. The main components are: actual values, target values, variances, and tolerances.

In Metric Studio, the status of a metric is determined by its score. A score is a numerical representation that determines whether a metric is on target, above target, or below target and by how much. Whether a metric is above target or below target is determined by the tolerance value set for the metric. The default tolerance for metrics is 10% above or below target.

Actual	Target	Variance	Variance %	Score
26,400	23,000	3,400	15%	2.96
9,420	9,100	320	4%	0.70
5,100	5,100	0	0%	0.50
2,150	2,100	50	2%	0.02
2,010	2,000	10	0%	0.40

Variance of 15 divided by tolerance unit of 5=3 units/score of 3.

Score and gauge component	Description
Actual values	The monthly totals from your Banner Enterprise Data Warehouse.
Target values	Values you want to achieve, and are set up in Cognos Metric Studio by your Scorecard administrator
Variance	The difference between the actual values and the target values. Variance is displayed as both an amount and percent in the table.
Tolerance	Percent or amount of variance that is acceptable before you are alerted. Tolerance is used to calculate the scores on the gauges, the status indicators, and the trend status.

Example

If an incoming class of 800 is expected, and you are short two students, you may not want to be notified. However, if an incoming class of 800 is expected and you are short 200 students, you probably want to be notified in time to correct the shortfall.

For each tolerance unit that you are away from the target, you receive a score of 1. In the example above, the tolerance is 5%. Since the variance for the first KPI is almost 15% (the example is rounded up), the score for the first KPI is almost 3. The total score of all the KPIs combined is shown as the final score in the Performance gauge.

Actual	Target	Variance	Variance %	Score
26,400	23,000	3,400	15%	2.96
9,420	9,100	320	4%	0.70
5,100	5,100	0	0%	0.50
2,150	2,100	50	2%	0.02
2,010	2,000	10	0%	0.40



The final factor that influences the score and status indicators is the performance pattern. The performance pattern is set when the metric type for KPI is created (type of score). There are three types of patterns:

Above is positive

Example

Inquiries and applications are measures where the more you receive inquiries and applications, the more positive it would be for your institution.

• Below is positive

Example

Controlling costs is a measure where the further you are below your target, the more positive the score

Neutral from center

Example

Number of enrolled students is a measure where the closer to the target, the better the score. Too much variance on either side is not a good score. For example, if too few students enrolled, that would be negative because the institution is under-enrolled. However, too many enrolled students would be equally bad because there would be a lack of space.

Status indicators

Status indicators in Metric Studio are representations of the performance of a metric, and help you check performance quickly. The status is indicated using a colored, three or five-state (set by your institution) status. The default is the three-state status indicator. The delivered status indicators display throughout the scorecard.



An acceptable marginal performance can be within a tolerance level (see "Scores and gauges" on page 6-19) on either side of your target. A marginal score can be either just above or just below (for instance, within 5%) your target. The acceptable score is slightly above target (within 5-10%), and the very good score is 10% over the target (assuming a 5% tolerance).

The status indicators are determined by the range of the score.

Status	Score
Very good	Above 4.5
Acceptable	Between 3.5 and 4.5
Marginal	Between 2.5 and 3.5
Needs improvement	Between 1.5 and 2.5
Needs action	Below 1.5

The colors of the status indicators represent the following.

Color	Description
Green	One tolerance or more above target
Yellow	Within one tolerance above or below target
Red	More than two tolerances below target.
	When you select a five-state status indicator, users see more detail about how far above or below target the metric is.
	The symbol and color depend on how the metric performs compared to the target and are based on the tolerances you set
Green	More than one tolerance above target
Partially green	Within one tolerance above target
Yellow	Within one tolerance above or below target
Partially red	More than one tolerance below target
Red	More than two tolerances below target

Set the number of status indicators

The default status indicator in Metric Studio is set to three-state. You can display five-state indicators instead. You can also choose the type of graphic to associate with each status indicator.

- 1. Open the dashboard, or open Cognos Connection and point it to Public Folders tab.
- 2. Click **Launch** located in the upper right hand corner.
- 3. Select Metric Studio.
- **4.** Select *CMM_Ellucian* from the **Recently Used Packages** field.

Your institution may have its own packages. If the package that you want is not listed, you can select it from the list of all packages.

- 5. In the **Tools** list, click **Status indicators**.
- **6.** Click **3 state** or **5 state** to select the number of states you want to show.
- 7. Click OK.

Set up the type of status indicators

You can choose to use one of the three default status indicator types, or you can add your own set of status indicator graphics.

- 1. Open Cognos Connection.
- 2. Click the Launch link
- 3. Select Metric Studio
- 4. Click the **Tools** link.
- 5. Click Status indicators.
- **6.** Under Manage status indicator graphics, select the style of status indicator graphics that you want to use.
- **7.** Click the corresponding icon in the **Actions** column to set the properties for the image.

The default graphic is Traffic lights.

8. Click OK.

Choose the status indicator style

Use this option to specify how you want the status indicator to appear on the page.

- 1. Open the dashboard, or open Cognos Connection and point it to Public Folders tab.
- 2. Click Launch located in the upper right hand corner.
- 3. Select Metric Studio.
- **4.** Select *CMM_Ellucian* from the **Recently Used Packages** field.

Your institution may have its own packages. If the package that you want is not listed, you can select it from the list of all packages.

- **5.** Click the **Tools** link.
- 6. Click Default Display Settings.
- 7. Under the General tab, select *Check Symbols* from the drop down list in the **Status Indicator Style** field.
- 8. Click OK.

Trends

Trends indicate a change from the previous month's score. Trends can be upward, downward, or neutral if there was no significant change compared to the previous month.

If you calculate the trend using the score instead of actual values, you prevent displaying a false positive. The score provides a more accurate assessment of the status for that metric.

Example

If you are measuring the number of deposits, the actual number of deposits probably went up during the previous month. The score, however, shows that the total number of deposits that should have been received so far is still going down.

Add or change targets

Target (desired) values are assigned for each month and then compared to the actual values. You can then assess the difference between the target values and the performance of the actual measures, and the progress toward achieving the related goals and objectives.

You can add or change targets by opening the metric and entering the targets or tolerance percentage into the chart.



If you previously loaded data you only need to update the target and tolerance. The Last Year Value information can be added manually if not previously loaded.

To add or change targets, perform the following steps.

- 1. Open the dashboard, or open Cognos Connection and point it to Public Folders tab.
- 2. Click **Launch** located in the upper right hand corner.
- 3. Select Metric Studio.
- **4.** Select *CMM_Ellucian* from the **Recently Used Packages** field.

Your institution may have its own packages. If the package that you want is not listed, you can select it from the list of all packages.

- **5.** Click **Metric Types** in the lower left pane.
- **6.** Click the metric type you want to view.
- 7. Click the **Metrics** tab at the top of the page.
- **8.** Click the link of the name of the metric.
- **9.** Click the **List** icon.

The data in a table displays.

10. Click Chart.

The data in a chart displays.

11. Click the **Enter Values** icon (it looks like a pencil) just below the Details tab in the upper right part of the screen.

The Edit Metric Values window opens.

12. Change the target and tolerance values as needed.



This data can be imported using an Excel spreadsheet. Pay attention to the date at the top of the metric value chart – if you need to change the year, click on the year.

- 13. Click OK.
- **14.** Click the **Tools** menu link in the upper right hand corner.
- **15.** Click **Metric Maintenance** from the Tools menu in the upper right corner of the page.

You return to Cognos Connection.

- **16.** Click **Recalculate Metric Store Derived Values** from the list to run the job.
- 17. Click **OK**.
- **18.** Click the **Return** icon to return to Metric Studio or select **Launch** > **Metric Studio**.



The Last Year Value field is a user defined field that is delivered with the sample scorecard (See "Add user defined columns" in the Banner Student Retention Performance Administration Guide). If you create new metrics, you need to associate the Last Year Value to the new metric. The Last Year Value can be entered manually either from Cognos Metrics Studio, or bulk loaded using flat files (See "Use tab-delimited files to bulk load data" in the Banner Student Retention Performance Administration Guide.). The Last Year Value should be loaded at the same time as Targets and Tolerances.

This data can be gathered in two ways to simplify loading:

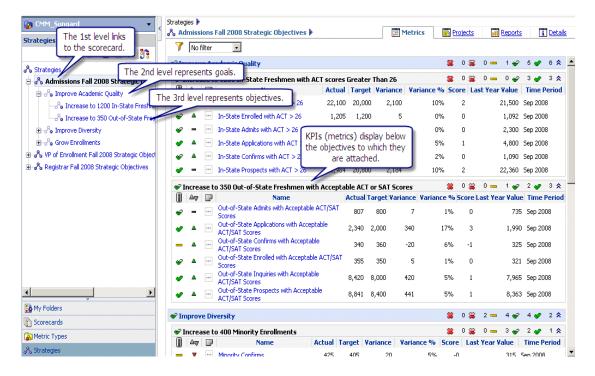
- You can export last year's metrics to flat files to get the data
- You can run reports from the snapshot tables in Banner EDW to get last year's actuals.



Leading "0" values should not be entered for Last Year Value.

Link scorecards, strategies, and metrics

Strategies are the Metric Studio objects that connect everything together. Strategies are also used to create goals and objectives. In the graphic below, you can see how each level of strategies represents a level in the scorecard itself.



Perform the following steps to link scorecards and strategies.

- 1. From Cognos Connection, click the **Launch** link.
- 2. Select Metric Studio.
- 3. Select *CMM_Ellucian* in the **Recently Used Packages** field.



Your institution may have its own packages. If the package you want to use is not listed in the **Recently Used Packages** field, you can select it from the list of all packages.

- **4.** Click **Strategies** in the lower left pane.
- 5. Click the **New Strategy** icon at the top of the Strategies pane.
- **6.** Enter the strategy name in the **Name** field.
- **7.** Type the vision statement in the **Description** field.
- **8.** Type the mission statement in the **Technical Description** field.

9. Enter the strategy code **Identification Code** field.



The ST stands for Strategy. By entering your own identification code, you can easily find and attach items. If you do not enter an identification code, the system provides a randomly generated code for you.

10. Click **Display Other metrics strategy element** checkbox in display options.

Goals and objectives

Strategies are the goals and objectives that are associated with a scorecard. In Metric Studio terminology, goals and objectives are called strategies. Goals are created in Metric Studio as 2nd level strategies and objectives are created as 3rd level strategies.

Each scorecard has a defined strategy with goals, objectives, KPIs, and initiatives for each year. The description of each goal and objective is stored in the **Description** field for the corresponding strategy element. The KPIs are attached to the objective level.



Since there is a one-to-one relationship between metrics and metric types, it is easier to assign metric types to objectives and assign the rollup weights to the metric types.

Create and update goals (Metric Studio strategies)

In Metric Studio, goals are 2nd level strategies. Edit or add a strategy under the Strategic Objective (scorecard) level.

- 1. From Cognos Connection, click the **Launch** link.
- 2. Select Metric Studio.
- 3. Select *CMM Ellucian* in the **Recently Used Packages** field.



Note

Your institution may have its own packages. If the package that you want to use is not listed in the Recently Used Packages field, you can select it from the list of all packages.

- **4.** Click **Strategies** in the lower left pane.
- 5. Click the strategy at the top of the Strategies pane to which you want to add goals.
- **6.** Click the **New Strategy Element** icon at the top of the Strategies pane.

7. Enter the name of the goal in the **Name** field. Enter *G*- (name of goal) in the Name field.



The *G* stands for goal. By entering your own identification code you can easily find and attach items. If you do not enter an identification code, the system provides a randomly generated code for you.

- **8.** Select **Weighted Average** from the drop down box in the Status Calculation.
- 9. Click OK.

You should link metrics to the objective. Before a metric can be linked with an objective it must be linked to the linked scorecard.

Create and update objectives in Metric Studio strategies

In the Scorecard, each goal has objectives. The Objective page provides more detailed information related to each goal's objectives and their underlying KPIs on one page. In Metric Studio, objectives are 3rd level strategies. You can create a strategy under the goal level.

- 1. From Cognos Connection, click the **Launch** link.
- 2. Select Metric Studio.
- 3. Select *CMM_Ellucian* in the **Recently Used Packages** field.



Your institution may have its own packages. If the package that you want to use is not listed in the Recently Used Packages field, you can select it from the list of all packages.

- **4.** Click **Strategies** in the lower left pane.
- 5. Click the goal to which you want to add an objective.
- **6.** Click the **New Strategy Element** icon at the top of the Strategies pane.
- **7.** Enter *Obj*-(name) of the objective in the **Name** field.



The *Obj* stands for objective. By entering your own identification code, you can easily find and attach items. If you do not enter an identification code, the system provides a randomly generated code for you.

8. Select **Weighted Average** from the drop-down box in the Status Calculation.

- 9. Click OK.
- **10.** From the **Metrics** tab, click the **Specify the metric and metric types that can display** icon in the top right corner of the Metrics tab window (it looks like a pencil).
- 11. Click the **Add** link.
- **12.** Click the **Metric Types** link.
- **13.** Click the checkbox next to the metrics you want to add to the objective.
- **14.** Click **OK**.
- **15.** Click the checkbox next to all of the metric types you selected.
- **16.** Click **OK**.

You should see the KPIs (metrics) associated with your objective.

Assign an owner

You can assign an owner to a goal, objective, or KPI.



If your institution's data is not set up to connect to Cognos, you cannot assign an owner.

- 1. From Cognos Connection, click the **Launch** link.
- 2. Select Metric Studio.
- 3. Select *CMM_Ellucian* in the **Recently Used Packages** field.



Your institution may have its own packages. If the package that you want to use is not listed in the Recently Used Packages field, you can select it from the list of all packages.

- **4.** From Metric Studio, click **Strategies** in the lower left hand pane.
- **5.** Click the goal or objective strategy that you want to assign to an owner.
- **6.** Click the **Details** tab.
- 7. Click the **Set properties** icon in the upper right hand corner.
- **8.** Click the **Change owner** link.

- **9.** Navigate to the person to whom you want to assign the task.
- **10.** Click the radio button next to the person's name.
- **11.** Click **OK**.
- 12. Click OK again.

Initiatives

Initiatives contain information related to specific action items associated with objectives. In Metric Studio, initiatives are created from the Project tab of a scorecard. Initiatives are defined by your institution, usually as a plan to improve performance. You can access this information through a link in the Properties section of the Objectives page.

Create initiatives

Each objective can have multiple initiatives, and the information must be entered by the Scorecard Administrator in Cognos Metric Studio.



Initiatives must be updated manually. They are not automatically updated based on monthly data refreshes.

- 1. From Cognos Connection, click the **Launch** link.
- 2. Select Metric Studio.
- **3.** Select the *CMM_Ellucian* package.



Your institution may have its own packages. If the package you want to use is not listed in the Recently Used Packages field, you can select it from the list of all packages.

- **4.** Click **Scorecards** in the pane list in the lower left hand corner.
- **5.** Click the scorecard to which you want to add the new initiative.
- **6.** Click the **Projects** tab.
- 7. Click the **New Project** icon.
- **8.** Enter a name for the initiative in the **Name** field.
- **9.** Enter a description of the initiative in the **Description** field.

10. Enter *I-*(*the name of your initiative*) in the **Identification Code** field.



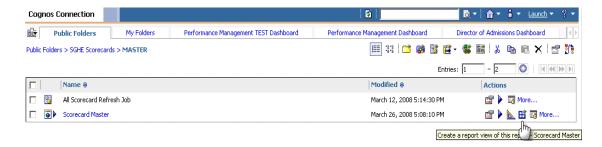
The *I*- stands for initiative. By entering your own identification code, you can easily find and attach items. If you do not enter an identification code, the system provides a randomly generated code for you.

- **11.** Scroll down to the Progress area.
- 12. Enter a Planned Start and Finish date.
- **13.** (optional) Enter an Actual Start or Finish date.
- **14.** Enter a percent in the **Percent Complete** field.
- **15.** Click **OK**.
- **16.** Click the **Strategies** pane.
- **17.** Click the goal or objective to which you want to attach the initiative.
- **18.** Click the **Projects** tab.
- **19.** Click the **Specify the Projects . . . element** icon.
- **20.** Click the **Add** link.
- **21.** Navigate to the project you created.
- 22. Click the checkbox next to your project
- 23. Click OK.
- 24. Click OK again.

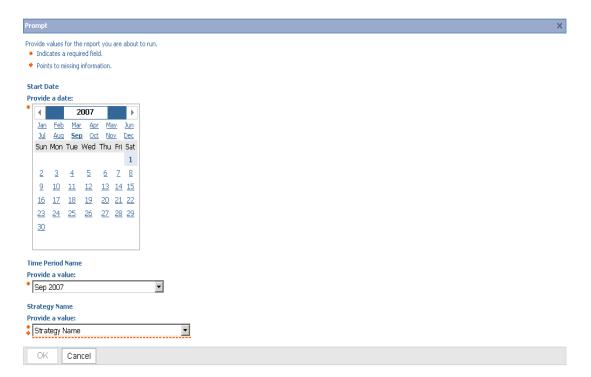
Create a scorecard report view

There is one master report that creates a single output that contains a strategy and all the corresponding goals, objectives, KPI and initiatives. This report contains a prompt for a single strategy (defined in the Strategies section). Each strategy has a report view of this report with the correct strategy selected as a saved prompt. That report is scheduled to run nightly to refresh any content added during the day. This report view exists in the Scorecard folder that is accessed by the end users. The master report exists in a Master folder that is accessible to system administrators and report developers. The report is coded to select the current time period minus one month. That is, if the current date is March 16, 2008, the report runs for all time periods up to February 2008. In this way, there

is only one report view needed for each strategy and that view is automatically refreshed when the months change.



In the Prompt window, select the date and strategy name of the scorecard you created. This links the correct scorecard strategy to the scorecard template so that the new scorecard displays properly.



To create a scorecard report view:

- 1. From Cognos Connection, click the **Public Folders** tab.
- 2. Click the **Scorecard** folder or your institution's scorecard folder.
- 3. Click the Master folder.
- 4. Click the **Create Report View** icon in the **Actions** column.

- **5.** Enter the scorecard name in the **Name** field.
- **6.** Click the **Select another location** link.
- 7. Click **Scorecards** or your institution's scorecards link from the breadcrumb path at the top of the page.
- 8. Click OK.
- 9. Click Finish.
- **10.** Click **Scorecards** or your institution's scorecards link from the breadcrumb path at the top of the page.
- **11.** Click the **Set properties** icon in the **Actions** column next to the scorecard view that you created.
- **12.** Click the **Report View** tab.
- **13.** Uncheck the **Prompt for values** checkbox.
- **14.** Click the **Set** link above **the Prompt for values** checkbox.
- **15.** Select a year in the **Time Period Name** field.
- **16.** Select a strategy name in the **Strategy Name** field.
- **17.** Click **OK**.
- 18. Click OK again.
- 19. Click the scoreboard title link to review the scoreboard.
- **20.** Navigate through the report as desired.
- **21.** Click the **Return** icon to return to the **Scorecard** folder or your institution's scorecard folder.

Schedule a scorecard refresh job

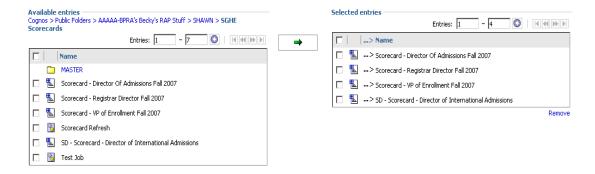
You can create a single job that refreshes all the scorecards automatically on a monthly basis. Click the **New Job** icon just below the tabs at the top of the page. A wizard opens that walks you through each step of scheduling the job.

Perform the following steps to schedule a scorecard refresh job.

- 1. From Cognos Connection, click the **Public Folders** tab.
- 2. Open the **Scorecard** folder or your institution's scorecard folder.
- 3. Click the **New Job** sicon at the top of the page.
- **4.** Enter a name of the job in the **Name** field.
- 5. Click Next.

The Select the Steps window opens with no entries displayed.

- **6.** Click the **Add** link below the **Steps** field.
- **7.** Check the checkbox next to each scorecard you want to schedule.
- 8. Click the green Add arrow to add the scorecards to the Selected Entries field.



- 9. Click **OK**.
- 10. Click the In Sequence radio button below Submission of Steps.
- 11. Check the Continue on error checkbox.
- 12. Click Next.
- 13. Click the Save and schedule radio button.

14. Click Finish.

The Schedule window opens.

15. Select the day and time you would like to schedule the job to run.

16. Click **OK**.

Once the extracts are published to the content store, the jobs may need to be altered and then scheduled as desired. It is important to pay attention to how the jobs run the extracts. You may run the extracts in either parallel or a series. This depends largely on the hardware environment. If you have ample CPU and RAM, and system usage is low during the scheduled time, consider running the extracts in parallel, but be careful not to run too many in parallel because Banner EDW receives all the queries at once and it could become a bottleneck.

7 Architecture

The Banner Operational Data Store (Banner ODS) and the Banner Enterprise Data Warehouse (Banner EDW) are the data warehouse components of the Banner Performance Reporting and Analytics Business Intelligence platform. The following sections describe the architecture of this platform and the roles and integration of ODS and EDW with the other components.

BPRA product architecture

The complete suite of BPRA products provides comprehensive content across areas such as student, financial aid, finance, accounts receivables, human resources and advancement giving your institution the ability to take full advantage of the data stored in your source system by turning it into applied knowledge in the warehouse. You can use the BPRA products together to help you make informed decisions, to guide strategic institutional planning and forecasting based on analysis of historical trends, and to enhance institutional performance.

The BPRA solution set includes the following products:

- Banner Operational Data Store (Banner ODS)
- Banner Enterprise Data Warehouse (Banner EDW)
- Advancement Performance (AP)
- Banner Recruiting and Admissions Performance (Banner RAP)
- Banner Student Retention Performance (Banner SRP)



Your institution may license some or all of the BPRA products. If you do license multiple BPRA products, it is important that you understand the relationship among all of the products as you use them.

The following figure illustrates the components of the BPRA suite of products.

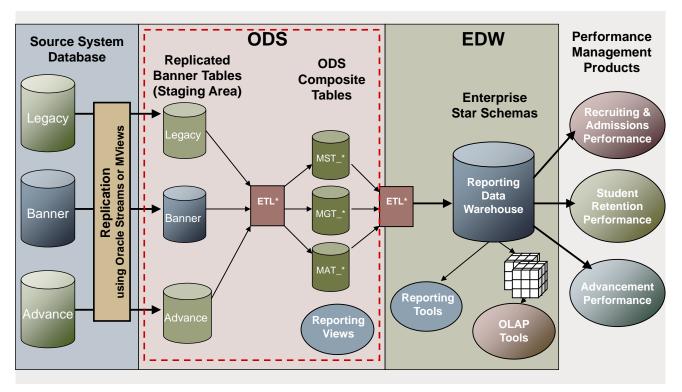


Figure 6: BPRA product architecture

Source system database

The starting point for any performance or reporting analysis solution is your source system data. The information stored in the source transactional database is ultimately the information that you want to analyze.

The BPRA products are specifically designed to accept information from the Banner and Advance products. However, the BPRA products use an open design and can accept information from other sources as well. References to the "source" database refer to whichever source product you use, typically Banner or Advance.

Target database

The "target" database refers to the database where you load information from the source database. Depending on the way you license your BPRA products, this may be the Banner ODS or Banner EDW database or both.

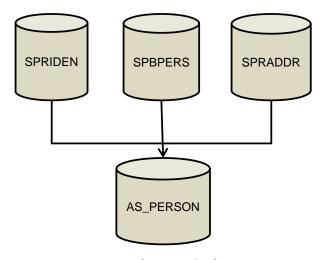
Banner Operational Data Store

The Banner ODS enables you to extract information from your source administrative systems and reorganize the information into a simplified set of tables in the Banner ODS database. End users can then create and deploy operational and ad hoc reports.

Banner ODS provides an extensive and flexible data store and business-organized reporting views with fewer columns and improved performance. You can use these views alone, or in combination with other views. Banner ODS also uses the supported third party reporting metadata layers to deliver an enterprise business area with many prejoined conditions to enhance operational and ad hoc reporting.

In the Banner ODS information from complex and normalized source tables are grouped into more simplified, denormalized tables that are grouped by concept. The following picture illustrates how data from Banner tables of person-related information are combined into one Banner ODS table named AS_PERSON.

Banner tables of personal information



Banner view of personal information

Figure 7: Banner to Banner ODS table consolidation

In Banner, to properly access the data, you need to understand the rules used to store the data in each table and the rules used to properly join the tables. Using the Banner ODS, you can access replicated Banner data in the ODS without the need to understand the complexities of the data structure because you can retrieve the data from the view.

Banner Enterprise Data Warehouse

The Banner EDW is a multi-dimensional database that gives you a complete picture of your institution's current and past business conditions. The Banner EDW offers comprehensive reporting and analysis capabilities by providing the following data objects:

- Operational/Aggregate stars that you can refresh with current data on a daily basis at both a summary and detail level
- Snapshot stars that offer a historical snapshots of the data at institution-specific points-in-time at a summary level

This combination of current and historical data allows you to do comparative reporting and analysis. Banner EDW includes prebuilt metadata integration with the IBM Cognos BI software to enable fast deployment of reports and analytics.

Performance Management applications

The Performance Management products are a subset of BPRA products that you can license and use in conjunction with the Banner ODS and/or Banner EDW to monitor and manage your institutions business objectives and analyze outcomes. The following picture illustrates the Performance Management products and high-level features.

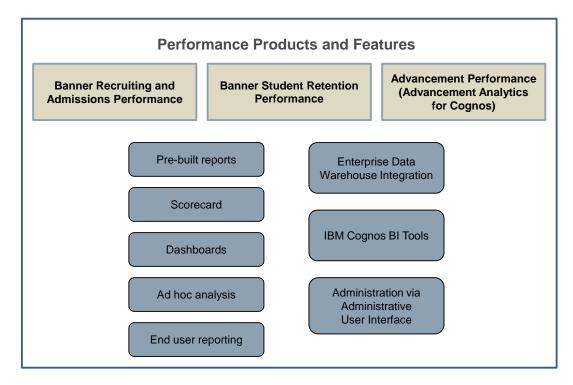


Figure 8: Performance Management products and features

Each Performance Management product includes the following types of objects built using the IBM Cognos Business Intelligence application:

- Business Concept Packages reporting metadata layer
- Cubes predefined reporting structures for quick analysis of summary measures by many attributes

- Reports display trends of outcomes, summaries of current outcomes, and detailed information about students, applicants, recruits, or constituents (depending on the product)
- Dashboards display several graphical performance charts for a specific business area on a single screen that you can review at a glance
- Scorecards display institutional goals and objectives including Key Performance Indicators (KPIs) that monitor progress toward your goals and objectives and a set of strategic initiatives that are needed to produce desired outcomes

The data for these objects is stored in the Banner EDW. These objects are intended to illustrate the kind of analysis you can perform on the warehouse data. You can use the reports, dashboards, and scorecards as delivered or you can modify them to reflect the specific information you need to analyze and monitor your institution's progress.

Advancement Performance

The Advancement Performance solution provides Advancement organizations (Banner Advancement and Advance users) with innovative ways to manage prospects and campaigns, drive fundraising, engage alumni and other constituents, and more. The Advancement Performance solution is comprised of the following products:

- Advancement Analytics for Cognos
- Enterprise Data Warehouse (Advancement data)

The Advancement Analytics for Cognos product provides the performance application content and tools and uses the Banner EDW multi-dimensional database that gives you a complete picture of your institution's current and past business conditions. This permits your institution to report both current and historical data for summary, trend and detail reporting and analysis

Banner Recruiting and Admissions Performance

Banner Recruiting and Admissions Performance is the reporting analytics and performance portion of the Banner Relationship Management Suite that lets you easily access recruitment, admissions, and selected financial aid information and use it to create reports.

Banner Recruiting and Admissions Performance uses the Banner EDW multi-dimensional database that gives you a complete picture of your institution's current and past business conditions. This permits your institution to report both current and historical data for summary, trend and detail reporting and analysis.

Banner Student Retention Performance

You can use Banner Student Retention Performance to monitor student retention, student success (performance and progress) and student engagement to satisfy institution goals and objectives; extend and modify performance monitoring capabilities; and create operational reports and ad hoc queries that meet the specific needs of your institution.

Banner Student Retention Performance uses the Banner EDW multi-dimensional database that gives you a complete picture of your institution's current and past business conditions. This permits your institution to report both current and historical data for summary, trend and detail reporting and analysis.

Data replication

The replication of data between the source and target databases is key to the usefulness of the warehouse solution and in turn the reports built off the target database. Data replication is referred to as the "staging" process, which simply means to copy tables in the source database into the operational staging area of the target database as illustrated by the following picture.

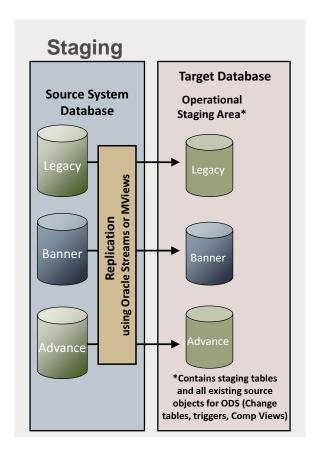


Figure 9: Data replication - staging data

You have two options for staging data in the target database. You can use Oracle Streams or Oracle Materialized Views as the framework for staging data. During the initial installation or upgrade process, your institution chose which staging approach to implement.

Refer to one of the following sections to learn more about managing the staging environment in the framework used by your institution.

- "Oracle Streams framework" on page 7-10
- "Oracle Materialized Views framework" on page 7-12

You can also refer to the *Oracle Streams Operations Supplement* or the *Materialized Views Operations Supplement* for additional information about setting up, configuring, and administering one of the frameworks.

Schemas and users

Each schema in the source system needs to have an identical schema in the target database to successfully synchronize data between the two. The following sections list the components owned by the various schemas for each of the BPRA products.

Banner ODS schemas

The following schemas exist in the Banner ODS.

Schema	Owns	
ODSSRC	All composite views	
	 Database packages that contain business logic used in the composite views and trigger logic. 	
	Note: These are all the ETL objects that used to live in the ODSMGR schema of Banner prior to ODS 8.2.	
ODSMGR	• All composite tables, and the reporting views that sit on top of the composite tables	
	 Database packages that contain business logic used in the reporting views 	
	 OWB mapping packages 	
IA_ADMIN	Metadata tables	
	 Any objects used or associated with the Administrative User Interface like the parameter table, the data display rules table, and the security tables. 	

Schema	Owns	
ODSSTG	Depending on the architecture framework you use, the ODSSTG schema owns one of the following:	
	Oracle Streams objects	
	Or	
	 Materialized Views objects (packages) 	
	This user is created in Banner and the ODS.	
ODSEUL	Discoverer End User Layer tables	
	Note: ODSEUL is the default name of this schema; however, you can rename the schema.	
ODSLOV	List Of Value views that are created from the MGT_VALIDATION table	
	These views are used as part of the Cognos, Discoverer and Self-	
	Service Reporting (SSR) tool metadata layers to build List of	
	Values that can be used for reporting.	
SSRMGR	All objects related to building the SSR application	

If you source the target database from a Banner source database, the following additional schemas may exist depending on which Banner products you license and stage in your target database.

- ALUMNI
- FAISMGR
- FIMSMGR
- FTAEMGR
- GENERAL
- PAYROLL
- POSNCTL
- SATURN
- TAISMGR

These schemas would house the staging tables (materialized views), change tables, and triggers.

ODSSTG password management

You must pay special attention when changing the password to the ODSSTG database user account on either the source or target database because the ODSSTG account in the Banner ODS has an Oracle DB Link back to the source account. If you change any user account passwords for schemas on the source database, for example, in Banner ODSSTG, SATURN, GENERAL, you must also update the DB link in the Banner ODS database to match the password for the related Banner account schema.

Refer to FAQ 1-AXRVD8, which describes the process and steps to alter passwords for any of the Banner ODS related database accounts.

Banner EDW schemas

The following schemas exist in the Banner EDW.

Schema	Owns	
EDWMGR	All fact, dimension, aggregate tables	
	 OWB mappings to load those tables 	
EDWSTG	EDW stage/input & clean tables	
	 OWB mappings to load those tables 	
	Table function packages to load input tables	

Banner RAP schemas

The RAP product includes the schemas listed for Banner EDW as well as the following additional schema.

Schema	Owns
RELATEMGR	• Staging tables that house the Relationship Management information
	• Triggers and change tables associated with the staging tables

Banner SRP schemas

The SRP product includes the schemas listed for Banner EDW as well as the following additional schema.

Schema	Owns
RELATEMGR	• Staging tables that house the Relationship Management information
	• Triggers and change tables associated with the staging tables

Oracle Streams framework



Refer to the *BPRA Oracle Streams Operations Supplement* for more information about maintaining the Oracle Streams framework.

The Oracle Streams framework uses Oracle Streams functionality to replicate data from the source to target database. Any insert, update, or delete actions performed on the source database tables are also performed on the tables in the staging area of the target database to synchronize the source and destination databases. The existing table triggers, change tables, and packages to create change records for the target database reside in that database.

The following picture shows the components used to replicate data between the source database and the target database.

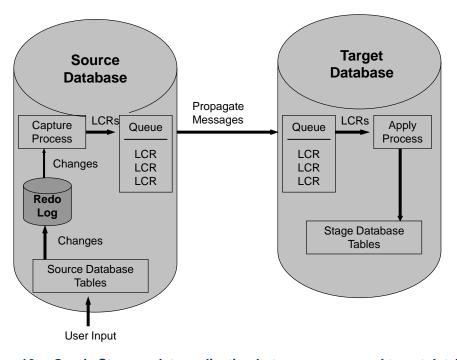


Figure 10: Oracle Streams data replication between source and target databases

The replication process uses the following Oracle Streams components.

Oracle Streams Component	What it does
Capture Process	The Streams capture process mines changes from the redo log on the Banner database whenever possible and from the archived logs if it falls behind the generated redo logs. Changes in the redo log that match specified rules are converted into messages called logical change records (LCRs), which are placed in a queue associated with the capture process.
Propagation Schedule	The Streams propagation schedule moves the messages from the source database queue to a queue on the Banner ODS. Each message remains in the source queue until the destination confirms that it has received it. This confirmation guarantees messages are never lost during the propagation stage.
Apply Process	The Streams apply process in the Banner ODS removes the messages from the queue and applies them directly to the destination tables in the Banner ODS. Any errors encountered while applying the messages are placed into an error queue. The messages in the error queue can be reprocessed once any issues have been resolved.

During the installation or upgrade process, the system creates all the components required to set up the Oracle Streams framework. This includes setting up the Streams queues, propagation schedule, capture and apply processes, and populating the staging tables in the warehouse with data from the source Banner tables.

Refer to the following Oracle documents for more information about maintaining and troubleshooting the Oracle Streams environment.

- "Oracle Streams Concepts and Administration Guide"
- "Oracle Streams Replication Administrator's Guide"
- "Streams Complete Reference FAQ" (MetaLink Document ID: 752871.1)

DDL Handler

A DDL handler is assigned to each Streams apply handler to replicate DDL statements from the source database to the staged tables in the target database. DDL statements run against a source table are replicated to warehouse unless a statement includes table dependencies. This means DDL statements executed on the source database that create, alter, or drop columns, non-foreign key constraints, and indexes are replicated to the target database; however, using the DDL handler allows the replication process to ignore the same types of statements for table triggers and foreign keys. These changes will not be replicated in the target database.

The user who executes a DDL statement on the source database must also exist in the target database for the change to be replicated successfully in the target.

When a DDL command is executed on the source database and the object schema is not specified, then the DDL command will only be applied successfully on the target database if the source user who executed the command also exists in the target database.



Marning

Be aware that source objects with system-generated names will have different names in the target database. This means that DDL statements involving these objects will not be replicated successfully, and will result in DBA_APPLY_ERROR records being created. The majority of the systemgenerated names in the source system that may be affected are NOT NULL constraints on table columns.

Oracle Materialized Views framework



Note

Refer to the BPRA Materialized Views Operations Supplement for more information about maintaining the Oracle Materialized Views framework.

The Materialized Views architecture uses Oracle materialized views (mviews) to initially stage data in the Banner ODS database and keep that data synchronized with the source database. In the Materialized Views architecture the staging tables in Banner ODS are actually materialized views that have the same names as the tables in the source database and get their data from the source database tables over a DB link. These materialized views are implemented as physical database tables that include triggers.

The Banner ODS upgrade process creates materialized views for all of the tables in your source database that are associated with Banner ODS. The upgrade process also creates an myiew log for each table in the source database that doesn't already have an myiew log associated with it. These mview logs track changes that are made to the source tables. The processes that refresh the Banner ODS database read the changes recorded in the mviews logs and update the materialized views (staging tables) in the Banner ODS staging area accordingly. This keeps the staging area synchronized with the source database.

The Operational Staging Area refers to those schemas in the Banner ODS/EDW database where the staging tables (replicated copies of the source tables) reside. In the mviews framework, the staging tables are implemented as read-only materialized views. This reduces the chance of a conflict between the source tables and the stage tables (materialized views) because the materialized views cannot be updated. The only way that a materialized view in the Banner ODS would be out of sync with its master table in the source system is if the source table has had a change that hasn't yet been applied to the Banner ODS via the refresh process.

There is an ODSSTG schema in the Banner ODS that houses the staging infrastructure and an ODSSRC schema that houses the ODS ETL components, for example, composite views. Refer to the "Multi-Entity Processing" section later in this document for information about schema relationships and how they relate between the source and target databases.

The following picture illustrates where materialized views fit into the Banner ODS architecture. For every source table that is used to create a materialized view, there is an associated materialized view log where changes are tracked for refresh purposes.

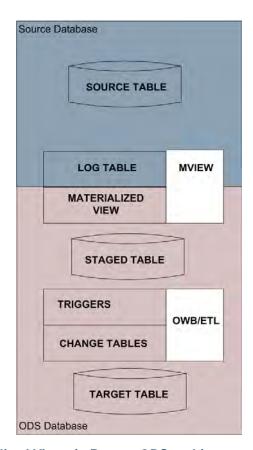


Figure 11: Materialized Views in Banner ODS architecture

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Database links

The Materialized Views framework uses database links (db links) to connect to the source system and create or refresh the materialized views in the Banner ODS. To support the use of Oracle Fine Grained Access Control (FGAC) in the source system the Oracle user associated with the DB Links (the ODSSTG user in the source system) must be defined as FGA policy exempt.

There are two options for creating the required database links between the Banner ODS and the source system: a single public database link or multiple private database links. The choice between public and private db links has potential database security implications. Your institution should consider both options, and then decide which one is the best choice for your institution and internal policy requirements.

Public database link

You can create the db link as a public database link. You create this link as the ODSSTG user in the BPRA instance and connect to the source database as ODSSTG. This option simplifies the administration of the Materialized Views environment since it requires only a single link. However, a public db link may pose a security concern because it is "public".

Private database link

You can create the db links as private database links. This requires creating a private db link for each of the source system schema owners. Each of these database links will be owned by the individual schema owners and will connect to the ODSSTG user in the source system. Using private db links provides somewhat tighter security because the links are private, but it also adds to the potential administrative overhead because of the number of links that you need to maintain. Additionally, if private db links are used there will also be a private db link owned by ODSSTG connecting to the ODSSTG user in the source system.

Each schema requires only one db link from Banner ODS to the source when you choose to use private database links. The following figure illustrates some of the schemas that would be in place for a Banner ODS environment with Banner as the source system.



This illustration does not include all schemas.

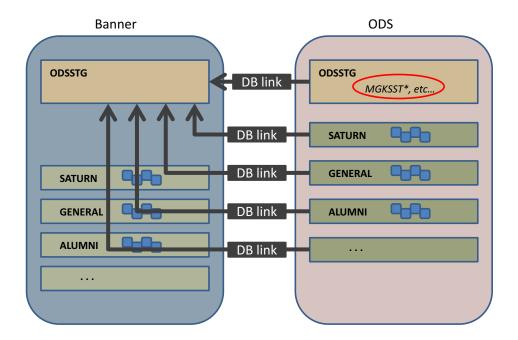


Figure 12: Source and Banner ODS schemas

Source to target data flow

The following picture illustrates the detailed data flow of information from the source to target database using Materialized Views. This example identifies a Banner table and its components related to the materialized view framework. An Advance source system would share a similar data flow replacing the Banner-specific tables and codes with comparable Advance tables and codes.

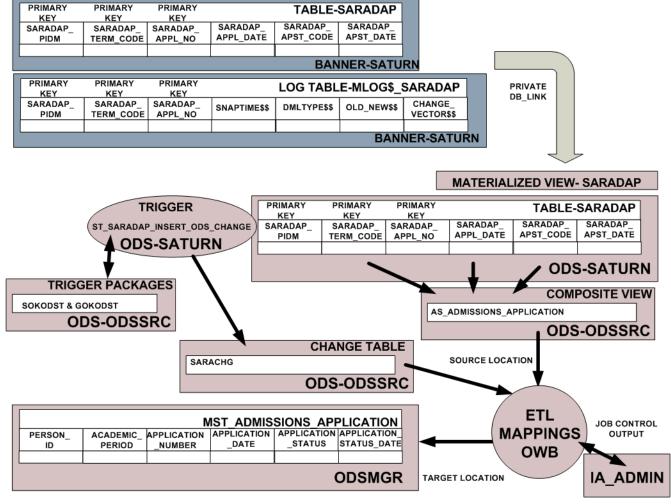


Figure 13: Materialized Views with Banner and ODS data flow

This example uses the Banner table SARADAP, which resides in the SATURN schema in the Banner database. The log table created for this Banner table is called MLOG\$_SARADAP and also resides in the SATURN schema in the Banner database. This log is used to track INSERT, UPDATE, and DELETE actions occurring in the SARADAP table to be used by the FAST refresh of the materialized view. In this case, the SARADAP table in Banner has a Primary Key on it which is used for the FAST refresh. The MLOG\$_SARADAP table will log records in it which contain the Primary Key columns. These columns will be used during the FAST refresh to compare data in the log to the data in the materialized view.

Records will continue to accumulate in the log tables until a materialized refresh is performed for SARADAP. The materialized view refresh process uses the DBLINK back to the Banner database to pull the records from the log and refresh the materialized view SARADAP in the ODS.

From this point forward, the ETL architecture will perform as it has previously using triggers and change tables to refresh the Banner ODS. The difference being that all of this logic has been taken out of the Banner database and now lives in the ODS database. The materialized view SARADAP will have an ODS trigger on it

(ST_SARADAP_INSERT_ODS_CHANGE) which then populates the change table SARACHG. This change table, in conjunction with the

AS_ADMISSIONS_APPLICATION Composite View, is used as part of the ODS refresh of the Composite Table MST_ADMISSIONS_APPLICATION.

Staging infrastructure

As part of setting up and maintaining the staging area of the warehouse, you will create, load, and stage materialized views in the target database. In addition, you may need to remove and restage materialized views.

The initial installation of or upgrade to the Materialized Views framework performs the initial creation of materialized views and the database links that are needed to support the delivered Banner ODS features. These materialized views are the staging tables located in the staging area of the target database.



Refer to the <u>"Maintain Materialized Views framework"</u> section in <u>Chapter 4, "Administrative User Interface"</u> for more information about staging and maintaining the Materialized Views architecture.

Materialized views staging objects

The system uses several objects (tables, packages, function, and procedures) to manage and let you monitor the Materialized Views framework. The following figure illustrates the staging objects used with the Materialized Views framework.

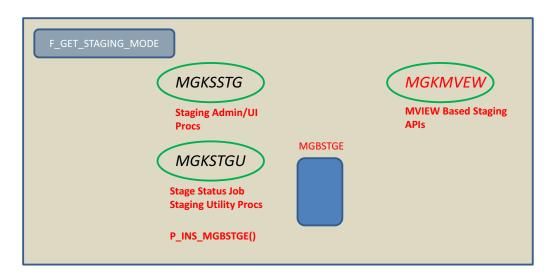


Figure 14: Staging packages for Materialized Views

The F_GET_STAGING_MODE function returns a value showing whether tables have been staged in the Banner ODS. The MGBSTGE table contains a record for each Banner table that is needed to support the delivered Banner ODS processes. The MGKMVEW contains the procedures that are used to stage tables as materialized views. The packages MGKSSTG and MGKSTGU provide the functionality to maintain and monitor the materialized views from the BPRA Administrative User Interface (UI).

The Administrative UI tool offers you a user GUI interface to perform tasks that maintain and update the Materialized Views framework. Using the Administrative UI, you can create additional materialized views or refresh the materialized views. The procedures P_STAGE_MVIEW and P_UNSTAGE_MVIEW located in the MGKMVEW package are the actual components used to carry out the staging (data refresh) tasks.

P_STAGE_MVIEW procedure

The system uses the P_STAGE_MVIEW procedure located in the MGKMVEW package to create, reload, or restage the materialized views that replicate source tables in the Banner ODS. All indexes on the source system master table are created on the materialized view in the Banner ODS. This procedure also creates the necessary synonyms in the ODS to support the ETL processes.

```
PROCEDURE P_STAGE_MVIEW(

SRC_ALIAS_IN VARCHAR2,

{OWNER VARCHAR2,
```

```
TABLE_IN VARCHAR2

| TABLES_IN ODSSTG.STAGING_TABTYPE,

OVERWRITE_IN VARCHAR2 DEFAULT NULL,

MVLOG_TABLESPACE_IN VARCHAR2 DEFAULT NULL,

MVIEW_TABLESPACE_IN VARCHAR2 DEFAULT NULL,

MVINDX_TABLESPACE_IN VARCHAR2 DEFAULT NULL,

DIRECTORY IN VARCHAR2 DEFAULT NULL);
```

P STAGE MVIEW procedure arguments

Following are descriptions of the arguments for the P_STAGE_MVIEW procedure.

SRC_ALIAS_IN

A logical name assigned to the database link owned by ODSSTG that points to the master site.

OWNER_IN, TABLE_IN | TABLES_IN

The owner and tables to be staged in the ODS as materialized views. OWNER_IN must be a single owner, while TABLE_IN supports wildcards in order to stage a single or multiple tables.

The procedure is overloaded to alternatively accept a TABLES_IN parameter. TABLES_IN is a collection of objects defined as fields of OWNER and TABLE_NAME, where both fields are of a VARCHAR2(30) data type.

OVERWRITE_IN

An optional string specifying what to do when a materialized view is already staged in the ODS. Valid values are:

- 'N' No overwrite. Do nothing if the materialized view already exists. (Default value)
- 'S' Synchronize (or reload) the materialized view. This option disables any table triggers on the materialized view, purges the materialized view from the materialized view log, performs a complete refresh of the staged data, and enables the table triggers.
- 'Y' Overwrite (or restage) the materialized view. This option saves all table triggers for the materialized view, safely drops the materialized view log, drops the materialized view, recreates the materialized view log, recreates the materialized view, and restores all table triggers on the materialized view.

MVLOG TABLESPACE IN

An optional string specifying in which tablespace at the master site the materialized view log should be created. If no value is specified, the log will be created in the default tablespace for the owner of the master table.

MVIEW TABLESPACE IN

An optional string specifying in which tablespace at the materialized view site the materialized view should be created. If no value is specified, the materialized view will be created in the default tablespace for the owner of the materialized view.

MVINDX TABLESPACE IN

An optional string specifying in which tablespace at the materialized view site the materialized view indexes should be created. If no value is specified, the indexes will be created in the default tablespace for the owner of the materialized view.

DIRECTORY IN

This procedure provides the ability to either create the materialized views for you, or generates scripts that can be run later. This is an optional parameter specifying where to generate the scripts. This must be a valid directory object name as can be viewed in the ALL DIRECTORIES database view.

Each call to the P_STAGE_MVIEW procedure also generates the following driver scripts needed to create and drop the materialized views:

- mylogs create.sql run at the master site to create the materialized view logs
- mviews create.sql run at the materialized view site to create the materialized views and synonyms
- mvlogs_drop.sql run at the master site to drop the materialized view logs
- mviews_drop.sql run at the materialized view site to drop the materialized views and synonyms

Example: Stage ALUMNI table

The following command stages the ALUMNI.AABDUES table in the ODS. The materialized view log will be created in the ALUMNI user's default tablespace at the master site. The materialized view and indexes will be created in the ALUMNI user's default tablespace at the materialized view site.

```
exec mgkmvew.p_stage_mview('BPRA_BANNER', 'ALUMNI', 'AABDUES');
```

Example: Restage tables

The following commands will restage both the SATURN.SPRADDR and GENERAL.GURMAIL tables. All materialized view logs will be created in the MVLOG

tablespace at the master site. All materialized views and indexes will be created in the MVIEW and INDX tablespaces at the materialized view site, respectively.

```
Declare
    Tab odsstg.staging_tabtype;
Begin

Tab(1) := 'SATURN.SPRADDR';
Tab(2) := 'GENERAL.GURMAIL';
Mgkmvew.p_stage_mview(
    Src_alias_in => 'BPRA_BANNER',
    Tables_in => TAB,
    Overwrite_in => 'Y',
    Mvlog_tablespace_in => 'MVLOG',
    Mview_tablespace_in => 'MVIEW',
    Mvindx_tablespace_in => 'INDX');
End;
//
```

Example: Generate materialized view scripts

The following commands will generate materialized view scripts for all Banner Finance materialized views. The scripts will be generated in the database server's directory associated with the DATA_PUMP_DIR directory object. The script will create all objects in their users' default tablespaces.

```
Begin
    mgkmvew.p_stage_mview(
    src_alias_in => 'BPRA_BANNER',
    owner_in => 'FIMSMGR',
    table_in => '%',
    directory_in => 'DATA_PUMP_DIR');
End;
//
```

P_UNSTAGE_MVIEW procedure

The P_UNSTAGE_MVIEW procedure located in the MGKMVEW package safely drops the materialized view log from the master site (source), and drops the materialized view and synonyms from the Banner ODS.

```
PROCEDURE P_UNSTAGE_MVIEW(

SRC_ALIAS_IN VARCHAR2,

{OWNER VARCHAR2,

TABLE_IN VARCHAR2

| TABLES_IN ODSSTG.STAGING_TABTYPE,

PRESERVE_MV_TABS_IN VARCHAR2 DEFAULT 'N');
```

P_UNSTAGE_MVIEW procedure arguments

Following are descriptions of the arguments for the P_UNSTAGE_MVIEW procedure.

SRC ALIAS IN

A logical name assigned to the database link owned by ODSSTG that points to the master site.

OWNER_IN, TABLE_IN | TABLES_IN

The owner and tables to be removed from the ODS. OWNER_IN must be a single owner, while TABLE_IN supports wildcards in order to remove a single or multiple tables.

The P_UNSTAGE_MVIEW procedure is overloaded to alternatively accept a TABLES_IN parameter. TABLES_IN is a collection of objects defined as fields of OWNER and TABLE_NAME, where both fields are of a VARCHAR2(30) data type.

PRESERVE MV TABS IN

An optional string when 'Y' specifies the materialized view should be dropped, but the underlying table structure and data should remain in the ODS. Once complete, this data can no longer be refreshed based on records in the materialized view log. When the value is 'N' then the underlying table and data will be dropped along with the materialized view. The default value is 'N'.

Example: Remove materialized views from staging area

The following example will remove all of the Accounts Receivable materialized views from the Banner ODS staging area.

```
exec mgkmvew.p_unstage_mview('BPRA_BANNER', 'TAISMGR', '%');
```

Example: Remove table and materialized views from staging area, keep sources

The following will remove the ALUMNI.AABDUES table and the POSNCTL.NHRDIST materialized views from the staging area, but the underlying tables and data will be retained.

makeMVs.sql script

The makeMVs.sql script is available in the ia_admin\dbscripts\utility_scripts directory. This is a sample script that shows how to mass-generate Materialized Views scripts for two schemas.

Refresh Materialized Views

The Materialized Views architecture uses Oracle's Fast Refresh process, which tracks only the changes since the last refresh. This incremental refresh functionality speeds the process of refreshing the materialized views in Banner ODS. If there is a primary key on the source table, the Fast Refresh uses that key to perform the refresh. When a change happens in the source, the change is put in the log and the key is logged. If a source table doesn't have a primary key, the materialized view is refreshed using RowID.

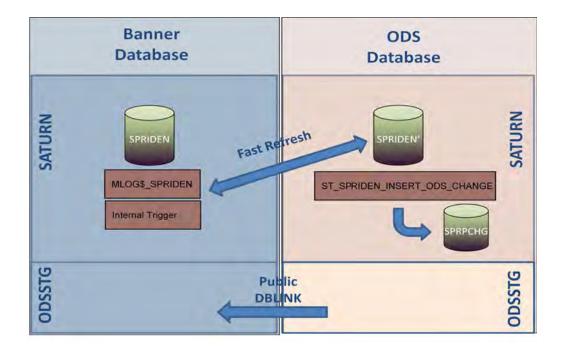
Because the materialized view architecture uses the Fast Refresh, a materialized view log is created for each table in the source system during the upgrade to the Materialized View architecture. The log specifies how to track changes. As part of the log creation, Oracle creates a trigger on the table. In the warehouse, when materialized views are created (with names same as in source database) the system gets all data and table structure from the source over the DB Link and includes the statement "refresh fast on demand with primary key".

Materialized view refresh processing has been added to the beginning of the ETL jobs available in the Administrative User Interface (UI).



Refer to <u>Chapter 4, "Administrative User Interface"</u> for details about using the Administrative UI to refresh the materialized views and maintaining the materialized views framework.

The following picture illustrates the objects used and actions performed during refresh of the SPRIDEN materialized views.



Changes to the SPRIDEN table in Banner fire the internal Oracle trigger on SPRIDEN and insert changes into the mview log (MLOG\$_SPRIDEN). Changes continue to accumulate in the mview log until a materialized view refresh is performed. After a materialized view refresh occurs, the records from the mview log are pushed over to the SPRIDEN materialized view in Banner ODS to synchronize it with the SPRIDEN table in Banner. As changes are pushed into the materialized view, the ODS trigger (ST_SPRIDEN_INSERT_ODS_CHANGE) on the SPRIDEN materialized view fires and inserts a record into the ODS Change Table (SPRPCHG). These records are used to refresh the normal ODS Composite Table.

Extract, Transform, and Load process (ETL)

The ETL process uses OWB, triggers, and change tables to load and refresh data from the staging tables to the composite tables in the target database. The following figure illustrates these components:

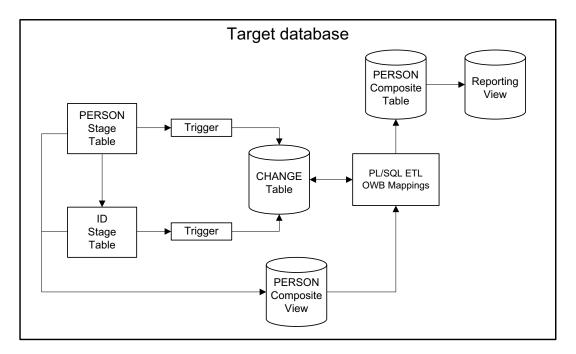


Figure 15: Target database components

The system uses the ETL processes to extract data from the staging tables and load it into the warehouse composite tables. All ETL activities are performed from within Oracle PL/SQL packages and deployed into a target database schema. The PL/SQL packages are created using Oracle Warehouse Builder (OWB). These packages are scheduled and run via the DBMS JOBS queue in Oracle.

All objects are created in the target database including all change tables, triggers, packages and composite views. All source tables needed to create the composite views are replicated in the target database with the same schema name as in the source. For example, the target database has a SATURN schema which contains replicated source (Banner) tables.



If you use Materialized Views to replicate data, you can schedule the Materialized Views refresh jobs to keep the source database tables and the target staging tables synchronized.

You can submit and monitor the ETL jobs using the Administrative User Interface. Typically referred to as 'mappings', the packages, when executed, delete, update and load data from the staging to the composite tables based on the type of mappings executed.

During the initial load of the target database, data is extracted from the source database using Oracle views that include specific business logic (for example, Enrolled or In State Resident indicators). The extracted data is then migrated into denormalized composite tables within the target database. These composite tables represent a conceptual organizational structure (for example, Student, an Employee, or a Receivable Customer). To provide for data value security, the Administrative UI allows you to create Oracle Fine Grained Access rules and apply them to the composite tables to prevent information from being viewed without authorization.

The final layer of data access is the reporting views. These views allow calculated columns and increased flexibility in managing what data the end users can access. In select instances, such as the slotted concepts, data display rules are applied to user and institution profiles which filter out unwanted data.

To ensure that the data is current, you can incrementally refresh the target database on a scheduled basis. OWB packages combine the business logic views with the change tables located in the product schemas to determine what updates are applied to the target database composite tables.

You can manage all data loads and updates, fine grained access rules, meta data management, data display rules, and freeze data processing using the Administrative UI.

ETL components

The following section describe the various components used to accomplish the ETL process.

Stage tables

Information from the source database tables is replicated in the target database stage tables.

Database triggers

A single database trigger exists on each stage table, except for the validation tables. Triggers exist for all tables used in a view, including function tables. The triggers are created in the schema owner of the associated stage table.

Each trigger identifies Data Manipulation Language (DML) activity on the table. When a change is made to a source table, that change is replicated in the associated target database table. The change in the staging table causes the trigger on that table to fire. The trigger calls a stored PL/SQL procedure which inserts records into the appropriate change tables

to reflect the change in the replicated table. The triggers flag changes on Banner replicated tables and create records in the appropriate change tables.

Triggers are created on the actual source replicated tables that provide source data for the target database. The triggers are not delivered with the baseline Banner applications.

Trigger packages

Trigger packages manage the trigger procedures. There is one procedure for each change table with each procedure managing a unique index on the change table. There is one package per product area within the target database, such as Student, Human Resources, Finance, Financial Aid, Advancement. ODSSRC owns the trigger packages.

As data is entered into the source database, it is typically processed one row at a time. For each field entered, the data is verified for field syntax, such as date or numeric format. Fields requiring additional verification are verified against rule tables. After the values are properly checked, the data is committed to the database table that will house the information. During the commit action, any Oracle triggers on the database table being updated are initiated and additional, but separate, logic is executed based on the parameters of the trigger (such as Before Insert and After Insert).

Triggers are built and enabled on all source database replicated tables that house information that is used in the target database. Therefore, when a target database trigger is fired, the trigger inserts the keys of the data being changed into the change tables along with a DML indicator. The existence of these rows in the change tables tells target database that the source has data waiting to be retrieved.



The change tables only maintain the most recent database activity for a row of information for a specific key. When multiple actions occur against the same source database table and row, only the last action is represented in the change table. This allows the replication process to work faster, and decreases the amount of data captured in the change tables.

Change tables

Change tables maintain data about what tables and records have been changed, inserted, or deleted in the stage tables and the source database tables. There is not a one-to-one relationship between change tables and stage tables or between changes tables and composite tables. One change table exists for each logical group of information.

Change tables work like collector tables. They include four basic fields:

- Keys
- · Table name
- Process ID

• Most recent DML.

Change tables reflect DML activity for specific target database stage tables, but are also used when multiple tables use the same key.

Example:

The SPRPCHG table stores DML activities for the Hold and the Person composite views.

Change tables are owned by their respective product schemas in the target database, and are identified using standard source table naming conventions. The column names start with the seven-character prefix of the table name. All columns in each of the change tables are identical with the exception of the key columns. Here, the key columns represent the product/database tables they are accessing, and also represent the keys that the target database uses when records change. All change tables are suffixed by 'CHG'.

The columns that compose the change table are the key columns relative to the composite view(s) it supports, along with the TABLE_NAME and the PROCESS_ID columns. The last two columns allow inserts into the table with a null PROCESS_ID by updates to Banner that take place during Incremental Refresh. Since the target database processes and deletes all rows in the change tables with a NOT NULL PROCESS_ID, the null value allows the row to stay until the next update. This ensures that it is not bypassed or inadvertently deleted.

Typically, a second index is created in the format of TABLE_NAME, PROCESS_ID, and RECORD ACTION columns.

Example:

SPRPCHG - Change table for PIDM related Banner replicated tables

Column Name	Data Type	Column Comment
SPRPCHG_TABLE_ NAME	VARCHAR2(30)	Used to identify which composite view (and/or target database table) is being populated by this specific row of data.
SPRPCHG_PIDM	NUMBER	The change table needs to hold as many keys as required to manage DELETE and UPDATE information in the target database. Keys do not need to identify a unique row, but must maintain some fields for comparison.
SPRPCHG_RECORD_ ACTION	VARCHAR2(1)	Stores the last DML action for the key combination $(I, U, \text{ or } D)$.

Column Name	Data Type	Column Comment
SPRPCHG_PROCESS_ ID	VARCHAR2(30)	Updated by the procedure UPDATE_CHANGE_TABLE which inserts non-null values to flag which rows are being processed during the incremental refresh process. This allows inserts to take place into the change table while replication is also taking place.
SPRPCHG_ACTIVITY_ DATE	DATE	Reflects the actual date of insertion or update of the rows.

Change table triggers

The target database maintains triggers on all source replicated tables used to incrementally refresh data into the target. Although the triggers are enabled on the actual source replicated tables, they are referred to as 'change table triggers' because they populate the target database change tables with DML information. The trigger inserts rows of information in one or more change tables by invoking a procedure that packages all trigger insert actions for the target database change tables.

The triggers use basic logic except that the Exception routines allow for continued processing when encountering a DUP_VAL_ON_INDEX condition. This condition occurs when a row of data exists within the change table for the table's unique index. When encountered, the procedure updates rather than inserts the information in the change table by overlaying the DML activity and the activity date. This action causes only the most recent DML activity to be stored in the change table.

All triggers are owned and maintained within the product schema of the table to which the triggers are added. For example, SATURN would own Student Triggers.

Change table Triggers comprise of the following procedures:

- Each Banner product has a procedure that manages all change table triggers for that product area. For example, GOKODST for General and SOKODST for SATURN.
- The triggers are owned by the ODSSRC schema.
- The names for each procedure follow Banner standard naming conventions.

Composite views and functions or packages

Composite views exist in the target database under the ODSSRC schema. During the ETL process, when you perform a refresh of target data, the composite views are joined with the appropriate change tables and updated with the changed information.

In some cases, functions are used to calculate new data that is created from source data and loaded into the target database. Packages are used to group related procedures, functions, and cursors together. There is one package for each target database module of information; for example, Student, Finance, and Advancement. These packages are installed into the ODSSRC schema.

Composite views represent a composite (mixture) of the tables selected from Banner and allow for a single piece of data to be extracted row-by-row, with all the business logic included in the view itself. The column names are generic so that they can be used by all Ellucian product lines. Therefore, names familiar to Banner clients can appear to be more generic than the familiar Banner terminology. For example, Term becomes Academic Period, PIDM becomes UID (unique ID). The views are used for reporting in Banner. But, they are designed to become the Incremental Refresh data extraction view.

Views are created and maintained in the ODSSRC schema within the target database. Since these views are accessing data directly in the various source replicated tables, explicit SELECT grants are assigned to the schema when tables are staged in the target. Refer to the section "Multi-Entity Processing" on page 7-54 to see a list of schemas and what they own.

OWB mappings

Oracle Warehouse Builder (OWB) mappings, which are PL/SQL scripts, define the relationship of data between the composite views and composite tables. The Extract, Transform, and Load processes (ETL) built using OWB are the mappings that populate Banner ODS.

The OWB mappings are run during the initial load of Banner ODS and when you incrementally refresh Banner ODS. When run, the scripts load, update, or delete data in Banner ODS composite tables. Three scripts — Load, Update, and Delete — exist for each Banner ODS composite table. The different types of mappings perform the following functions:

- LOAD mappings: initially load Banner ODS composite tables by selecting all rows of data from the source system via the composite view.
- DELETE mappings: delete rows of data in Banner ODS when the change table reflects activity of any type for the key. This mapping uses the key in the change table since no data will be found in the composite view for deletes. This process also updates the PROCESS_ID value in the corresponding change table for all rows before any delete takes place.
- UPDATE mappings: insert records into Banner ODS based on keys in the composite view joined against rows in the corresponding change table.



It is mandatory that you run the DELETE mapping before the related UPDATE mapping, otherwise no records will process in the UPDATE mapping.

The OWB user interface contains graphical editors that enable you to design a complete logical model of your warehouse. The OWB helps you plan how to extract data from a variety of sources, transform the data, and configure the data for loading into Banner ODS. The OWB code generator lets you deploy and populate the Banner ODS without manual coding, and integrates with the Oracle database and query tools.

Composite and slotted tables

Composite tables are the tables within Banner ODS that are loaded with data from the source system. Slotted tables store data values for a specific code related to a base table.

Composite tables

The composite tables are populated during the initial install process, and are also updated during the incremental refresh process. The composite tables are used for the following purposes:

- Denormalized tables are used to store "conceptual" structures of data.
- Normalized tables are used for quick data filtering or for unlimited repeating values.
- The MGRSDAX rule table is used to load the composite tables.

Slotted tables

The slotted tables have the following attributes:

- Used to denormalize Repeating Concepts (normalized tables.)
- Populated via rules from MGRSDAX.

Some GTVSDAX rules, but not values, are duplicated when MGRSDAX is initially populated. Use the Administrative UI to add or modify MGRSDAX rules' values to meet your institution's needs.

Understanding composite tables and slotted tables

Banner ODS includes composite tables and slotted tables. Composite tables include the main data that is extracted from your source system and stored in Banner ODS. Slotted tables store data values for a specific code related to a base table.

Example

The TEST_SCORES_SLOTTED table in Banner ODS stores all valid Test Score values that were loaded from your source system to Banner ODS. When a report is created against Banner ODS, the system pulls data from the composite tables. The system checks codes stored on the slotted tables, as needed, and pulls the appropriate code values. If you choose to use Business Profiles, the system pulls the appropriate values

for the profile with which the user is associated. The default business profile of INSTITUTION is used when specific display rules are not established.

Using slotted tables optimizes the speed queries since the system only has to check for specific code values as needed.

Updating slotted tables

It is important to keep data in the slotted tables synchronized with data in the composite tables. Whenever composite tables are updated, related slotted tables should also be updated.

Both composite and slotted tables are updated when refresh jobs are run to update Banner ODS data on a regular basis.

Reporting views

Data from each Banner ODS composite table is presented in one or more reporting views. Banner ODS reporting views are the views that your users use to create reports within Banner ODS. Users point their report writing tool at these views and build reports.

Run ETL load processes

You run load processes using the Administrative User Interface (UI) from the **Options>Schedule a Process>Select a Subprocess>Schedule Banner ODS Mappings** menu option. When you run a process, one or more LOAD mappings extract all the data from a composite view in the source system and move it into the corresponding target database composite table.

You can run a Load process periodically for one or more composite tables, for example, as an alternative to the Refresh process. To facilitate the use of a load at any time, the Load processes also purge the appropriate change tables that correspond to the composite tables being loaded.

You can disable the purge feature on Load mappings. To disable the change table purge for a Load mapping, you need to create records in the MTVPARM table. Refer to the <u>"ETL MAP PACKAGE LOAD PURGE Parameter"</u> section of the <u>"Administrative User Interface"</u> chapter for information about using this parameter to disable a change table purge for a Load mapping.

Run ETL Load or Refresh jobs in parallel

You can schedule the ETL Load and Refresh jobs to run in parallel to reduce the time it takes to load or refresh the entire database.

Run ETL Refresh jobs in parallel in Materialized Views framework

If the ETL Refresh jobs run at the same time, it's possible that materialized views shared by multiple areas of the warehouse may not get refreshed appropriately before the actual ETL Refresh job runs. To avoid this issue, you should refresh any related materialized views before you run the ETL Refresh jobs in parallel.

Example

Suppose that your institution runs the ETL refresh jobs Refresh General, Refresh Student, and Refresh Accounts Receivable at the same time each night. The source Banner SPRIDEN table is used for refreshing both the Student and General subject areas. This means it's possible that the ETL Refresh jobs could load the warehouse before all of the related materialized views have been refreshed. To ensure that all related materialized views are refreshed in the staging area before the ETL Refresh jobs actually load the target database, in this case you should schedule the following mviews refresh jobs to run before the ETL Refresh jobs:

- AR Refresh Group and AR Validation Refresh Group
- General Refresh Group and General Validation Refresh Group
- Student Refresh Group and Student Validation Refresh Group

Incremental refresh process

The term incremental refresh identifies how data synchronization occurs between source and target tables to ensure that accurate information is stored in the target database. Data that has changed in the source is captured and, using the ETL tool, is applied to the target database. During the process, the change tables bring over only the data that has changed, and then, using an ETL mapping, the change tables are deleted. This is followed by an update ETL mapping that inserts the new data. The incremental refresh process uses records in change tables to identify the records which need to be refreshed, and uses different mappings for load vs. refresh processes.

Typically, you will run a complete load, then run the refresh processes on a nightly basis to keep the target data synchronized with the source data. You should also run a incremental refresh process if data in Banner ODS has changed since the last time you ran the refresh.

Banner ODS to Banner EDW data flow

Banner EDW stores data that is fed from the Banner ODS. The data is stored on both primary storage and alternative storage. The data is cleansed and restructured to support queries, summaries, and analyses. The following picture illustrated the flow of data from Banner ODS to Banner EDW.

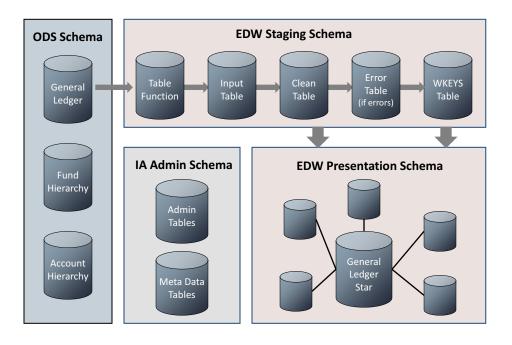


Figure 16: Banner ODS to Banner EDW data flow

Banner ODS is a relational data model that you can continuously and incrementally refreshed using the Banner Administrative UI. Banner EDW reorganizes, groups, and summarizes the information from the Banner ODS star schemas. This information can contain operational data or an event at a specific point-in-time. The Administrative UI schedules Banner EDW load mappings to take place at scheduled times. Banner EDW also includes operational star data models that you can refresh on a regular basis like the Banner ODS.

Banner EDW resides on the same machine and database as the Banner ODS, but resides under the schema owner name of EDWMGR. Banner EDW also uses the EDWSTG schema as a repository for staging tables used to process extracts. The Banner ODS is contained within the ODSMGR schema.

Banner ODS is a database of denormalized tables called composite tables. These composite tables store data contents from the administrative systems and are constructed specifically for reporting. Denormalizing combines data from many smaller tables into fewer, larger tables. This enhances data extraction and query access by eliminating the need to perform intensive performance table joins.

Data is retrieved from the source system(s) using composite views. These views use the existing business logic on the source system, and provide the extraction logic for the composite tables that reside on the reporting server. Banner ODS typically resides on a separate server to take advantage of the performance benefits associated with a query-only system. Business logic is not resident on the reporting server, ensuring that the Banner

ODS model can support all products. Because the Banner ODS is a query-only system, the data in the Banner ODS flows only one way — from the source administrative system to the Banner ODS, never from Banner ODS to the administrative system.

Banner ODS standard composite tables were created with your industry-wide business needs in mind. This enables you to create your own reporting views and reports based on the delivered tables.

Banner ODS also includes Reporting (presentation) views. Reporting views are the final views you use to create reports.

Banner EDW and its associated event-based processing is designed to capture point-intime information for trend analysis and historical reporting. Banner EDW also includes operational and aggregate star data models that you can refresh on a daily basis in concert with the Banner ODS. These data models provide the ability to daily assess key institution measures and to drill down from these institution measures to the underlying details.

Banner EDW is designed to work with the Banner ODS as a source within the same environment. All data extraction, transformation, and load (ETL) activities are performed by Oracle PL/SQL packages generated by Oracle Warehouse Builder (OWB) and deployed into stage and production warehouse schemas. As with the Banner ODS, these packages are scheduled and run via the DBMS_JOBS queue in Oracle. You can submit and monitor the jobs within the Administrative UI.

Banner EDW source and target database instances reside in the same database, but are in different schemas. As Banner EDW loads, data is extracted from the Banner ODS using pipelined table functions. The extracted data is loaded into a staging area where data is cleansed based upon the institutional preferences.

The unique dimensional attribute combinations are then inserted into the dimension tables with a uniquely defined surrogate key. The facts of the extracted data are then loaded into the fact table(s) along with the surrogate keys defining each record's unique combination of dimensional attributes.

To provide for data value security, the Administrative UI enables Oracle's fine grained access rules to be created and applied to the dimension tables and fact tables.

Oracle Warehouse Builder (OWB) to perform ETL

The Oracle Warehouse Builder (OWB) user interface contains graphical editors that enable you to design a complete logical model of your warehouse. The OWB helps you plan how to extract data from the Banner ODS, and transform and configure the data to load into Banner EDW. The OWB code generator lets you deploy and populate Banner EDW without manual coding, and integrates with the Oracle database and query tools.

Administrative User Interface (UI)

The Administrative User Interface is a Web-based interface that uses the Banner Web Tailor. This Administrative UI is used for the following administrative functions:

- Preferences and Security Use to manage security, set global preferences, and set up user accounts.
- Options Use to control the processes to extract, cleanse, and load data into the system, schedule a process (execute and monitor ETL processes).
- View control reports, view and remove scheduled processes, and maintain freeze data.
- Meta Data Use to view and manage the meta data supporting the systems.
- New Banner Web Tailor Administration Use to customize a Web menu, procedure, graphic element, set of information text, or set of menu items. You can also update user roles, customize a Web module, Web rules, or Banner Web Tailor parameters; customize a login return location; and customize Banner Web Tailor overrides or global user interface settings.
- Cleansing Use to maintain descriptions to be stored in Banner EDW, and to translate codes from the Banner ODS to Banner EDW.

EDW data loads and Incremental Refresh process

The term "incremental refresh" identifies how data synchronization occurs between the source and target set of tables to ensure that accurate information is stored in Banner EDW. Information that has changed in the Banner ODS is captured and, through the use of ETL tool sets, is applied to the target system, Banner EDW. During the process, the change tables bring over only the data that has changed, and then the change tables are purged.

The Banner EDW incremental refresh is similar to the Banner ODS incremental refresh in that it uses records in change tables to identify the records which need to be refreshed. However, unlike the Banner ODS which uses different mappings for load vs. refresh processing, the Banner EDW refresh uses the same mappings/process as the Banner EDW load but uses the corresponding change table to identify and process only the records which should be refreshed.

Once the Incremental Refresh process in the Banner ODS is processed, and before the Banner ODS change table records are purged, change records are inserted into Banner EDW change tables using the MAINTAIN_EDW_CHANGE_RECORDS procedure. There is a one-to-one correspondence between each fact table and its associated change table.

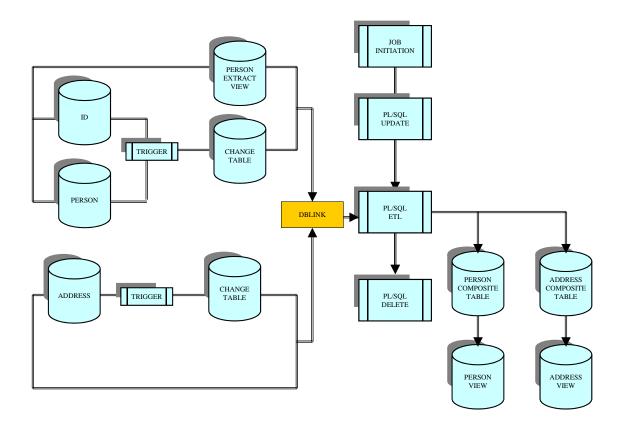
In addition to processing the records in the change tables, the Banner EDW Incremental Refresh process incorporates records in a fact table's corresponding stage ERROR table, which would contain any records that previously had cleansing "errors". During the

refresh, the ERROR table records' key values are entered into the corresponding change table and processed along with the change table records. Once combined with the change table records, the error table records are purged. However, any records with new cleansing errors are entered into the ERROR table during the refresh. They remain in this table till the next Incremental Refresh or Load process is run for that fact table or star.

This approach is easy to maintain and has negligible impact upon the production environment.

Typically, a complete load is run once, and then the Incremental Refresh processes for both the Banner ODS and the Banner EDW are run on a nightly basis to keep the data in sync. An incremental refresh should be run if data in the Banner ODS has changed since the last time a refresh was run.

The following image outlines the incremental refresh flow:



- 1. Submit the refresh job from the Administrative UI (Schedule a Process).
- **2.** Select the Refresh process parameter.
- 3. During the ODSMGR refresh, before the Banner-side Banner ODS change tables are purged, insert records into EDWSTG change tables via the MAINTAIN_EDW_CHANGE_RECORDS procedure.

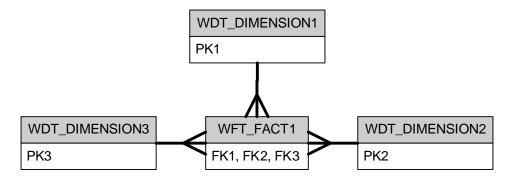
- 4. Insert the corresponding fact table's ERROR records' key values into the change table.
- **5.** Use the Refresh process parameter in conjunction with the change table records.
- **6.** Select the records to be processed.
- **7.** Run the PL/SQL UPDATE process to delete records from the fact table to be refreshed.
- **8.** Cleanse the refresh records.
- **9.** Enter any records with cleansing records into the Error table.
- 10. Update/insert dimension records.
- 11. Insert refreshed records into the fact table.
- **12.** Repeat for all jobs submitted until complete.
- **13.** Verify the log file for a successful load and completion of all jobs.

Load process vs. Incremental Refresh process

Occasionally, a lot of data changes in the source system and, therefore, in the Banner ODS. For example, via a data import and grade rolls at the end of an academic period. These changes generate a lot of data in the Change tables. This can slow down the Incremental Refresh process. In these cases, it is more efficient to run the Load process instead of the Incremental Refresh process (for those affected tables). Determining when it is more efficient to run a load versus a refresh is somewhat subjective, and can differ between the Banner ODS composite views and the Banner EDW stars.

Banner EDW Star schemas

Star schemas are a standard dimensional data modeling technique used to design data warehouse reporting structures. Each star schema contains a centralized fact table and its associated dimension tables, which are typically referenced through foreign keys. The fact table stores measures while the dimension tables store attributes that users can use to sort, filter, and group the measures. These structures are referred to as "star schemas" because of their star-like appearance when viewing their entity relationship diagrams (ERDs). The following picture illustrates a simple fact and dimension table relationship including foreign key relationships.



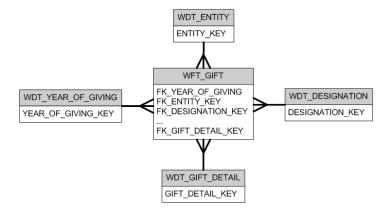
The Banner Enterprise Data Warehouse (Banner EDW) product provides the following types of star schema data models:

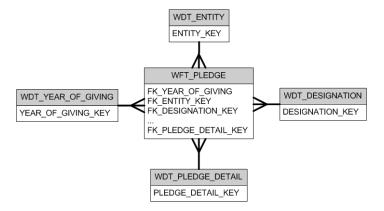
- "Operational stars"
- "Aggregate stars"
- "Snapshot stars"

Operational stars

Operational Star schemas support analysis of a particular subject (for example, gifts, pledges, and so on) by multiple dimensions such as year of giving, designation, and so on. Many of these dimensions are used (or conformed) across multiple operational stars. The operational stars are intended to be refreshed on a daily basis. Currently these operational stars are provided for recruiting and admissions, financial aid for new enrollments, student, and advancement subject areas. The fact tables for operational stars use the WFT prefix.

The following figure illustrates two operational star examples for advancement, gift, and pledge. Some of the dimensions are shown for each fact, including multiple shared dimensions.



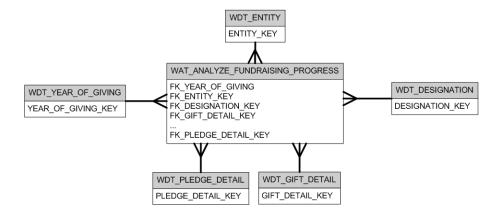


Several operational stars provide the option to create a snapshot star. The snapshot star provides the same data as the operational star, however, the data is saved for a specific point in time by adding the event dimension to the operational data.

Aggregate stars

Aggregate star schemas consolidate information from multiple operational stars to support faster performance analysis of a business concept such as Manage Prospect Pipeline or Analyze Fundraising Progress. The aggregate stars are intended to be refreshed on a daily basis. The Cognos packages for each business concept primarily use these aggregate stars as a data source to optimize performance. The fact tables for aggregate stars use the WAT prefix. Currently these aggregate stars are provided for recruiting and admissions, financial aid for new enrollments, student, and advancement subject areas.

The following figure illustrates an example of the Analyze Fundraising Progress aggregate star for Advancement. This aggregate star consolidates data from multiple operational stars (including gifts and pledges) into the WAT_ANALYZE_FUNDRAISING _PROGRESS fact table with foreign key relationships to several dimension tables.



Snapshot stars

Snapshot Star schemas capture data at institution-specified points in time for a business concept. Most of the aggregate business concepts provide the option to create a snapshot star. The snapshot star provides the same data as an aggregate star, however the data is saved for a specific point in time by adding the event dimension to the data. This event dimension time period could represent, for example, end of month processing for financial data, start or end of academic period for enrollment data, and so on. This allows your institution to historically build data that you can compare over time for longitudinal reporting flexibility. You can use the common event attribute to compare disparate time periods to one another.

There are two variations of snapshot star schemas in the Banner EDW. The first supports a single business need with a set of data combined into a single snapshot star schema sourced directly from the Banner Operational Data Store. For these, the snapshot includes a fact and dimension tables with all of the data to be used as dimension attributes with their associated specified measures. Cognos packages and cubes are delivered with the Banner EDW that use these snapshot stars as a data source.

For most of the business concepts supported by the operational and aggregate stars, a different snapshot process is used. For these, a set of operational and aggregate star schemas is saved at the same point in time with the same event dimension or attributes. Snapshot Cognos packages and cubes are delivered with the Banner EDW which contain the same attributes as the business concept packages and cubes along with an event dimension.

Warehouse tables

The warehouse includes the fact and dimension tables that are used to build the star schema data models.

Fact tables

The fact table is the primary table in a star schema that stores the numerical or event based performance measurements of the institution. Fact tables store dates, amounts or counts of information. Fact table names begin with WFT_. Total Credits, stored in the WFT_ENROLLMENT fact table, and Prospect Target Amount, stored in the WFT_PROSPECT fact table, are examples of measures.

Dimension tables

Dimension tables contain the descriptive attributes that define how you want to slice or look at the measures in a fact table. Dimension table names begin with WDT_. Gender and Citizenship_Ind are examples of dimension attributes on the WDT_DEMOGRAPHIC dimension table.

View fact and dimension tables

Meta Data is provided for the fact and dimension tables associated with each star. You can use either the published Meta Data reports or the Administrative User Interface (UI) related Meta Data pages to view meta data. To view fact and dimension table information displayed on Banner EDW Meta Data Reports, perform the following steps.

- 1. Log into the Administrative User Interface.
- 2. Select the **Meta Data** menu.
- **3.** Select Banner Enterprise Data Warehouse.
- **4.** Select the star you want to review. The Star Report for that star opens.
- **5.** Select the target dimension or fact table you want to review. The selected report displays.



Refer to the "Administrative User Interface" chapter of the *Banner EDW Administration Guide* to learn more about the meta data.

Banner EDW load process for snapshot stars

Use the following steps to move data from the Banner ODS to Banner EDW snapshot stars:

- 1. Extract data from the Banner ODS based upon parameters passed from the Administrative UI. This data is loaded into the INPUT table associated with the business area being loaded.
- 2. Load information within the INPUT table to the associated CLEAN table and run the cleansing process. The cleansing process uses values defined by the institution within the Administrative UI to manage descriptions, translate codes, and update them in the CLEAN table.
- 3. Use data from the CLEAN table to discern the unique combinations of dimensional attributes within the data extracted. New combinations of attributes are inserted into their associated dimension tables and assigned a surrogate key. The first dimension analyzed is the time dimension. If the combination of dimensional attributes within the time dimension already exists, the loading process halts unless the Replace Indicator check box is checked. This ensures that historical data is not overridden unless explicitly requested by an institution.
- **4.** After loading the attributes into the dimension tables, join the CLEAN table with its various associated dimension tables to obtain the surrogate keys associated with each record. This data is loaded into the associated WKEYS table.

- **5.** Run the FACT_DELETE mapping to delete records in the fact table for the defined time slice when the Replace Indicator check box is checked.
- **6.** Load data from the WKEYS table into the fact table.

Banner EDW load process for operational stars

Use the following steps to move data from the Banner ODS to Banner EDW operational stars:

- 1. Extract data from the Banner ODS based upon parameters passed from the Administrative UI. This data is loaded into the INPUT table associated with the business area being loaded.
- 2. Load information within the INPUT table to the associated CLEAN table and run the cleansing process. The cleansing process uses values defined by the institution within the Administrative UI to manage descriptions, translate codes, and update them in the CLEAN table.
- 3. Use data from the CLEAN to discern the unique combinations of dimensional attributes within the data extracted. New combinations of attributes are inserted into their associated dimension tables and assigned a surrogate key.
- **4.** After loading the attributes into the dimension tables, join the CLEAN table with its various associated dimension tables to obtain the surrogate keys associated with each record. This data is loaded into the associated WKEYS table.
- 5. Load data from the WKEYS table into the fact table.

Banner EDW Stars Reference Guide

The Banner EDW Stars Reference guide includes summary information about each of the stars in the warehouse with hypertext links to each of the star diagrams. The guide is delivered as zip file that is a compilation of the following PDF files:

• Banner Student Retention Performance Stars Reference guide

• Star diagram PDF files

The Banner EDW Stars Reference guide is delivered in the documentation zip file with your product release. You can also download the zip file from the Customer Support Center using the following steps:

- 1. Log in to the Customer Support Center.
- 2. Select Documentation & Download Center.

- 3. Select Product Cross Product-Enterprise Data Warehouse and click **List Available Documentation**.
- 4. Under Release 8.x, choose 8.x Data Model Guides and click List Files.
- **5.** Choose which version of the Banner EDW Stars Reference guide that you want to download and click **Prepare Files for Download**.
- 6. Select Click Here to Download Zip File to confirm the download.

Cubes

Cubes are basically precalculated reports with data that you can rearrange and reformat. They provide the ability to manipulate predefined facts (measures) and dimensions (attributes) in various formats to provide different perspectives on an institution's business. Refer to the "Cubes" chapter of your Administration Guide for detailed star schema and cube information.

Using Cognos cubes as the user interface, you can browse data contained within the subset of the star schema in Banner EDW. This interface provides a predefined descriptive view of the information that enables you to understand data without requiring any detailed understanding of a database query language. The presorted data loaded into the cube can be retrieved quickly and can permit multiple dimensions and measures to be selected and reviewed as desired.

Cognos Transformer provides the Cognos ETL equivalent of OWB for the loading of the Cognos cubes. Transformer provides the ability to define relationships within your data warehouse and pre-aggregate the measures presented to end users within the cubes.

Cleansing

Data cleansing is the process of verifying the Banner ODS code values and if possible, translating them to standardized code values in Banner EDW. The ETL mappings initially load code values and descriptions from the Banner ODS into Banner EDW cleansing tables. Using the Administrative UI, the data warehouse administrator can set up cleansing rules specific for your institution.

You can use cleansing to accomplish the following activities:

- Translate a code value in the Banner ODS to a new value in the Banner EDW.
- Change a Banner ODS description value to a new value in the Banner EDW.
- Group a range of Banner ODS code values into one Banner EDW value.
- Translate multiple Banner ODS values into one Banner EDW value and description.

• Associate an effective date with code descriptions that can change over time.

User-defined fields

Banner EDW provides five additional user-defined fields on every dimension and fact table which allow you to extend the data in the warehouse. Including these user fields within the product tables and their related mappings means you need to make minimal changes to bring new data into the warehouse. The dimension user-defined fields are named USER_ATTRIBUTE_01-05, and the fact and aggregate user-defined fields are named USER_MEASURE_01-05. Follow the guidelines in this section to use the user-defined fields.

General guidelines

Considerations should be made when deciding what data to add to the user-defined fields. Use the following questions as guidelines when determining what data to add and where to add it.

What source data to add?

First, you must evaluate what the source of the new data is and whether this source is available within the source system and/or Banner ODS – these guidelines assume the data already exists in the staged source tables and/or Banner ODS and is available for you to use. If not, additional steps will be needed to stage the data from the source system and/or add it to the Banner ODS.

How will the new data be used?

Next, consider how the data will be used. Will it be used as an attribute or a measure? This will tell you whether it should be added to a dimension (attribute) or fact (measure) table.

If you are adding a new attribute to a dimension table shared by multiple organizations at the institution, consider whether or not those organizations will be interested in the same content. If so, you should gain input from all offices regarding the details of the new content so that you can create common attributes. If multiple organizations are not interested in the same content, consider adding the new data to a dimension table not shared by other organizations or to two different user attribute fields. This will enable user attribute columns to be optimally distributed among the storage structures while minimizing the need for customization.

Where to add data?

When trying to determine which dimension or fact table to add the user attribute to, look for dimensions or facts that contain similarly sourced data. Looking through the meta data using the Administrative UI can help you see where similar data already exists.

Is the data at same granularity as other data in star?

You must also consider whether the new data item is captured at the same level of granularity as the other data in the star. These guidelines assume the data is at the same level of granularity. If data is at a different level of granularity, additional changes will be needed within the ETL, table definitions, report structures, or the query retrieving the data.

Modifying code to support user-defined fields

Modifications to the delivered, baseline %EXTR packages will generally support all required modifications to Banner EDW source code associated with the warehouse Oracle environment. Those packages are *not* created as a part of deployed Banner EDW mappings but installed with other coded source.

Following are recommendations to keep in mind when modifying user-defined fields.

- Be sure to follow institution-defined processes for modifying, tracking, and
 documenting modifications to baseline code so that you can easily understand your
 changes and reapply them in future releases if necessary.
- Copy the table function package script (%EXTR) to an institution specific directory outside of the baseline EDW code tree.
- Rename the script to indicate that it is modified.
- Do not change the name of the object created by the script. Changing the name will require changes to the related OWB %INPUT mapping and redeployment of that mapping as well as recompiling dependent database objects.
- Construct your enhancements to the baseline source with consideration for other business areas as well as source management and testing processes during subsequent upgrades.
- Update the return row (ret_row) population section of the script to assign the desired attributes or measures to the appropriate dimension or fact table user column, or to modify the calculation of an existing column (such as age).

Terms - table function structure

The following components are used in the table function structure.

• Driving cursor – selects population that will drive extract

- Supporting cursors select supporting data related to driving population
- Processing statements
 - Invoke the defined cursors to return the data as expected within the TABLE() function, including processing loops to support processing individual rows for, at a minimum, the related institutional entities and the rows/records returned by the driving population.
 - Return row definition where selected values are assigned to staging input table columns for each row/record processed.
 - Initialization of interim storage components prior to ending each iteration of the processing loop.

Conformed dimensions

The Banner EDW uses conformed dimensions, which are dimensions shared among stars. When modifying a dimension that is shared by many stars, you need to consider the following

Will each star using a conformed dimension use the same user-defined attributes?

- If "Yes" you must update each star's table function and extract mapping to select the new user-defined field.
- If "No (meaning you want to add the user-defined field to one star but not another) there is no issue, the other stars do not need to be modified and would continue to populate the field with a null value.

Will each star using a conformed dimension need different user-defined attributes for different stars?

Since dimensions are shared between stars, each user-defined field must have one unique source and thus one unique cleansing rule across all stars that share that dimension. This means that if you wish to add two *different* user-defined attributes to the same dimension table but for different stars, you must use two different user attribute fields. For example, if you want to add hair color and legislative district to the WDT_DEMOGRAPHIC dimension for different stars, you must use USER_ATTRIBUTE_01 for one attribute and USER_ATTRIBUTE_02 for the other.

Steps to add user-defined attribute and measure values to the warehouse

Step 1 Update the extract logic that selects values from the source tables to populate the warehouse tables.

With the exception of Advancement operational stars and all aggregate stars which are populated via OWB mappings, table functions as found in %EXTR packages are used to extract the data from the Banner ODS to the Banner EDW for loads and refreshes.

The steps needed to add user-defined attributes and measure values to the warehouse depend on the type of star you want to update. Refer to the steps in the following sections to select the appropriate source value and populate the appropriate warehouse target table and column.

- "For snapshot stars" on page 7-48
- "For operational stars using the architecture which sources Banner EDW from the Banner ODS (non-Advancement operational stars)" on page 7-49
- "For Advancement operational stars using the architecture which sources Banner EDW directly from the staged source system tables" on page 7-50
- "For aggregate stars regardless of architecture" on page 7-50
- "For frozen stars regardless of architecture" on page 7-51

For snapshot stars

To add values to the user-defined attribute or measure fields, you only need to update the associated extract package for the star (or if appropriate an extract package, such as EDW_GENERAL_EXTR, used to populate columns in both the snapshot and operational stars). If the change relates to a dimensional attribute, you must also update the corresponding cleansing rule. No OWB changes are needed.

- 1. Update the snapshot star's extract package table function with desired changes.
 - There is one primary extract package per snapshot star. The naming convention is EDW_<snapshot star>_EXTR. For example, the Snapshot Employee Star's extract package is EDW_EMPLOYEE_EXTR. However, other %EXTR packages such as EDW_GENERAL_EXTR may be used to support population of columns common to both Snapshot and Operational stars.
- 2. Within the package, locate the corresponding driving or supporting cursor which will select your attribute or measure and update it. Most (though not all) changes will be made within the %pop cursor.
- 3. Within the package, locate the return row definition for the staging table input column corresponding to your user-defined attribute or measure and update it to be populated with the modified cursor value. Note that some changes, such as changes to calculate

age based on values such as the first day of an academic period (rather than sysdate) will only require changes to the return row.

- **4.** Recreate the package under the EDWSTG schema.
- **5.** Grant execute on the package to IA_ADMIN.

This ensures that permissions were not lost. Remember that you run load and refresh jobs from the Administrative User Interface using records in the IA_ADMIN schema tables.



Population processes for snapshot stars will only impact data populated in the related Star Schema *after* the change and related Cleansing setup is completed. You will *not* be able to reload data to existing snapshots except for those milestone events related to 'Final State' data storage in the source system (such as 'final' for academic period or fiscal period.) Reloading milestone events (not 'final') will invalidate the time perspective of the data.

For operational stars using the architecture which sources Banner EDW from the Banner ODS (non-Advancement operational stars)

To add values to the user-defined attribute or measure fields, you only need to update the extract package and if it is a dimension attribute, the corresponding cleansing rule. No OWB changes are needed.

1. Update the Operational Star's extract package containing its table function with desired changes.

For operational stars, there is one extract package per product area. The naming convention is EDW_product>_EXTR. For example, all student operational stars table functions are contained within the extract package EDW_STUDENT_EXTR. The product extract packages are EDW_GENERAL_EXTR, EDW_STUDENT_EXTR, EDW_FINAID_EXTR and EDW_RAP_EXTR.

- 2. Within the package, locate the table function that populates the operational star to which you want to add the user field.
- **3.** Within the table function, locate the corresponding driving or supporting cursor which will select your attribute or measure and update it to select your new field.

Since the cursors in these packages can be shared across stars and packages, be sure this change will not negatively impact other stars. For example, the EDW_STUDENT_EXTR package makes repeated reference to cursors in other packages such as EDW_GENERAL_EXTR.

- **4.** Within the identified table function for the star to be updated, locate the return row definition for the staging table input column corresponding to your user-defined attribute or measure and update it to be populated with the modified cursor value.
- **5.** Recreate the package under the EDWSTG schema.
- **6.** Grant execute on the package to IA_ADMIN.

This ensures that permissions were not lost. Remember that load and refresh jobs are run from the Administrative User Interface using records in the IA_ADMIN schema tables.

For Advancement operational stars using the architecture which sources Banner EDW directly from the staged source system tables

To add values to the user-defined attribute or measure fields, you need to update the extract OWB mappings and if it is a dimension attribute, the corresponding cleansing rule.

- 1. Locate your mapping within the appropriate OWB Project either APM_GENERAL or APM_ADVANCEMENT. Source specific mappings end with the suffix 'A' for Advance or 'B' for Banner Advancement.
- 2. If you are adding an attribute, update the associated D1 mapping within the Project>Oracle>EDWSTG module, for example, <dimension>_D1A or <dimension>_D1B, to map the new value to the dimension's user attribute.
- **3.** If you are adding a measure, update the associated F1 mapping within the Project>Oracle>EDWMGR module, for example, <fact>_F1A or <fact>_F1B, to map the new value to the fact table's user measure.
- **4.** Save the changes.
- **5.** Deploy the mapping.

For aggregate stars regardless of architecture

Use the following steps to add values to the user-defined attribute or measure fields of an aggregate star.

- 1. Locate the aggregate mapping within the appropriate OWB Project.
 - There are no source specific aggregate mappings.
 - If changing an Advancement aggregate, the aggregate mapping naming convention is <aggregate>_A1
 - If changing a non-Advancement aggregate, the aggregate mapping naming convention is EDW_<aggregate>_AGG_INSERT

- 2. Map the new value to the aggregate star's user measure. It is likely that the user measure for an aggregate will be sourced from an updated operational star's user measure.
- **3.** Save the changes.
- **4.** Deploy the mapping.

For frozen stars regardless of architecture

Follow these guidelines when updating frozen stars.

- The corresponding operational or aggregate star which sources the frozen one must be modified to include the user measure.
- Once the corresponding operational or aggregate star is updated, no changes are required to populate the frozen star, links between the frozen star's user measure fields and the corresponding star's user measure fields are already in place.

Step 2 Link cleansing rules to new user-defined dimension attribute.



This step only applies if you've added a user-defined dimension attribute; it does not apply to user-defined measures.

Perform the following steps within the Administrative UI.

- 1. Select Options>Set Up and Maintain Cleansing Processes.
 - If the user-defined value you've added already can be linked to an existing Cleansing rule, skip to the next step.
 - Else, go to Set Up and Maintain Cleansing Rules and create a new cleansing rule with appropriate source query. See the Set Up Cleansing chapter for more details.
- 2. Select Options>Set Up and Maintain Cleansing Processes>Set Up and Maintain Cleansing Data Elements.
 - **2.1.** Select the dimension table that will be updated with your user-defined attribute and select **Search**.
 - **2.2.** Select the USER_ATTRIBUTE column 01-05 you modified in Step 1.
 - **2.3.** Within the Update a Cleansing Data Element screen, update the **Rule Name** field with the appropriate cleansing rule.
 - 2.4. Click Save.

Your new user-defined attribute value will now be cleansed by the appropriate cleansing rule.

Step 3 Update meta data to reflect the change (Optional)

If you use the published meta data to document source to target relationships, refer to the "Meta Data (Banner ODS and Banner EDW)" section of the Administrative User Interface chapter to add corresponding data for the new column.

- 1. Create a new target column for the updated dimension or fact table, naming the column as it is in the database, i.e., USER_ATTRIBUTE_01-05 or USER_MEASURE_01-05.
- 2. Give the column a new Business Name, Definition, and other information to match the new use for the column.
- **3.** Save the changes.
- **4.** From the same target column page, select Add Local Mapping at the bottom.
- **5.** Select and save the appropriate source details.
- **6.** Publish meta data.

The new column will be available.

Step 4 Reload data via the Administrative UI to populate the new field

- 1. Select the appropriate jobs to reload the data that will access the new field.
- 2. If the new field is in an operational star, you must also reload the related aggregate stars.



Population processes for snapshot and frozen stars will only impact data populated in the related star schema after the change and related Cleansing setup is completed. You will not be able to reload data to existing snapshots or frozen concepts except for those milestone events related to 'Final State' data storage in the source system (such as 'final' for academic period or fiscal period.) Reloading milestone events (not 'final') will invalidate the time perspective of the data.

3. Confirm that the correct data is loaded into the modified dimension or fact.

Step 5 Update delivered Cognos models to expose and appropriately label the user-defined attribute or measure (Optional)



You only need to perform this step if you are using the delivered Cognos content.

The delivered Cognos Framework Manager Models have the following three layers.

- Database View
 - Reference to database objects
 - Table names and select columns given business names
 - User attribute and measure columns already present in database layer but do not have business names
 - Fact tables obtain "Measure" suffix
 - Some concatenated unique keys added
 - · Some formatting and aggregation defined
- Business View
 - Business-centric grouping of objects
 - Business-centric table aliases created
 - Business-centric relationships/joins created
 - Alternative aggregation query items defined, for example, averages, headcounts, percents, counts
- Presentation View
 - End user experience/layer that is published to the end-users
 - Commonly used items grouped together
 - Folders used to remove clutter
 - Commonly used filters, calculations created
 - Customizable parameter driven items created

Perform the following steps to update the Cognos packages.

- 1. Update the Database View layer for the table/column you modified.
- 2. Rename the USER_ATTRIBUTE/MEASURE_01-05 and their corresponding short description (SD) and long description (LD) columns in the table you modified to have business names.
- **3.** Update the Business View layer to use these new names.
- 4. Update the Presentation View layer to include the new code and description fields in the appropriate Query Subject.
- 5. Update the appropriate Package Definitions to select the new fields to be published.

You will then be able to access the new fields via the newly published packages and use them through the various Cognos Studios such as Report Studio and Query Studio. **6.** Update the Cube transformer model with the new columns and republish it. (Optional)

Multi-Entity Processing

The Multi-Entity Processing (MEP) framework is available for all target database composite views, composite tables, and reporting views. This enables all information from multiple sources (data sources, institutions, campuses, etc.) that is located in one database to be selectively assigned security access as needed in the target database.

Example:

You can take existing data from one database for use in multiple institutions, move information into the target database, selectively restrict the user access to data by institution, and so on.

The MEP columns only appear on generated meta data reports in the Administrative UI if MEP is set up for your institution.



To use MEP with your source system and target database, Professional Services must provide the needed analysis, subsequent product enhancements, and set up. This includes identifying source tables that require MEP, and the target database objects to be modified.

Administrative User Interface

The Administrative User Interface (UI) is Web-based and uses Banner Web Tailor. The Administrative UI is used to set up and maintain the target database and warehouse, including initiating and monitoring ETL processes. Administrative functions include:

- Preferences and Security Use to manage security, set global preferences, and set up user accounts.
- Options Use to control the processes to extract and load data into Banner ODS and Banner EDW, schedule a process, view control reports, view and/or remove scheduled processes, and maintain information about saving (freezing) data.
- Meta Data Use to view and manage the meta data supporting the systems.
- New Banner Web Tailor Administration Use to customize a Web menu, procedure, graphic element, set of information text, or a set of menu items. You can also update user roles, customize a Web module, Web rules, or Banner Web Tailor parameters; customize a login return location; and customize Banner Web Tailor overrides or global user interface settings.

Banner ODS data model

Banner ODS delivers a data model that includes data from a number of higher education administrative system modules. The administrative system modules supported by the Banner ODS data model include Student, Financial Aid, Advancement, Human Resources and Finance — including Accounts Receivable. Each module, or area of information, includes a number of tables in the administrative systems. The data model brings the appropriate data elements, from multiple tables in the source system, into a different table structure in the Banner ODS to support the reporting needs of the entire institution.

The data model represents the data elements that are included in Banner ODS. Banner ODS shows the individual table and the relationship with other tables stored within the model. It further includes all the data elements available in Banner ODS composite tables and/or the reporting views related to the object described.

Multiple source databases

The SRP architecture supports stage tables from different source databases. The only requirement to load information from multiple sources into the SRP stage tables is that the schema and table names in the source databases must be unique.



Because the schema and table names in the source databases must be unique, you cannot load information from two different Banner databases into the SRP.

Source Alias

The Source Alias (source_alias) uniquely identifies each source database. You specify the source_alias during the installation or upgrade process. The source_alias is then used to create a parameter in Web Tailor, which associates each source_alias to a database link owned by ODSSTG. This approach allows the database link to the source to be changed while minimizing the disruption to the existing SRP functionality.

Source Alias in Streams framework

In the Streams framework, the Source Alias is used as a prefix when naming the various Streams components. The prefix identifies the source database and the suffix identifies the Streams component. For example, the Streams component BANNER\$APP is associated with the source alias of BANNER, and is an apply process.

The following table lists the database location and suffix for each Streams component. The Source Alias is added to the beginning of each Name Suffix to uniquely identify the Streams component.

Streams Component	Database location	Name Suffix
Capture	Source	\$CAP
Capture queue	Source	\$CAPQ
Capture queue table	Source	\$CAPQT
Propagation	Source	\$PROP
Apply queue	Banner ODS	\$APPQ
Apply queue table	Banner ODS	\$APPQT
Apply	Banner ODS	\$APP

Add a source database

Use the following steps to add subsequent source databases after an initial source database has been configured.

1. Run the source install steps on the source database. Refer to the Banner ODS Installation or Upgrade Guide for the source install steps.

This creates the ODSSTG administrative user with the necessary privileges, compiles the support package, and creates a database link from the ODSSTG user to the ODSSTG user on the SRP.

2. Create a database link connecting the ODSSTG user on the SRP instance to the ODSSTG user on the new source.

Streams users only perform step $\underline{3}$; Mviews users can skip to step $\underline{4}$.

3. As the ODSSTG user on the SRP, execute the following procedure from SQL*Plus.

```
SQL> SET SERVEROUTPUT ON
SQL> MGKSTRC.P_CREATE_LOCAL_ENV(database link, source
alias);
```

where you enter your institution's values for the parameter in parentheses.

4. Create schemas in the SRP.

For each schema in the source database that includes tables that will be staged in the SRP, create a schema in the SRP with the same name.

- **5.** Add the new schemas to the SRP using the Administrative User Interface.
 - **5.1.** Follow the steps in the section <u>"Add a schema"</u> in <u>Chapter 4, "Administrative</u> User Interface".
 - **5.2.** Repeat step $\underline{5}$ for each new schema you want to add to the SRP.
- **6.** Stage new tables in the SRP using the Administrative User Interface.
 - **6.1.** Follow the steps in the section "Add a non-baseline staging table to the Banner ODS" in Chapter 4, "Administrative User Interface".
 - **6.2.** Repeat step <u>6</u> for each new schema you added.

Validation table data and incremental refresh

The Banner Operational Data Store (Banner ODS) was designed with validation table codes and descriptions stored on each individual data record. This design expedites the display of information as it eliminates the need for excessive joins of as many as ten or fifteen additional tables. During the design phase of Banner ODS, several methodologies on managing validation table change requirements were discussed with institutions. The consensus was that it is preferable to build internal institutional policies and procedures to ensure that the descriptions are not changed, but new codes are added.

This is similar to the way in which Banner Course Catalog process works. If the title of the course changes, the institution creates a new catalog record with the new title for the new effective term.

Example

If a description such as "Bowling Basics" changes to "Bowling Fundamentals", it is assigned a new code so that Banner ODS reflects the past data for "Bowling Basics" and the new values are reflected for "Bowling Fundamentals".

To change a column description, the institution policy requires to either initiate a reload of all affected tables (time intensive) or create a script to update all columns in Banner ODS to alter the old value to the new value.



To ensure data integrity, do not apply updates to existing values in the validation tables once Banner ODS is in production and the incremental refresh cycle is implemented. Else, there will be inconsistencies in the information displayed between the source system and Banner ODS.

To further explain the difficulty in incrementally refreshing tables based on coded description changes and not the result of data value changes, it is necessary to understand the efforts required to implement a validation to data table refresh. First, the source system would have to be enhanced to maintain triggers on each validation table to track all DML activity. While it is possible to apply triggers to each of these tables, the trigger event is likely to have performance impact on the source system. This is because it requires the trigger to populate an entry into a change table for every row in each source data table that is populated with the altered validation table value. This requires a full table scan of every affected source table as the source system does not maintain keyed links between the validation tables and the data tables.

For example, the validation table STVDEPT is used enterprise wide in Banner Student, Banner Advancement, and Banner HR systems in eighty four (84) different tables. If a value were to be changed in the STVDEPT table, then the trigger on the STVDEPT table would have to read all 84 of the source tables to identify the key(s) of each row that contained the altered DEPT value, and then populate that key into the change table. Given the size of many of these data tables, the commit time required for the end users to wait on the change of the validation table in Banner would freeze their Banner session until the change table population took place.

Table indexes

Indexes are added based on the reporting needs of the Banner ODS and Banner EDW tables as well as performance for the incremental refresh process. The IA_ADMIN.MGBINDX table stores a list of the delivered indexes for tracking and documentation purposes. You populate this table using the following query for a release:

The MGBINDX table is used in the Banner ODS Checks and Balances process to verify that baseline indexes are valid and present. If your institution has created additional indexes, the differences are reported in the control report as warnings. To include the additional indexes in the Banner ODS Checks and Balances process, insert the new index information into the IA_ADMIN.MGBINDX table using SQL. Refer to the

MGBINDX_DATA_ODS.SQL script in the dbscripts directory for a syntax example. Set the LOCAL_IND = 'YES' to identify this as your institution's index. The local records in this table will be preserved with future upgrades. We recommend that you do not delete baseline rows from the MGBINDX table.

The Banner ODS metadata also uses the delivered indexes when documenting the Recommended Search Columns. The script update_recsearchconds.sql (located in the dbscripts/utility_scripts directory) is used to generate that information based on the actual indexes in the database. If you add local indexes, it is recommended that you run the script (from the IA_ADMIN account) so the list of Recommended Search Columns accurately reflects the database.

Product-specific information

This section discusses the Banner ODS or Banner EDW information unique to individual Banner products.

Banner Common

The Banner ODS VALIDATION reporting view provides access to all of the Banner product validation table values to be used when creating a pull-down list of values (LOV) for parameters. This reporting view can be used by a variety of reporting tools. The MGT_VALIDATION table is the source for the reporting view and is used to build the LOV views that reside in the ODSLOV schema. The source for the MGT_VALIDATION ODS composite table is a series of composite views listed below. These views retrieve the values from specific product validation tables that are used within the Banner ODS.

Performing a select distinct on a code within a reporting view may be a valid solution to generate a List of Values. However, this method will likely cause a performance impact on the system. The VALIDATION reporting view can instead be used as a pull-down list. It provides the appropriate Banner Validation Table name as a filter for VALIDATION.TABLE_NAME.

The information on the List and Detail Reports pages can be viewed online or exported to a CSV file (Microsoft Excel format) or XML file for printing or additional manipulation. Following are the composite views:

- AA VALIDATION
- AF VALIDATION
- AG VALIDATION
- AN VALIDATION
- AP_VALIDATION
- AR_VALIDATION

- AS_VALIDATION
- AT_VALIDATION

Each of these Banner composite views extracts values from validation tables in their respective Banner product areas. Also included are the status indicators, effective dates, and sometimes the qualifiers.

Within Banner Finance, there are several groups of values stored within the FTVSDAT System Data Maintenance table. To properly represent some of these values, they have been pulled into the AF_VALIDATION composite view with the TABLE_NAME as follows:

- GRANT_CATEGORY represents all grant categories stored within FTVSDAT.
- GRANT_SUBCATEGORY represents all grant sub categories stored within FTVSDAT.
- GRANT_TYPE represents all grant types stored within FTVSDAT.

Values have been added to table FTVFSPD to represent beginning and ending periods. The added values are '00', '13', and '14'. The FTVFSYR table has for its description, the Fiscal Year converted to a four-digit year.

In specific situations, Banner source tables were not used. The following is a compiled list of data element names used in place of Banner specific tables names.

The hard coded TABLE NAMES are as follows:

- ACADEMIC_TITLE
- ACCOUNT ATTRIBUTE TYPE
- ACCOUNT_ATTRIBUTE_VALUE
- ACCOUNT CLASS
- ACCOUNT_LEVEL_1
- ACCOUNT_LEVEL_2
- ACCOUNT_LEVEL_3
- ACCOUNT_LEVEL_4
- ACCOUNT_POOL
- ACCOUNT SET CODE
- ACCOUNT_TYPE_ATTR_TYPE
- ACCOUNT_TYPE_ATTR_VALUE
- ACCOUNT_TYPE_LEVEL_1

- ACCOUNT_TYPE_LEVEL_2
- ACCOUNT_TYPE_SET_CODE
- ADVISOR_NAME_LFMI
- ASSIGNMENT_GRADE
- CALENDAR_MONTH
- CALENDAR_YEAR
- COLLECTION_AGENCY_NAME
- CONTRACT_NUMBER
- CONTRACT_TYPE
- COURSE_IDENTIFICATION
- COURSE_REFERENCE_NUMBER
- EMPLOYEE_STATUS
- EMPLOYEE_TIME_STATUS
- ENDOWMENT_FUND
- ENTITY_TYPE
- FINANCIAL_AID_SOURCE_TYPE
- FINANCIAL_AID_TYPE
- FINANCIAL_MANAGER
- FISCAL_QUARTER
- FUND_ATTRIBUTE_TYPE
- FUND_ATTRIBUTE_VALUE
- FUND_LEVEL_1
- FUND_LEVEL_2
- FUND_LEVEL_3
- FUND_LEVEL_4
- FUND_LEVEL_5
- FUND_POOL
- FUND_SET_CODE
- FUND_TYPE_ATTR_TYPE
- FUND_TYPE_ATTR_VALUE

- FUND_TYPE_LEVEL_1
- FUND_TYPE_LEVEL_2
- FUND_TYPE_SET_CODE
- GENDER
- INSTALLMENT_PLAN
- INSTRUCTOR_NAME
- INTENDED_TIME_STATUS
- INTERNAL_ACCOUNT_TYPE
- INTERNAL_FUND_TYPE
- LOCATION_LEVEL_1
- LOCATION_LEVEL_2
- LOCATION_LEVEL_3
- LOCATION_LEVEL_4
- LOCATION_LEVEL_5
- ORGANIZATION_ATTR_TYPE
- ORGANIZATION_ATTR_VALUE
- ORGANIZATION_LEVEL_1
- ORGANIZATION_LEVEL_2
- ORGANIZATION_LEVEL_3
- ORGANIZATION_LEVEL_4
- ORGANIZATION_LEVEL_5
- ORGANIZATION_LEVEL_6
- ORGANIZATION_LEVEL_7
- ORGANIZATION_LEVEL_8
- ORGANIZATION_POOL
- ORGANIZATION_SET_CODE
- ORG_FINANCIAL_MANAGER
- POSITION_STATUS
- POST_SECONDARY_SCHOOL

• PREF_CLAS

- PRINCIPAL_INVESTIGATOR
- PROGRAM_ATTR_TYPE
- PROGRAM_ATTR_VALUE
- PROGRAM_LEVEL_1
- PROGRAM_LEVEL_2
- PROGRAM_LEVEL_3
- PROGRAM_LEVEL_4
- PROGRAM_LEVEL_5
- PROGRAM_SET_CODE
- RECEIVABLE_CONTRACT
- RECEIVABLE_DELINQUENCY
- RECEIVABLE_EXEMPTION
- SECONDARY_SCHOOL
- SPORTS

Banner Finance

The following table explains the use for FIELD_CODE and LEDGER_IND within the TRANSACTION_HISTORY reporting view for Banner Finance. The LEDGER_IND and FIELD_CODE work together to drive what ledger amount field was updated.

LEDGER_ IND	Ledger	FIELD_ CODE	Amount Field Updated	Description
G	General	01	Sum_Periodic_Debits	Debits
		02	Sum_Periodic_Credits	Credits
O Operating	Operating	01	Curr_Adopted_Budget	Current Period Original Budget
		02	Curr_Budget_Adjustments	Current Period Budget Adjustment
		03	Curr_Year_To_Date_Activity	Current Period Activity
		04	Curr_Encumbrances	Current Period Purchase Order and General Encumbrance
		05	Curr_Budget_Reservation	Current Period Requisition Budget Reservation
		06	Curr_Accumulated_Budget	Current Period Accounted Budget

LEDGER_ IND	Ledger	FIELD_ CODE	Amount Field Updated	Description
		07	Curr_Temporary_Budget	Current Period Temporary Budget
		08	Curr_Grant_Activity	Obsolete
E	Encumbrance	01	Original_Amount	Original Encumbrance Amount
		02	Curr_Adjustments	Encumbrance Adjustments
		03	Curr_Liquidations	Encumbrance Liquidations

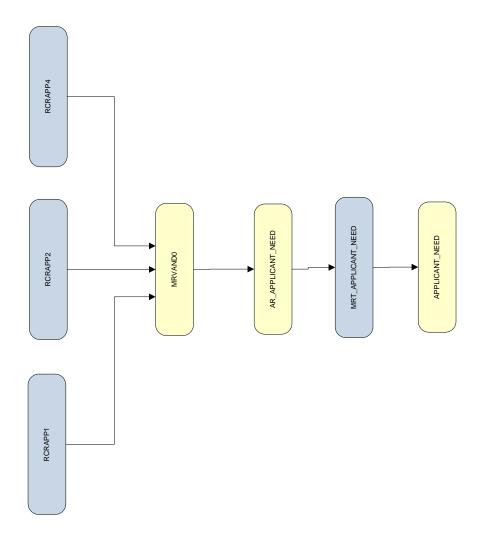
Banner Financial Aid key views architecture

Due to the complex architecture of some Banner Financial Aid views, the following flow charts illustrate how those Banner Financial Aid reporting views are built from Banner to the Banner ODS.



These diagrams only refer to key views and key tables used within the reporting views.

MRT_FINAID_APPLICATION4 AR_FINAID_APPLICATION4 RCRAPP4 MRT_FINAID_APPLICATION4 MRT_FINAID_APPLICATION3 AR_FINAID_APPLICATION3 RCRAPP3 NEED_ANALYSIS MRT_FINAID_APPLICATION3 MRT_FINAID_APPLICATION2 AR_FINAID_APPLICATION2 RCRAPP2 NEED_ANALYSIS_FEDERAL_METHOD NEED_ANALYSIS_INST_METHOD NEED_ANALYSIS_DEMOGRAPHIC MRT_NEED_ANALYSIS_ISIR_SPEC AR_NEED_ANALYSIS_ISIR_SPEC NEED_ANALYSIS_ISIR_SPECIFIC MRT_FINAID_APPLICATION2 RCRESAR MRT_FINAID_APPLICATION1 MRT_FINAID_APPLICATION1 AR_FINAID_APPLICATION1 RCRAPP1 NEED_ANALYSIS_PROFILE_SPEC MRT_NEED_ANALYSIS_PROFILE_SPEC MRT_NEED_ANALYSIS_PROFILE_SPEC AR_NEED_ANALYSIS_PROFILE_SPEC RCR1MP1 MRT_NEED_ANALYSIS_OVERRIDE AR_NEED_ANALYSIS_OVERRIDE NEED_ANALYSIS_OVERRIDE RNROVRD



Banner Student

When a new base student record is created in Banner, a new record is created in the Banner ODS table MST_BASE_STUDENT. Each record in this table contains a range of academic periods in which the student status allows the student to register. If the status prevents the student from registering, then the beginning and ending academic periods in the Banner ODS record are the same and match the Banner effective term.

Banner Student data extraction for the MST_GENERAL_STUDENT composite table

Creating a new record within one of a number of Banner tables indicates to the Banner ODS that the student has activity within the specific term. As a result, a new record is created in the MST_GENERAL_STUDENT table for the student and term when the Banner ODS is loaded or refreshed.

Following is a list of Banner tables that define student activity in the Banner ODS:

- SGBSTDN student base table
- SFBETRM student registration table
- SHRTTRM institutional course maintenance term header table
- SHRTRAM attendance period by transfer institution table
- SHRDGMR degree table
- SGRCHRT student cohort table
- SGRSPRT sport table
- SGRSATT student attribute table
- SGRSACT student activity table
- SGRCOOP cooperative education table
- RPRATRM applicant award by term table
- RORSTAT applicant status table
- TBRACCD account charge/payment detail table
- TBBCSTU contract student authorization table

The MST_GENERAL_STUDENT table also contains information about each student's program of study. This table contains one record per student per academic period with student activity per curricula.

Additional 'Zero' record in the Banner ODS tables

In Banner, the values for student classification and academic standing are specific for a student, academic period, and their primary program level only. In the Banner ODS, many reports require student classification and academic standing data for all student curricula, regardless of the level value. To create comprehensive reports while limiting the number of outer-joins used, a single record with a value of zero for the key fields (person_uid, student_level, and academic_period) is inserted into the

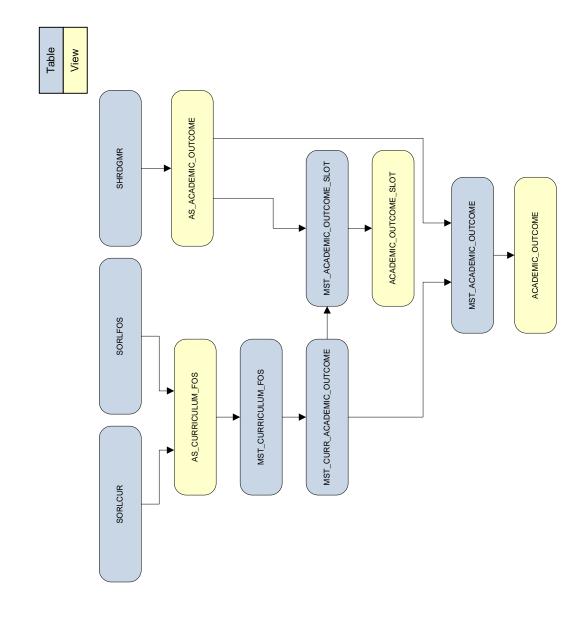
MST_STUDENT_CLASSIFICATION and MST_ACADEMIC_STANDING composite tables as a step in the load mappings. Existing student classification and academic standing values are displayed if they exist for a specified student, level, and academic period. Otherwise, the NULL values from this new record are displayed.

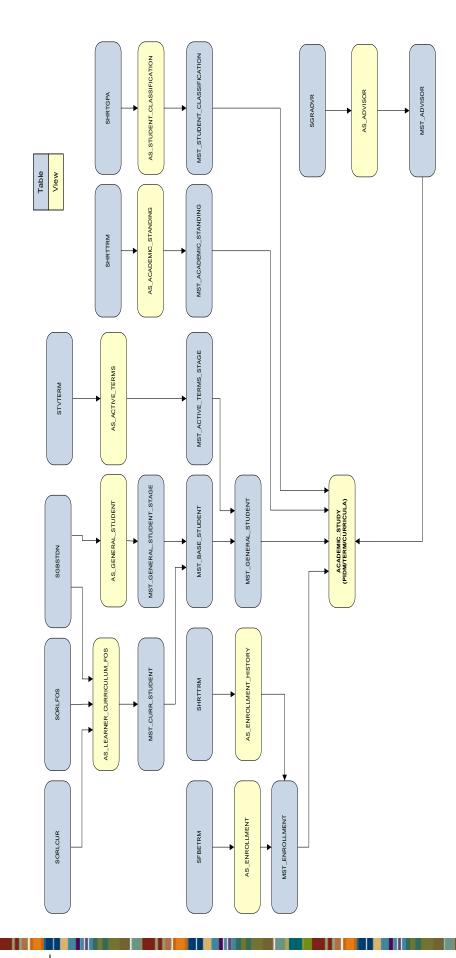
Key Banner Student views architecture

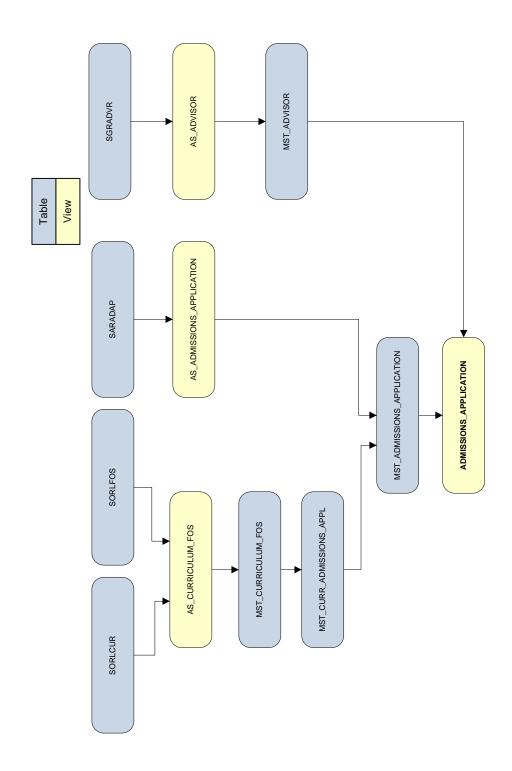
Due to the complex architecture of some Banner Student views, the following flow charts illustrate how those Banner Student reporting views are built from Banner to the Banner ODS.

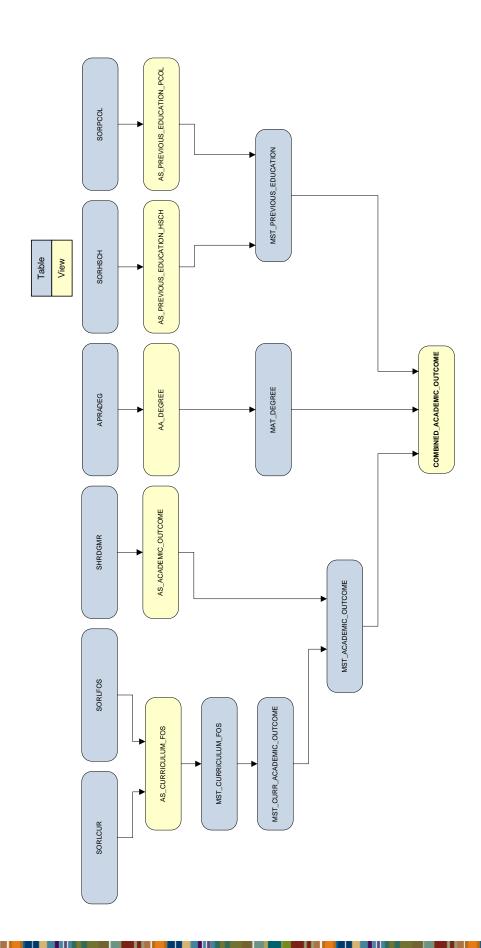


These diagrams only refer to key views and key tables used within the reporting views.

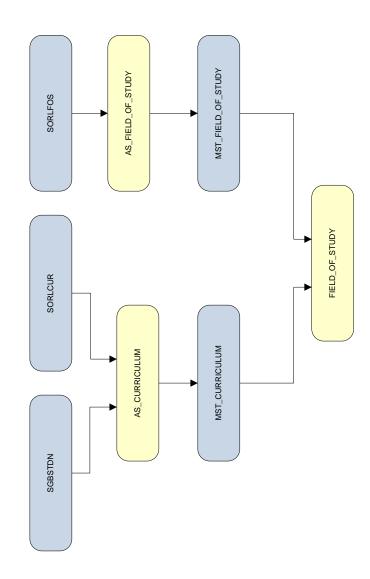


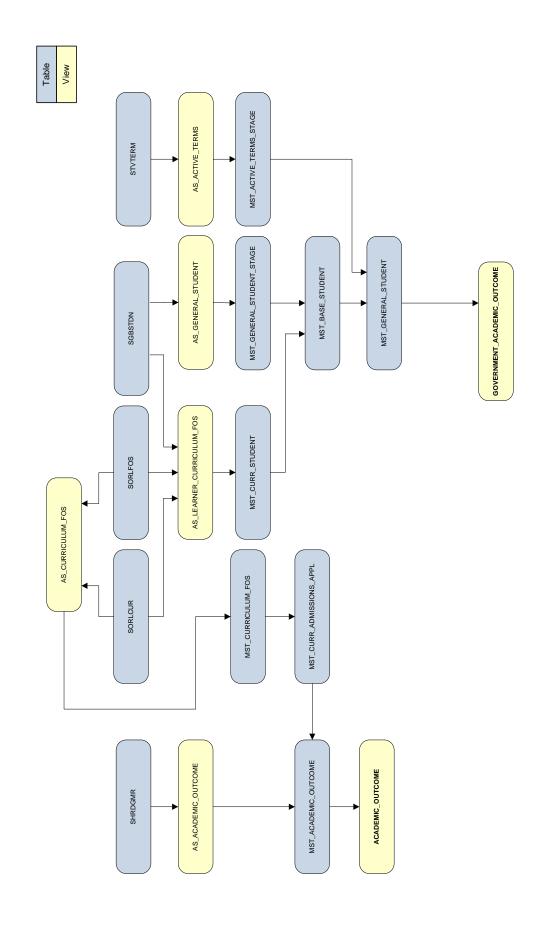


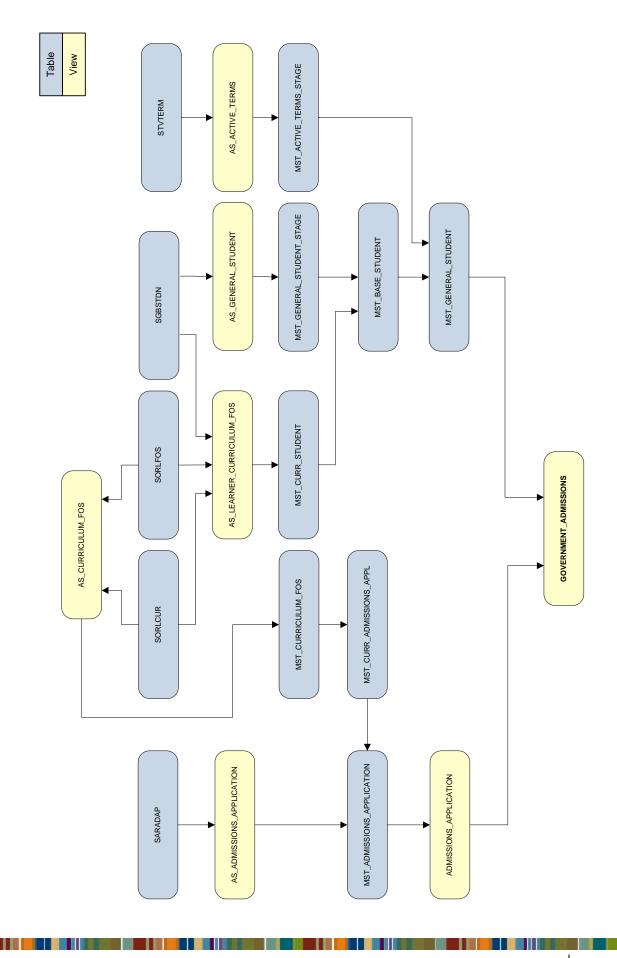


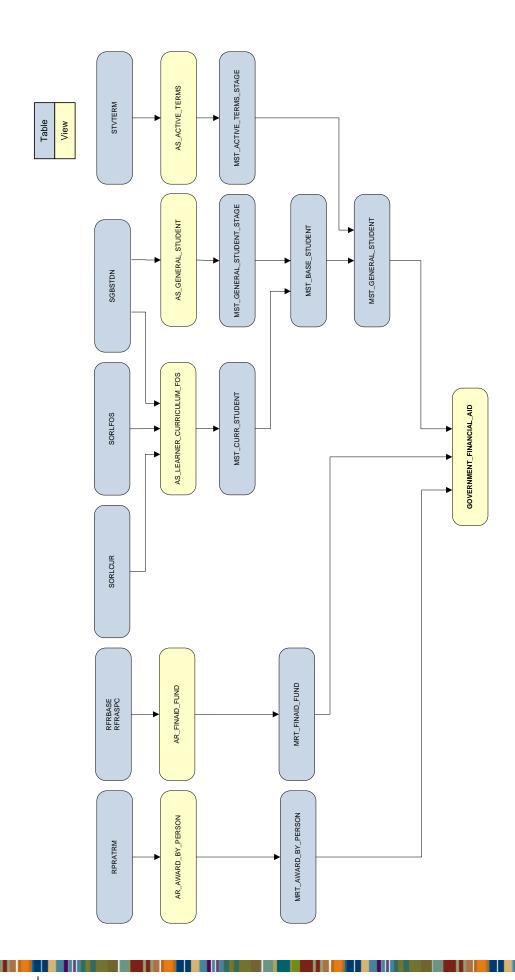


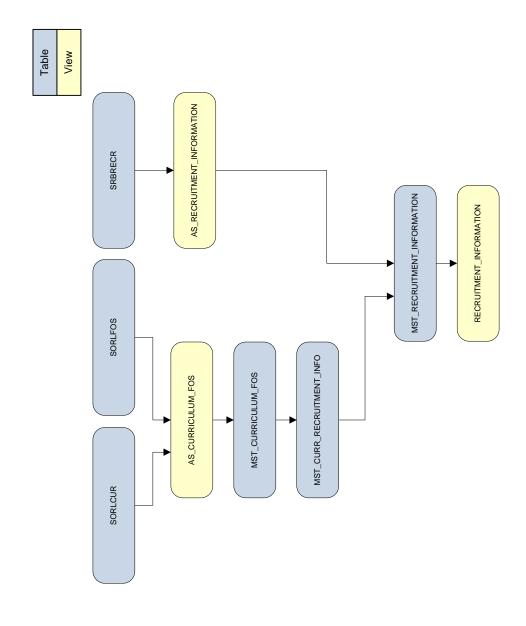


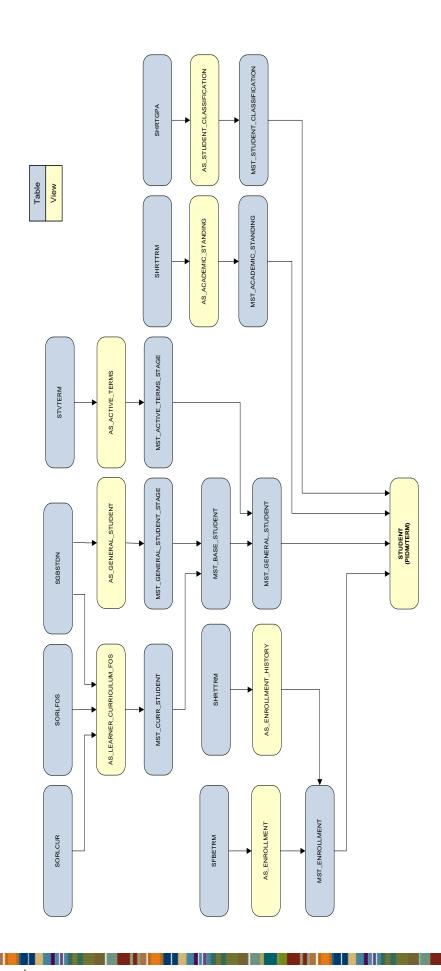












Composite views and meta data

The composite views gather Banner source data necessary to populate and maintain the information stored in the Banner Operational Data Store (Banner ODS). This source information then updates the information that resides in the Banner ODS database.



Any institution change to a composite view impacts the Banner ODS maintenance processes.

The Banner ODS composite view meta data is also available as published meta data. Use the following steps to view published composite view meta data reports using the Administrative UI.

- 1. Select **Meta Data** from the Administrative menu.
- 2. Select Banner Operational Data Store.
- 3. Select the **Banner ODS Composite View Meta Data Reports** link located at the top right-hand corner of the page.
- 4. Select a subject area.

The Composite View Meta Data Reports page opens listing the view name and description.

5. To display the column details associated with the selected composite view, select one of the composite views. A description of each field on the report appears below:

Field	Description
Description	Business description of the composite view target, including the key and frequency of data returned by the view.
Target Column	Name of the column in the composite view target.
Business Definition	Definition of the target column in business terms.
Database Data Type	Used for formatting purposes when writing reports.
Business Data Type	Used to store client-specific data about a given column. This field is empty by default.
Domain Value	Used to store client-specific data about a given column. This field is empty by default.

Field	Description
Source Name	Name of the source table, FUNCTION, CONSTANT, or CALCULATION.
Source Colum	Name of the source column from the source table or view, if the source is a table or view; name of the PL/SQL function, if the source is FUNCTION; description of the constant, if the source is CONSTANT; description of the calculation used, if the source is CALCULATION.

Naming conventions

This section describes the naming conventions and standards applied to scripts and database objects used to create and maintain the BPRA solutions.

Banner EDW standards (EDWMGR/EDWSTG schemas)

Warehouse tables

Star schema tables (EDWMGR schema)

Object name:

Maximum length is 30 characters. See the table below.

1 st Character	W - Warehouse	System Descriptor
2 nd Character	D - Dimension F - Fact	Star Schema Table Type
3 rd Character	<i>T</i> - Table Z - Snapshot Table	Object Identifier
4 th Characters	_ (underscore)	
5-5 th -30 th Characters	Unique Descriptor	

Examples:

WDT_TIME, WFT_EMPLOYEE_DETAIL

Additional detail:

Script names are the same as the object name.

Staging tables (EDWSTG schema)

Object name:

Maximum length is 30 characters. See the table below.

1 st Character	W - Warehouse	System Descriptor
2 nd Character	T - Temporary	Warehouse Table Type
3 rd Character	T - Table	Object Identifier
4 th Characters	_ (underscore)	
5-5 th -30 th Characters	Unique Descriptor,	
	ending in any:	
	_INPUT	
	_CLEAN	
	_ERROR	
	_WKEYS	

Examples:

WTT_DEGREE_DETAIL_INPUT, WTT_ENROLLMENT_WKEYS

Additional detail:

Script names are the same as the object name.

Sequences

Object name:

Maximum length is 30 characters. See the following table:

1 st Character	W - Warehouse	System Descriptor
2 nd Character	D - Dimension	Product Identifier
3 rd Character	S - Sequence	Object Identifier
4 th Characters	_ (underscore)	
5-5 th -30 th Characters	Unique Descriptor, ending with _SEQ	

Examples:

WDS_GIFT_SEQ, WDS_JOB_SEQ

Additional detail:

Sequences are created within the scripts that create the dimension tables.

Indexes and Constraints

Primary key indexes and constraints

Object name:

Maximum length is 30 characters. See the following table:

1 st Character	PK_ (underscore)	Primary Key Prefix
4 th -30 th Characters		Table Name or Abbreviation (includes the first 4 characters, e.g., WFT_)

Examples:

PK_WFT_EMPLOYEE, PK_WFT_OPERATING_LEDGER

Foreign key constraints

Object name:

Maximum length is 30 characters. See the following table:

1 st - 2 nd Character	FK	Foreign Key Prefix
3 rd Character	n	Where n is a one-up number
4 th Characters	_ (underscore)	
5 th -30 th Characters		Child Table Name (omits the
		first 4 characters, e.g.,
		WFT_)

Administrative standards (IA_ADMIN schema)

Administrative tables

Object name

Maximum length is 30 characters. See the table below.

1 st Character	<i>M</i> - Mart	System Descriptor
2 nd Character	D - Control ReportsG, T - General Purpose	Table Purpose
3 rd Character	B - BaseR - RepeatingT - TemporaryV - Validation	Table Type
4 th -7 th Characters	Unique Descriptor	

Examples:

MDBLOGH, MTVPARM

Additional detail

Script names *must* follow unique 7-character naming standards. Script names are the same as the object name.

Administrative packages

Object name

Maximum length is 30 characters. See the table below.

1st Character	<i>M</i> - Mart	System Descriptor
2 nd Character	G - General Purpose	Product Identifier
3 rd Character	K - Package	Object Identifier
4 th -7 th Characters	Unique Descriptor	

Examples:

MGKSECR, MGKPARM

Additional detail

Script names *must* follow unique 7-character naming standards. Script names are the same as the object name.

Meta data tables and views

Object name

Maximum length is 30 characters. See the table below.

1 st Character	W - Warehouse	System Descriptor
2 nd Character	M - Meta Data	Table Purpose
3 rd Character	T - Table or V -View	Object Identifier
4 th Character	_ (underscore)	
5 th -30 th Characters	Unique Descriptor	

Examples:

WMT_SOURCE, WMV_TARGET_OBJECT

Additional detail

Script names are the same as the object name.

Sequences

Object name

See the table below.

1 st Character	M - Mart	System Descriptor
2 nd Character	G - General Purpose	Product Identifier
3 rd Character	S - Sequence	Object Identifier
4 th -7 th Characters	Unique Descriptor	

Examples:

MGSHOST, MGSPARM, MGSPIDM, MGSSDAX

Additional detail

Script names *must* follow unique 7-character naming standards. Script names are the same as the object name.

8 Cognos and BPRA Integration

A critical factor in determining the success of a reporting solution is the existence of a well defined and useful meta data layer. The meta data layer enables you to define relationships between objects in the database. It also enables additional filtering or formatting that can be useful to you when creating reports.

The Cognos Business Intelligence meta data layer is delivered as part of the warehouse. Relationships between the reporting views in the warehouse are included in these meta data layers for the supported reporting tools. Relationships between the dimension and fact tables in the Banner Enterprise Data Warehouse (SRP) are included in these meta data layers.

The meta data layer provides the joins used by the database to connect the views or database tables so that you do not need to define those relationships when creating queries or reports using the reporting tools. You can use any reporting tool with the Banner Performance Reporting & Analytics products; however, you gain added value from using the Cognos meta data layers created and delivered with the products.

The warehouse reporting meta data defines the database column definitions and how to aggregate measures. It also provides a presentation view of the data to facilitate reporting.

In Cognos Business Intelligence, the reporting meta data is defined using the Cognos Business Intelligence Framework Manager (FM) to create FM models.

IBM Cognos Business Intelligence (IBM Cognos BI) software

Ellucian offers IBM Cognos Business Intelligence (IBM Cognos BI) software as part of our solution to address the needs of your institution. IBM Cognos BI solutions let your institution improve and direct performance by helping to enable the key steps in the management cycle – from query and reporting, to analysis, to measuring and monitoring performance with dashboarding and scorecarding.

The Ellucian partnership with IBM Cognos provides you with a superior business intelligence solution, primarily by leveraging the Banner Operational Data Store (Banner ODS) and Banner Enterprise Data Warehouse (Banner EDW) solutions in conjunction with the Cognos Business Intelligence suite. As part of the Banner ODS/Banner EDW solutions we also provided the end-user reporting layer for IBM Cognos. Additionally, for

the Banner EDW solution, Ellucian has built the IBM Cognos cubes required to leverage the IBM Cognos OLAP reporting tool.

IBM Cognos provides a unified decision workspace that lets you view, assemble and personalize data quickly, according to your needs and without help from IT. With IBM Cognos, you can:

- Combine data from any source and explore it from any perspective for a complete understanding of outcomes, opportunities, threats and trends.
- Expand your expertise beyond traditional business intelligence capabilities without needing to switch tools or learn new applications.
- Analyze facts and anticipate outcomes simply by shifting perspectives and time horizons.
- Enable business users to increase their personal productivity and independence from IT.

IBM Cognos Business Intelligence Query and Reporting

From professional report authors responsible for designing one-to-many reports for the enterprise, to business users who need the ability to create their own ad hoc queries or customize existing reports, IBM Cognos Business Intelligence Query and Reporting fits the needs of users across the organization. With IBM Cognos Business Intelligence Query and Reporting, users are equipped with the information they need to make fact-based decisions in a system that's simpler, faster and easier to manage.

This includes Report Studio which is a 100% Web-based query and report authoring tools that is adaptive and flexible in supporting a variety of simple and complex, compound report layouts, including multi-page, multi-query, and multi-source reports. Deployment options for content include On-demand as well as bursting, scheduling and event based deployment.

For end-users who want to build single query reports and charts with an easy-to-use tool, the Query Studio tool is provided. Users can construct reports in a WYSIWIG manner, dragging and dropping data elements into lists, cross-tab, or chart style reports. This tool also provides easy to implement, flexible formatting including templates, conditional formatting, different calculation options for groups and footer summaries. Compound filters can be implemented via menu options to enable ad-hoc reports to be easily adapted to new business questions.

Cognos BI query and reporting capabilities include professional report authoring capabilities that are easy to use and minimize the effort for report authors.

• Design and build – Create report templates to include standard report objects, queries, and layouts. WYSIWYG capability enables flexible and intuitive report assembly and core BI capabilities.

- Analyze and share View, interact with and analyze the result set, and share the
 results to follow a train of thought and generate a unique perspective around
 information.
- Assemble and format Drag-and-drop trusted content (BI, Metric Studio, and PowerPlay), filters and other content (RSS, HTML, text and images).
- Modify and arrange Add colors and text, add comments and personalize widgets.
- Interact and analyze Change display, add calculations, filter prompt, drill up/ down, sort data and seamlessly move to Business Insight Advanced for additional analysis.
- Share and collaborate Share and distribute objects and reports to be consumed by others

Collaborative reporting

Cognos BI query and reporting capabilities offer these collaborative reporting features to help business users communicate with others in order to drive decisions and gain additional insight.:

- Comments and annotations Create and save notes on reports that other users can then reference, making it much easier for users to share information and capture valuable insights.
- Enhanced event management Assign owners and approval processes for specific actions with the BI workflow.

Author once, consume anywhere

Cognos BI query and reporting capabilities enable you to create a single report that users can access on multiple devices, in multiple formats, and in other applications and processes.

- Import and refresh BI content in MS Office using Cognos for Microsoft Office.
- Embed BI content in third-party applications and portals using Cognos Mashup Services.
- Take reports with you on your iPhone, Blackberry and iPad with Cognos Mobile.
- Consume interactive report output offline or in a disconnected manner with Cognos Active Report.

Single metadata layer for all reporting

Regardless of the variety of reporting your organization performs, all reporting data passes through a single metadata layer. The metadata layer manages translation from the data you need to the information you see. With Cognos BI you can report, analyze, scorecard and monitor your performance with a single view of all data sources.

Dashboarding

IBM Cognos provides dashboard capabilities that allow any user to access, interact and personalize content in a way that supports the way they make decisions through Cognos Connection and Business Insight Dashboards.

Through Cognos Connection, dashboards composed of portlets can be configured by the user to display the charts of their choice, including charts that they create themselves. The user can create multiple dashboard tabs to easily access different dashboard views. Each report has multiple filters that can be configured by the user for their particular focus by selecting the prompts button for the chart. Users can also navigate to report content directly from the portal dashboard to run/schedule particular reports through the report navigation portlet or by searching report content using the search portlet. Ellucian solutions deliver several preconfigured portlet dashboards.

IBM Cognos Business Insight

IBM Cognos Business Insight provides an integrated business intelligence experience for business users. This web-based tool allows you to use IBM Cognos content to build sophisticated interactive dashboards that facilitate collaborative decision-making. These dashboards can include traditional business intelligence assets as well as external data.

IBM Cognos Business Insight enables users to assemble and explore all types of data in any time horizon through a dynamic, highly personalized interface.

IBM Cognos Business Insight helps you see more and do more with your information. It enables users to assemble and explore data in depth and in detail, then collaborate with others easily—all in a highly personalized business intelligence workspace. IBM Cognos Business Insight helps organizations drive alignment and build consensus for more agile and responsive decision-making—delivering smarter decisions for better business results.

Fast, easy access to vital information

- Gain an "at a glance" view of the business in a pre-assembled workspace.
- Shift seamlessly to business authoring or in-depth analysis on the fly, through a graduated user interface.
- Search documents and databases by keyword to find the information you need.
- Integrate external data from spreadsheets, third-party or departmental applications for ad hoc reporting and analysis
- Change chart types, add pre-defined or custom calculations, sort and reorder data and add filters to highlight key information.
- Merge external data with dimensional and relational data sources using simple drag-and-drop tools.

• Use intuitive, menu-driven tools to manipulate data easily, without assistance from IT.

The Business Insight Dashboard tool provides users with a web-based user interface that allows you to open or edit a dashboard or to create a dashboard. This dynamic dashboard interface provides an intuitive and interactive to allow business users to personalize content to fit their needs. Business users can use a free-form layout to add dashboard elements such as reports and charts, images, RSS feeds, textual objects, or slider filters. In addition, they can interact with reports to Change display, add calculations, filter/prompt, drill up/down, and sort data and seamlessly move to Business Insight Advanced (Called Cognos Workspace Advanced) for additional analysis.

Scorecarding

IBM Cognos provides scorecard capabilities that allow you to see how your institution is performing based on defined key performance indicators (KPIs).

At-a-glance information to successfully link strategy to operations

IBM® Cognos® Business Intelligence Scorecarding enables organizations to capture corporate strategy and communicate that strategy at the operational level. It helps executives and managers provide quantifiable goals and targets, and allows them to track performance across business units, operating subsidiaries and geographic regions to quickly identify areas that need attention.

IBM Cognos Business Intelligence Scorecarding automates the strategy management process, enabling organizations to monitor, measure and manage their business metrics against strategic and operational objectives throughout the organization.

Align strategy with operations

- Track performance against key performance indicators (KPIs) to link corporate strategy to operational tactics.
- Set quantifiable goals for any time horizon and use scorecards to monitor progress on specific projects and activities.
- Create strategy maps, impact diagrams, and other elements of the Balanced Scorecard.
- Maintain metrics in a centralized data store to ensure consistent definitions.

Communicate strategy and track your progress

• Visually capture organizational strategy to help departments and employees set priorities.

- Use status indicators and plan-versus-actual data to reveal progress against targets.
- Access business intelligence reports and other content from within the scorecarding environment to see details and context.
- Use menus to define threshold ranges, benchmarks, data source definitions, contact names and URLs.

Ensure accountability for performance

- Assign a primary owner for every metric to ensure greater accountability.
- Organize and view scorecards by status to quickly identify problem areas and focus on high-priority objectives.
- Set alerts to stay aware of changes in the status of metrics.
- Assign actions against metrics to apply corrective actions to poorly performing business areas.

Share with more user communities

- Populate metrics in any language, then display in the user's preferred language.
- Monitor performance of business units, operating subsidiaries and geographic regions to quickly identify areas that need attention.
- Gain quick access through a single sign-on dialog box.
- Leverage scorecard information in dashboards and portals to access and communicate scorecard content and encourage adoption throughout the organization.

Enjoy simple deployment and administration

- Create metrics, process diagrams and scorecards once and then share them across the organization.
- Integrate cross-functional data from virtually any source.
- Use intuitive wizards to guide you through the design process and reduce the time spent in scorecard maintenance and updates.
- Benefit from a zero-footprint, Web-based deployment model, which reduces the administrative burden while encouraging user adoption.

IBM Cognos Mobile

IBM Cognos Mobile provides timely and convenient access to IBM Cognos Business Intelligence information from a mobile device. This provides decision makers with access to business-critical information wherever they are and whenever they need it.

Framework Manager models

Databases are typically designed to store data captured through business processes. The stored data is not easily accessible for reporting and analysis to make enterprise decisions in business terms. Because of this, data requires metadata, the 'data about data', so that it can be effectively retrieved for analysis and reporting. The Cognos Framework Manager (FM) tool allows you to redefine the data in the database to answer business questions.

Cognos is designed to deliver centralized metadata via the FM model. The model provides a common definition of data in business terms that add value across the organization. The database is redefined so that you can publish metadata in a package and make it available through the Cognos Connection to the Cognos BI reporting tools Report Studio, Query Studio, and Analysis Studio to answer business questions.

The Framework Manager model presents the data using business terms and definitions. This enables you to use, build, and modify your own reports and enables consistent understanding and use of data and metrics across your institution. The logical relationships between data are defined within the model to enable complete data integration so that you spend less time gathering and organizing data.

For more information about data modeling, see the "Framework Manager User Guide" or "Metric Designer User Guide". You can find them by searching the IBM Cognos Business Intelligence information center.

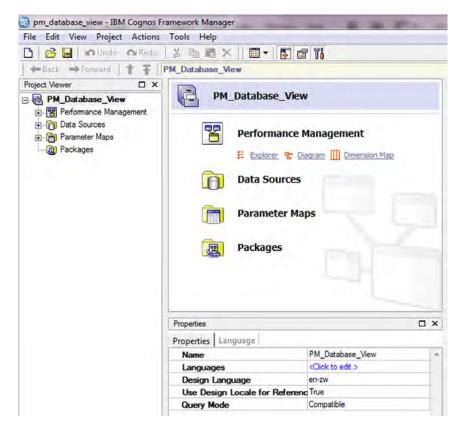
Framework Durable models

The models delivered with your Performance product are Durable Models. A durable model enables you to make necessary changes to the published packages and corresponding content in the Content Store of the Framework Manager model without impacting existing reports, report authors, and end users. This section describes how to make your customized FM models Durable.

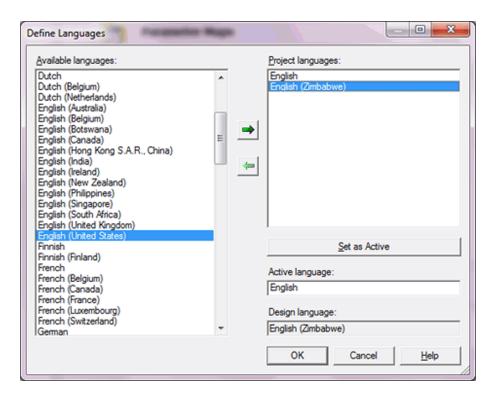


Make these changes to pm_database_view.cpf first, as this is the segmented model for all PM specific models.

- 1. Add the design language if the model does not already have it.
 - 1.1. Select <Click to edit> in the 'Languages' column under the 'Properties' tab to open the 'Define Languages' popup.



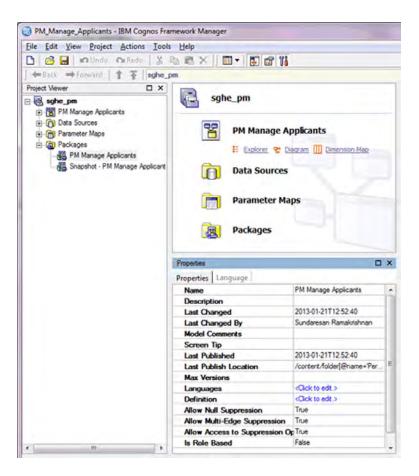
- In the 'Define Languages' popup, select 'English (Zimbabwe)' as the design language, and click on the green right arrow to add it to 'Project languages'.
- **1.3.** Click **OK**.



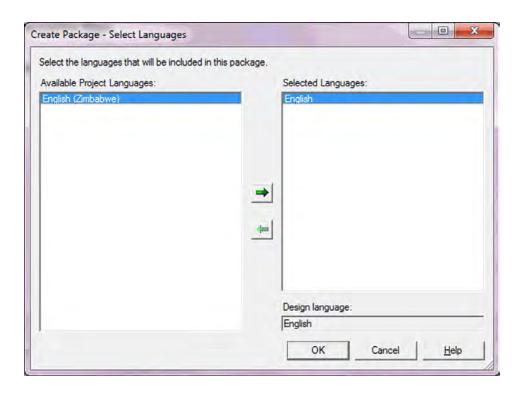
- **1.4.** Click **OK** in the resulting 'pm_database_view IBM Cognos Framework Manager' popup window.
- 2. Make these changes to the languages of all the packages based on the model as shown in the following screen shots. Save and close the model.



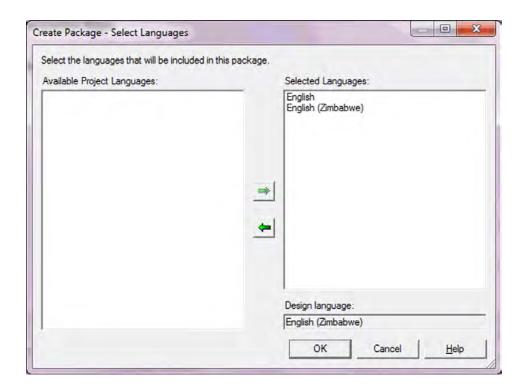
This is applicable only for PM specific models and not pm_database_view.cpf.



3. Select English (Zimbabwe) from the left pane of the 'Create Package - Select Languages'.



4. Click the green right-facing arrow to add 'English (Zimbabwe) to the list of Selected Languages.



5. Using an XML or text editor, open the model.xml file and near the top of the file, change the language value from 'en' to 'en-zw' as shown here:

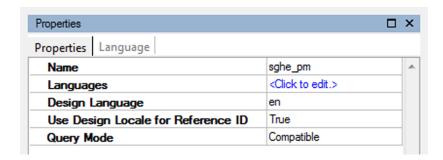
Original code:

<defaultLocale>en</defaultLocale>

Change language as shown:

<defaultLocale>en-zw</defaultLocale>

6. Under project level 'Properties', set the value of 'Use Design Locale for Reference ID' to **True**.



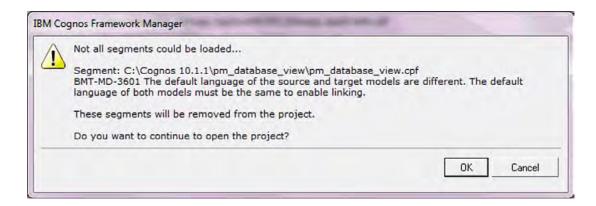
Once a model is made durable, packages based on the model will need to be re-published and existing content checked for durability. The models are segmented and have links from business view(s) to database view. After you make the pm_database_view.cpf as a durable model, follow the steps given below to convert the packages to the Durable model:

1. Open PM specific model.

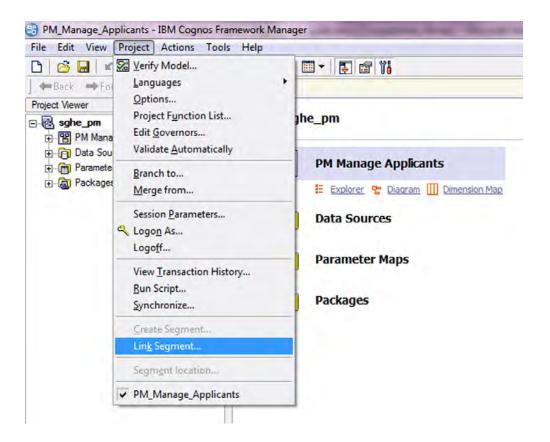


The images shown in these steps are of the PM MANAGE APPLICANTS.cpf file

2. Select **OK** to any warnings and repeat steps 1 to 4 from above for all the models.



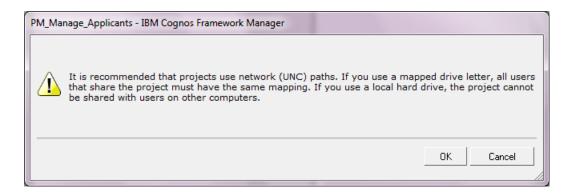
- **3.** Add the segmented model (link pm_database_view.cpf model) to all the PM specific models as shown below:
 - **3.1.** Select **Project > Link Segment** from the main menu options.



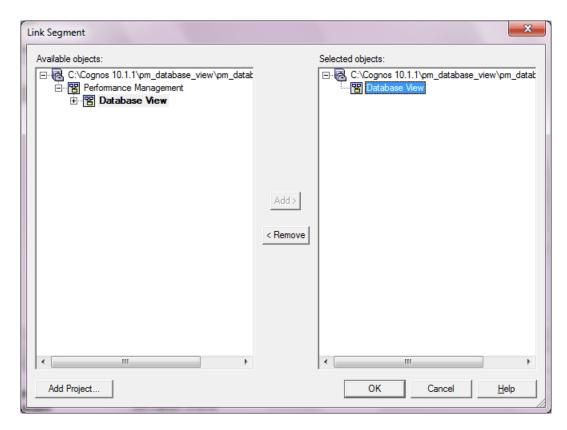
3.2. Browse to the location of pm_database_view.cpf file. Select and open the file.



3.3. Click OK when prompted to use network (UNC) paths.



- **3.4.** In the 'Link Segment' window, select **Database View**.
- **3.5.** Click the **Add** > button to include Database View in the 'Selected objects' list.



3.6. Click **OK**.

Now your Framework Manager model is a durable model.

Metadata layers

Cognos Framework Manager provides the ability to layer metadata as a means to insulate end users from changes made to the underlying data sources and the defined data relationships within the database. When changes to an existing model are required, Framework Manager can identify the impact to existing reports. This enables your institution to manage model changes without having to rewrite reports.

The delivered FM models use two layers to manage the metadata content: the database view and the business view. A third layer, the presentation layer, is used to publish the data in logical groupings.

Database view metadata layer

The database view metadata layer is the layer into which Framework Manager imports all database objects.

There is very little difference between the database view and the database itself. The only differences are the following:

- Object names for columns that are eventually published from subsequent layers include a business name using mixed-case nomenclature and no underscores.
- Some calculated columns make commonly used functions more readily available.
 They generate a unique key for specific fact tables, and provide the flexibility to
 configure institution-specific descriptions for certain concepts using parameter
 maps.

Business view metadata layer

The business view metadata layer organizes content around a specific business process or processes. The business view layer references objects from the database view and relationships among them are defined to support the associated business process.

The content defined within the business view is as follows:

- The warehouse business concepts define the relationships between the fact and dimension tables. These joins define the SQL generated behind the scenes by the various Cognos BI Reporting Tools.
- Determinants are defined for the various dimensions to ensure that the proper cardinality is preserved with multi-fact queries that have a conformed, or shared, dimension.
- Role-based, or 'alias', query subjects are defined for those objects that serve multiple business purposes. An example of one such object would be 'Application Date' which is a copy of the 'Calendar Date' query subject. These role-based query subjects allow an object to be utilized multiple times within the same query for different purposes.

Presentation view metadata layer

The presentation view metadata layer is the layer in which information is reorganized into useful logical groups of data that you can use together for reporting. The query subjects in the presentation layer include data elements and folders of data elements that present the data in an intuitive fashion so it is easy for you to locate desired data for any report.

The following standards were applied when creating the presentation layer:

- Related data or query items are grouped in the same query subject.
- Subsets of data that are typically used together are organized into folders.

- Commonly used filters are defined to enhance functionality. Examples of delivered filters include Student Level Undergraduate, Student Level Graduate, and Student Level Professional.
- Commonly used calculations have been added to make reporting easier.
- Additional range and aging concepts have been added that work in conjunction
 with parameter maps. Each has an accompanying 'order' concept to ensure they
 appear in proper order when you use them.

From the presentation layer you can publish a complete package of all the data in that presentation view and or a number of smaller packages of information that target specific types of analysis and users. These packages allow you to create and use dashboards, run reports, build ad hoc reports, and analyze trends without the need to sift through large amounts of unneeded information.

Cognos and BPRA Meta Data Integration

Banner ODS includes Cognos Framework Manager (FM) models and packages for the ODS Reporting Views organized in groupings called business concepts. SRP includes Cognos Framework Manager models and packages, and Transformer cubes.

The Performance products - Banner Recruiting and Admissions Performance, Banner Student Retention Performance, and Advancement Analytics for Cognos - include Cognos Framework Manager models and packages and Transformer cubes. The products also include a variety of reports, performance charts, dashboards, and scorecard samples and the supporting Metric Studio/Metric Manager content using the Cognos BI tools.

The layers of Cognos content relate to the underlying warehouse data structures that include the reporting views and the SRP fact and dimension tables. The bulk of the data dictionary that describes these data structures is defined as BPRA Meta Data that is stored in the "IA-Admin Meta Data", (IAMD) and is delivered with each BPRA product.

The BPRA Meta Data includes column level "business definitions" that describe the data and is stored for each target column along with its source system, table, and column. Another key part of the BPRA Meta Data is the mapping from one layer to the next. For a given SRP column, which Banner ODS column it comes from, and in turn, which Banner (source) column that ODS column is sourced from. (This mapping information is hereafter referred to as "lineage".)

To provide a meaningful relationship between the BPRA Meta Data information and the Cognos reporting tools, the BPRA Meta Data is integrated with the Cognos tools. The Meta Data business definition and lineage information are delivered in the FM models and packages and displayed in the Cognos reporting tools (Query Studio, Report Studio, and Analysis Studio). Within each query item in the FM models, the Description field includes the business definition and lineage, while the ScreenTip field includes the EDW source column name.

View BPRA Meta Data in Cognos

To view the business definition and lineage for a query item, use the arrows at the bottom of the navigation window to open the information for the selected query item. See examples of BPRA Meta Data displayed in Query Studio and Report Studio as illustrated in the following figures.

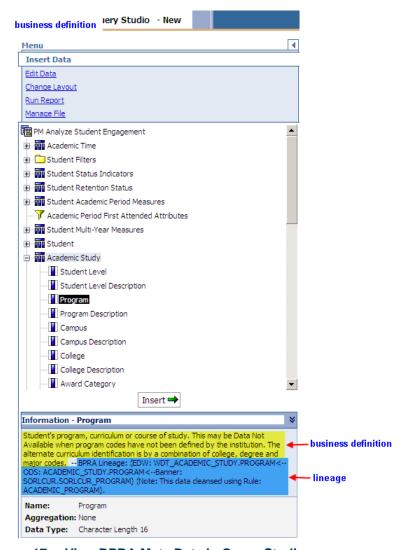


Figure 17: View BPRA Meta Data in Query Studio

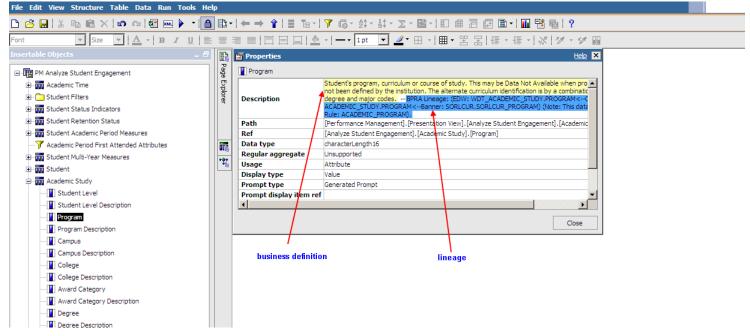


Figure 18: View BPRA Meta Data in Report Studio

View BPRA Meta Data details

If you are using Cognos 8.4 or higher, you can also view more detailed information in both Query Studio and Report Studio. Right-click a query item and select the Lineage option to view the Database and Technical information displayed in Query Studio and Report Studio as illustrated in the following figures.

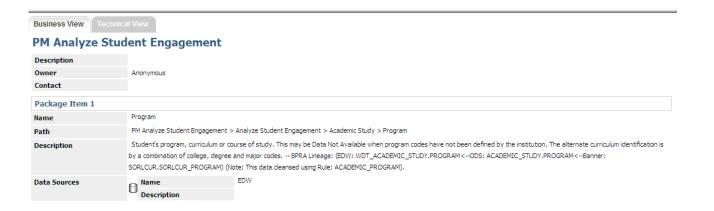


Figure 19: View Database and Technical BPRA Meta Data in Query Studio

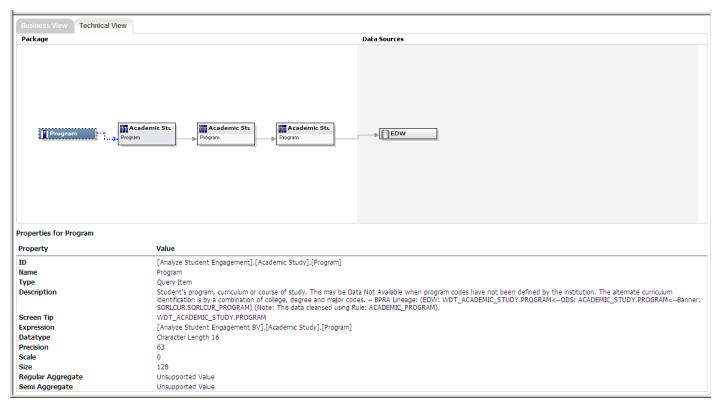


Figure 20: View Database and Technical BPRA Meta Data in Report Studio

🕒 💪 🔛 In Undo 🙉 Redo 🐰 📭 🏗 🗶 📗 🖷 🏋 ←Back →Forward | ↑ → sghe_pm Project Viewer □× 🖶 濖 Analyze Student Engagement Properties Language Multi Source Academic Time Name AM<-ODS: ACADEMIC STUDY. F Student Filters 2011-03-20T14-00-42 Student Status Indicators Last Changed Last Changed By + 500 Student Retention Status Student Academic Period Measures Model Con WDT_ACADEMIC_STUDY.PROGRAM Screen Tip operty Editor – Descripti × Academic Period First Attended Attribute Student Multi-Year Measures Expression Click to edit Studen's program, curriculum or course of study. This may be Data Not Available when program codes have not been defined by the institution. The alternate curriculum dentification is by a combination of college, degree and major codes. - BPRA Lineage (EDW: WDT _ACADEMIC_STUDY_PROGRAM<-DOS. ACADEMIC_STUDY_PROGRAM<-Bramer: SDRILCURS_DRICLURS_PROGRAM) (Note: This data cleansed using Rule: ACADEMIC_PROGRAM). Student Is Hidden Δttribute Usage Academic Study Student Level Formal <Click to edit.: Currency Student Level Description Program Data Type Character Length 16 Precision Program Description Campus Scale 128 Campus Description Size Is Nullable College College Description Display Type Value Cancel MIME Type M Award Category Award Category Description Prompt Info Regular Aggregate Unsupported Degree Semi-Aggregate Is Unsortable Unsupported Degree Description Major Major Description Program Classification Program Classification Description Second Major Information Student Enrollment

The BPRA Meta Data business definition and lineage are stored in the FM model query item Description as illustrated in the following picture.

Figure 21: BPRA Meta Data Information in Framework Manager

The SRP source table and column are also stored in the FM model query item Screen Tip, which will be displayed when you move the cursor over a query item in either the Cognos Query Studio or Report Studio reporting tool.

Packages

Academic Performance

A package is a subset of data designed to support a specific set of reporting needs. Packages may contain content designed within Framework Manager or cubes generated using the Cognos Transformer tool. They are the means by which Query Studio, Report Studio, and Analysis Studio are able to access data using the Cognos BI reporting tools. They are essentially the data sources used for reporting and analysis.

Within the various Cognos studios you can report against only one package at a time. It is important to use the correct package for the intended business purpose. When creating a new report, you are prompted to select which package to use.

Filters

Filtering capabilities simplify and enhance reporting. When using the reporting tool metadata to write a report, you can apply a filter on any columns of the report so that specific report will retrieve a subset of the data in the database.

There are multiple ways to add filters to the metadata layer. One way is to add a query item to the metadata that will filter a subset of data that is used on a regular basis. This type of filter is referred to as a stand-alone or pre-defined filter. A stand-alone filter can be included in multiple data model packages. For example, the time filter "Student Level Undergraduate" is included in several packages. The filter definition is the same across all packages that include it. When you place a stand-alone filter on a report, the report will select only the data defined with that filter.

Another way to define a filter is to apply it to an entire set of data, like a query subject in the Cognos FM Model. When there is a need to define a a subset of data by one of the attributes, a role based or alias query subject is defined. This type of filter would have the specific restriction embedded in the filter query item.

The Banner ODS and the data warehouse includes both types of filters. Your institution can define additional filters of either type within the Framework Manager tool to meet your specific reporting requirements.

Banner EDW Filters

Filter Type	Example
Embedded	Secondary School Post Secondary School
Stand-alone	Student Undergraduate Level Student Level Graduate Student Level Professional Highest Test Score Latest Test Score

Functionality

Filter	Data Elements
ACT Composite Test (filter)	ACT Composite Test
SAT Combined Test (filter)	SAT Combined Test
Student Level Undergraduate (filter)	Student Level Undergraduate
Student Level Graduate (filter)	Student Level Graduate
Student Level Professional (filter)	Student Level Professional

Preselected Records of Interest

For some business areas, it is useful to represent certain records of interest along with the entirety of records. Concepts such as 'First Contact', 'Latest Contact', and 'Highest Test Score' are typically of interest. It, therefore, is desirable to make such items easily available within the presentation view. To support this functionality, such concepts have been included in various query subjects where deemed to be useful.

An example of this can be found within the Contact query subject. Information relative to all contacts is included as well as content associated with the first contact and the latest contact.

Indicators

Some query subjects within the presentation layer include indicator fields. Dependent upon the database source for a given data element, the indicator is translated to a meaningful 'Yes' or 'No' representation. For those data elements drawn from dimension tables within the warehouse, indicator fields are translated via cleansing during ETL processing.

For those data elements drawn from fact tables, however, the indicator descriptions remain as either a 1 or 0. Two Parameter Map parameters, defined within the Administrative User Interface, define the 'Yes' and 'No' description values for indicators based on fact table data. Refer to the sections *Negative Indicators* (0) parameter map and Positive Indicators (1) parameter map for more information about them.

Derived Concepts

In some business cases it is important to associate certain values together for reporting purposes that may not otherwise have an association in the database. To address this need derived concepts have been created that utilize parameter maps to define how values translate to the new data element.

For example, the Traditional Student Ind is based on the prospective student's Admit Age as of the start date for the Academic Period in context, to determine if the prospective student should be classified as a traditional or non-traditional student at the time of their admission defined within a parameter map.

Predefined Value Concepts

There are specific data elements that are commonly used but may have different codes from client to client. For these situations, you should have a predefined element that could be driven off a parameter map to provide a standardized structure within the presentation layer. Elements such as this have been added to the presentation layer.

An example of this is the Test query subject. Analysis of undergraduate applicants typically centers on test scores such as the ACT Composite and the SAT Combined. The codes within the database, however, may vary from institution to institution. A parameter has been defined to allow these codes to be translated so that they are standardized and meaningful.

Distinct Counts

One measure often used for analysis within higher education is unduplicated headcount. This concept, as well as other unduplicated counts, can be a bit complex to create in a report because one needs to have a true understanding of what the uniqueness of a record truly is. Various counts have been added throughout the presentation layer to eliminate any such confusion and to ensure a "single version of the truth" for these measures.

Headcount is a primary example of this concept which is included in the presentation layer. An additional example would be counts based upon the set of financial aid steps a person may have completed within the Financial Aid Status query subject. A distinct count is calculated for each indicator based upon whether they have a "Yes" value.

Special Calculations

Special calculations are frequently required based upon various measures already represented in the presentation layer. Some of these useful calculations have been included in their own folders seen at the bottom of available components in the presentation layer. Examples of such calculations would be the various calculations provided with the Analyze Student Progress business concept which provides Course rates found in a folder within the Student Course query subject.

Internal Keys

Unique identifiers for people or records may be required in certain situations within Cognos when performing more complex analysis. For this reason, an additional query subject has been included within each business concept to house these unique identifiers. These values are useful when joining queries within Report Studio and when identifying distinct headcounts or applications counts within a cube model.

Cognos Security Integration

Cognos Authorization and fine-grained access

In a security context, authorization refers to permissions or defining "who can see what." Cognos provides a complete infrastructure to define rules regarding "object" permissions (the ability to see folders or reports) as well as "data" permissions (which rows or columns of data individual users or groups are permitted to see). Cognos picks up its list of users and groups from the authentication providers defined at a given site, and maintains its own list of data permissions internally.

Data permissions can also be defined within the Banner Performance Reporting and Analytics (BPRA) database using the Fine-Grained Access (FGA) facility which allows for centralized maintenance of those rules for any non-Cognos based access as well. A typical Cognos configuration uses a single database connection (using a single Oracle username and password) for the BPRA database which does not allow for use of the BPRA FGA feature. However, it is also possible to configure Cognos to use multiple database connections, which then use the BPRA Fine-Grained Access rules.

Cognos and BPRA authorization

Authorization enables you to create logins so that each user can access the same data source while still allowing them to use the fine-grained access rules already defined for them in the Administrative User Interface. Authorization could be used to set up more general Oracle users whose associated fine-grained access rules might apply to a type of report writer instead of a single person. Multiple Cognos users or roles could then be set up to secure the actual Cognos content (reports, dashboards, etc.), and then matched with data source signons which would provide the means to secure the actual data contained in the database.

For existing users, you would remove or disable the extra users so that as each user performs a query, their fine-grained access rules would be used. This should be done because their signon would be using their actual Oracle username to access the database.

- 1. Open Cognos Connection.
- 2. Click Launch.

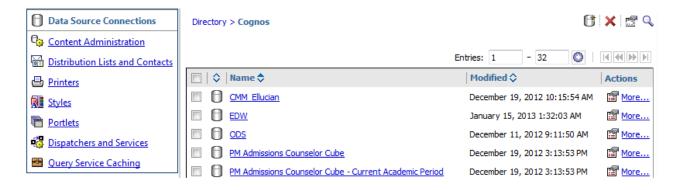


- 3. Click Cognos Administration.
- 4. Click the **Configuration** tab.

The named data source connections display. The connections provide detailed connectivity information as to where to retrieve data.

5. Click one of the data sources to view the possible servers on which source data may reside.

In the screen samples, we have chosen the warehouse data source. By default, the defined server connection has the same name as the data source connection. (See the navigation bread crumbs at the top of the screen.)



6. Navigate to the next layer of detail to define what users connect to this data source.

Again, as with the server connection name, the user connection name is inherited by the data source connection unless otherwise specified.

7. Click the **Set Properties** icon in the Actions column.



8. Click the **Signon** tab.



9. Click the **Edit the signon...** link to view or change the Oracle username and password for this connection.



In this case you'll see the warehouse data source connection defined with a username of EDWMGR, which would have access to all data.

Let's say, for example, that your institution has two Cognos users: John Doe and Bob Smith. You would like to make use of the Oracle fine-grained access (FGA) rules that are already defined for these two users in your Administrative User Interface. Accomplishing this is a simple matter of defining two different logins to the warehouse data source that is proprietary to each user.

- **10.** To create a new connection for the warehouse data source, return to the user connection screen within the Cognos Administration.
- 11. Click the **New Signon** icon.



- 12. Create a signon for John Doe and call the signon "JDOE".
- 13. Click Next.

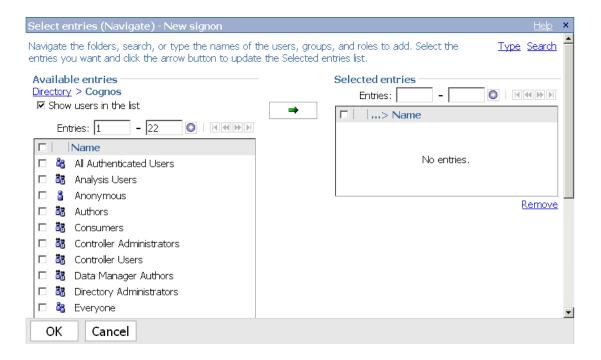
You are prompted for the Oracle username and password that will be used for this signon.



14. Enter the information, then click **Next**.

You are prompted for which Cognos users can access this signon.

- **15.** Add JDOE to the list of users able to use this signon.
- **16.** Click **OK**.



17. Click Finish.

You'll see that now there is a second signon for the warehouse data source.

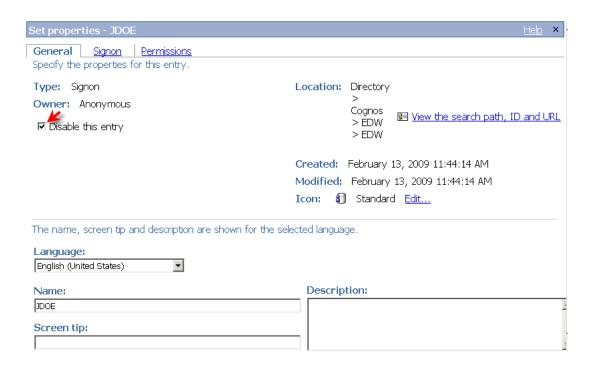
18. Repeat the above steps for Bob Smith.

You will view three distinct signons for the warehouse.



At this point, if you logged in as John Doe, and ran a query within Cognos, you would be prompted for what signon to use. (John or Bob) This would not be an ideal situation, because you would be prompted for which connection to use each time you accessed Cognos, and the warehouse signon is not FGA secured. You, therefore, would want to remove John or Bob's access to the warehouse signon, delete the signon, or disable it.

How to view or change what users have access to a signon was detailed previously. Deleting a signon is a straight forward activity. You select a signon and delete it. Disabling a signon is most likely the preferred method so that the overall warehouse signon is retained, but simply not active. This is a simple matter of checking the **Disable this entry** check box within the general properties of the signon.



Once this signon is disabled, the signons John and Bob will be the only two active signons. Therefore, if John Doe now signs into Cognos and performs a query, he will no longer be prompted to choose a signon (because he does not have permission to use the Bob signon) and his FGA rules would be enforced on his query because his signon is using his actual Oracle username of JDOE to access the database. Similarly, if Bob Smith signs into Cognos and performs a query, his FGA rules will be enforced because his signon is using his Oracle username of BSMITH.

To put this into more practical application, one might set up more general Oracle users within the data warehouse whose associated FGA rules might apply more broadly to a type of report writer as opposed to a single person. Multiple Cognos users or roles could then be set up to secure the actual Cognos content (reports, dashboards, etc.), and matched with data source signons which would provide the means to secure the actual data contained in the database.

For additional detailed information on Cognos security, see the *Cognos Administration* and *Security Guide*.

Luminis authentication (single sign-on)

Authentication is the process of logging into a secured application. This section describes integrating Authentication considerations when using Cognos BI with BPRA solutions using the Luminis portal.

Usually Luminis and Cognos are configured to require users to enter a username and password to access their content. And usually, these credentials are stored and maintained separately. This requires users to log in once for Luminis and then again for Cognos every

time you use Cognos within the Luminis Portal. However, this dual log-in problem can be avoided by configuring Luminis to perform Single Signon (SSO) into Cognos. Luminis provides various techniques to accomplish SSO with external applications, but the simplest is their Generic Connector Framework (GCF). (This is documented extensively in the Luminis SDK / Generic Connector Framework Implementation Guide), but basically what happens after setting up a GCF is this:

- The user sees a Cognos BI link in a Luminis page and clicks it.
- The first time a user clicks a Cognos link within Luminis they are prompted for their Cognos username/password.
- Luminis passes that through to Cognos. If it authenticates, Luminis redirects that link to the appropriate Cognos page.
- Luminis also stores that Cognos username/password, so that for future attempts, the user doesn't have to enter anything. Luminis automatically passes through the username/password and authenticates the user for them.

An important consideration regarding Cognos security is that, unlike other applications, Cognos does not have its own security infrastructure. That is, it does not have its own "user store" (where it stores usernames/passwords). Instead, it interfaces with standard security providers (such as LDAP, NTLM, Windows Active Directory, etc.) so that users can re-use existing security setups without having to duplicate them. This is fully documented in the Cognos Setup/Install documentation, as well as various other Cognos extensibility documents. So this provides an opportunity to re-use an existing user store, so that clients only have to enter/remember a single username/password.

Combining reusing an existing user store for Cognos authentication with the Luminis GCF construct simplifies SSO because users can re-use existing usernames/passwords and (after an initial Luminis session) not have to re-enter credentials to access Cognos from Luminis. The only exception to this is when their password changes. They will have to re-enter it in Luminis once.

Luminis also supports different user stores as well. By default, Luminis uses its default LDAP implementation (the SunOne Directory server) as the location where it stores security credentials, but it can also be configured to use other external systems (such as Windows Domain, or other LDAP implementations). This flexibility regarding authentication storage between Luminis and Cognos provides the client the ability to centralize their authentication processes, which can further help with the SSO process.

Determining where to store security credentials is a client-specific choice, but for SSO illustration purposes, this documentation describes how to implement that using the default Luminis LDAP implementation. Some of the concepts are applicable to other configurations as well and are noted.

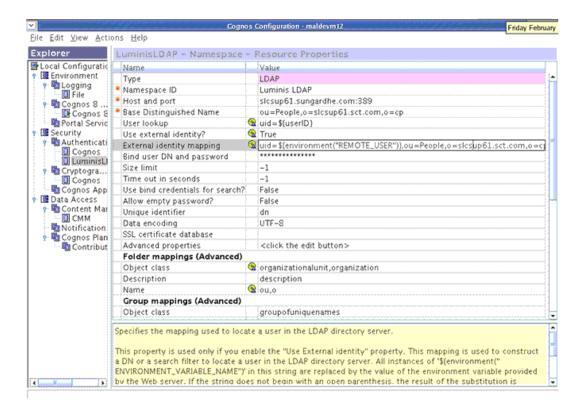
Setting up Luminis single sign-on to Cognos using Luminis LDAP authentication

These steps were written for Cognos Business Intelligence 8.3 and Luminis 4.0.2. Later releases may follow the same steps. Refer to the release-specific versions of each product's associated documentation for more details.

All sample configuration files referenced can be found in the luminis sso folder, under the ods\reports\cognos_8 folder in the ODS source tree.

In Cognos:

1. Configure an LDAP authentication namespace in Cognos to point to the Luminis LDAP instance. The properties page for the new namespace should look similar to the screen capture:



The majority of the default settings for an LDAP namespace can be retained with the following exceptions (as noted in the screen above, either with a red asterisk or a yellow circle icon):

NameValue

Property Name	Property Value
Namespace ID	A unique name for the namespace - can be whatever you choose
Host and port	Needs to point to the Luminis machine and LDAP listener port
Base Distinguished Name	Ou=People, o= <machine>,o=cp</machine>
User lookup	uid=\$(userID)
Use external identity?	True
External identity mapping	uid=\${environment("REMOTE_USER")},ou=People, o= <machine>,o=cp</machine>
Bind user DN and password	user="cn=Directory Manager" password= <luminis ldap="" pw=""></luminis>

Under folder mappings (advanced):

Property Names	Property Value
Object Class	organizationalunit, organization
Name	ou,o

- **2.** Once configured, disable the Anonymous Login property in the default Cognos namespace. (Your Cognos content now requires login.)
- 3. Place a copy of the Luminis pickup.html file in the document root location of the Cognos web/application server, where it can be accessed from the Luminis machine.

In Luminis:

1. Place a copy of the cognos.xml, cognos.properties and cognos.config files from the distribution in the GCF connector configuration folder, specifically:

Luminis IV

\$CP_ROOT/webapps/cpipconnector/WEB-INF/config

Luminis III

\$CP_ROOT/products/sso(or gcf)/config

2. Edit the cognos.properties file and update the values of the following fields to represent your Cognos installation:

Field	Description
cognos.externalSystem URL	Point to the main URL for your Cognos environment.
cognos.pickup.remoteur 1	Point to the copy of the file you placed in the Cognos environment in step 3 of the previous section.

3. Edit the cognos.properties file only if Cognos and Luminis are not authenticating to the same LDAP to allow the credentials to be entered the first time a person selects the link:

```
\begin{tabular}{ll} cognos.cpipconnector.getconfig.createonlogin &= 0 \\ cognos.cpipconnector.getconfig.usePDSCredentia &= false \\ ls &= 0 \\ \end{tabular}
```

4. Edit the cognos.config file and make sure the property:

```
es.cognos.configURL
```

points to your Luminis installation.

- **5.** Edit the cpipconnector.properties file and append cognos.properties to the end of the property.files line toward the top of the file.
- **6.** Perform the following configuration. Import the configuration parameters within cognos.config into the Luminis configuration:

```
configman -i cognos.config
```

7. Alter the es. systems parameter to include the cognos connector:

```
configman -g es.systems This gets the current list of connectors
configman -s es.systems "<current list> cognos"
```

- **8.** Restart Luminis to reload the cache with the new configuration values.
- **9.** Build a channel using a portal admin account and the following URL:

```
http://<Site Luminis Server>/cp/ip/
login?sys=cognos&url=${urlPass}
or
```

refer to the next section "Cognos channels in Luminis" on page 8-35.

10. Once these changes have been made, restart Luminis, or at least the cpipconnector service.

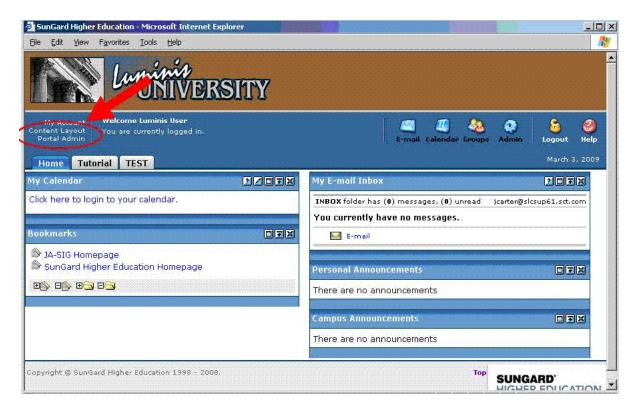
This explains how to configure Luminis and Cognos to share a username/password using Luminis's LDAP implementation. However, both Luminis and Cognos can be configured to use other authentication sources, even potentially different ones. When they are configured to use the same source, then the password information can be maintained in a single place. If they point to different sources, Luminis can store the username/password information and then it can be configured to prompt the user to re-enter the password whenever it changes.

For more information on configuring a Luminis GCF implementation, refer to the Luminis SDK / Generic Connector Framework Implementation Guide.

You can also find more information about configuring Cognos security in the *Cognos Configuration and Installation Guide*.

Cognos channels in Luminis

Once SSO has been established, you can create links to Cognos within Luminis. Typically, this is accomplished using channels within the Luminis tabs. This process is documented in the "Luminis SDK/Channel Developer Guide". The end result is to be able to display Cognos content within Luminis, such as in the example screen below:



The simplest way to set up the links is using CPIP Inline Frames, which can then be defined for an entire tab, or as a column (portion) of a specific tab. These tabs can then be associated with a Luminis fragment definition, which can then be rolled out to specific Luminis users, or audiences (based on Luminis role). The key is to define which Cognos content should be displayed within a channel. That is done by capturing the actual URL used to access the Cognos content, and defining that in the cognos.xml file as a variable, which can then be referenced in the Luminis channel definition URL.

For example, consider the following URL definition that is delivered in the cognos.xml file delivered (in the luminis sso folder in the data store source tree):

```
<SET a:symbol="urlPass" a:value=
"${properties.externalSystemURL}/${properties.cognosSystemID}/
cgi-bin/cognos.cgi?b_action=xts.run&amp;m=portal/
cc.xts&amp;qohome=&amp;ui=" />
```

This defines a CPIP variable called urlPass which points to the base Cognos URL for Cognos Connection viewer.



Notice the use of the es.externalSystemURL and es.cognosSystemID variables, which are defined in the properties file for the cognos CPIP definition. This convention allows you to parameterize commonly used portions of URL definitions.

Also notice the conversion of all ampersand characters to the URL-encoding equivalent. This is required for proper parsing of the URL in the XML syntax.

This variable "urlPass" can now be used when referencing Cognos via a Luminis channel definition, as per:

```
http://<Site Luminis Server>/cp/ip/
login?sys=cognos&url=${urlPass}
```

which points to the Cognos Connection viewer (based on the definition of urlPass). By defining CPIP variables in the XML file to point to the desired Cognos reports/pages you wish to expose in Luminis, you can then create Luminis channels using those variables.

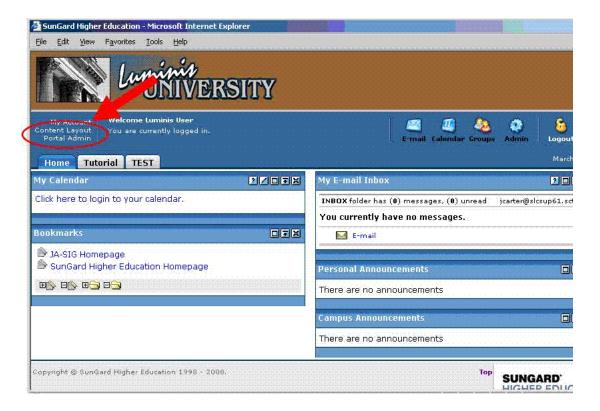
A series of example Cognos URLs are delivered as variables in the cognos.xml file (urlPass, cogURL1, cogURL2, cogDash1 - cogDash4). These demonstrate the ability to define various Cognos content (reports) that can be viewed specifically using a Luminis channel, and these can be modified/updated/deleted as needed. Note that these URL values need to be URL-encoded when they are stored in the XML file for proper parsing by Luminis.

Setting up Cognos channels in Luminis

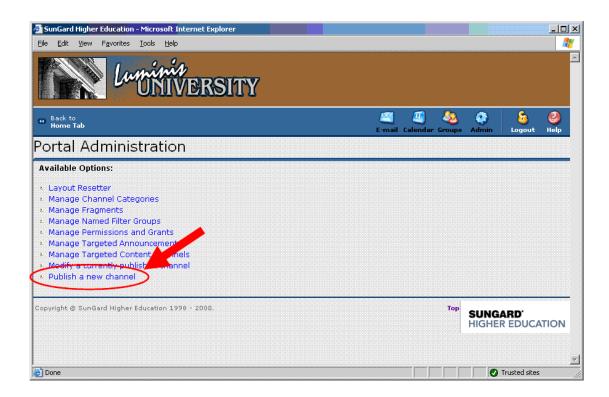
Now we will use all the pieces of what we have defined so far to create a basic Luminis channel to display the standard Cognos Connection viewer application. To start, assume a

new user is defined in Luminis (who has Luminis Administrative privileges, in order to administer the portal and content layout).

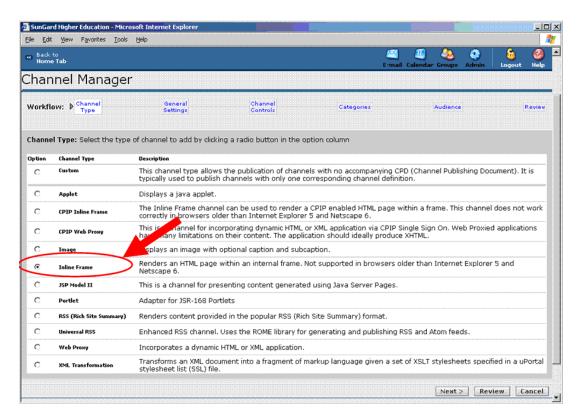
1. Click the **Portal Admin** link to define the channel.



2. Select Publish a new channel.



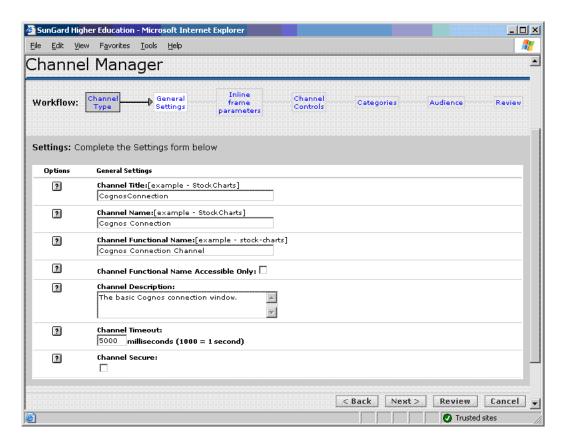
3. Select **Inline Frame** as the Channel type.



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4. Click Next

5. Enter the title, names, and description information for the channel.

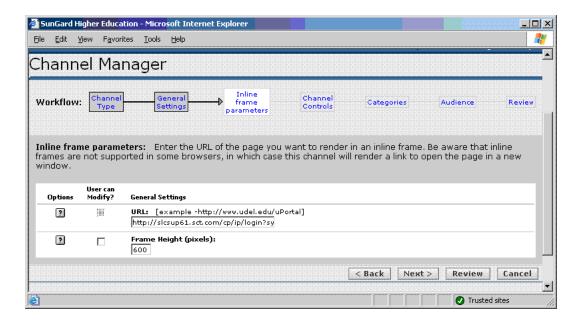


6. Click Next.

7. Enter the URL for this channel, which is the CPIP definition described earlier:

```
http://<Site Luminis Server>/cp/ip/
login?sys=cognos&url=${urlPass}
```

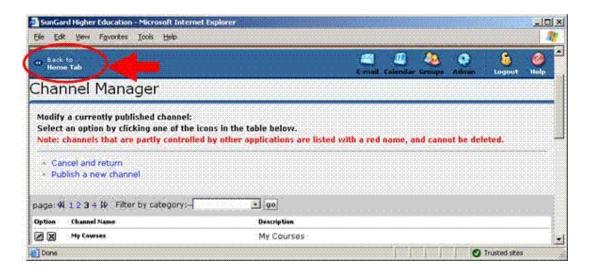
Include the CPIP variable "urlPass" which points to the desired Cognos content.



- 8. Click Next.
- 9. Click **Next** to accept the default values for Channel Controls.
- **10.** Select a category (or categories) for the channel to be associated with.
- 11. Click Next.

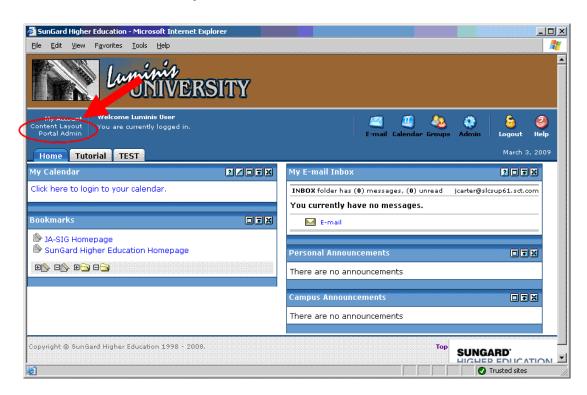
(The category is used to locate channels when searching for them later)

- **12.** Click **Next** to accept the default values for Audience.
- **13.** Click **Finished** to publish this channel.
- **14.** Click the **Back to Home Tab** link in the upper left-hand side of the screen to return to the main Luminis page.

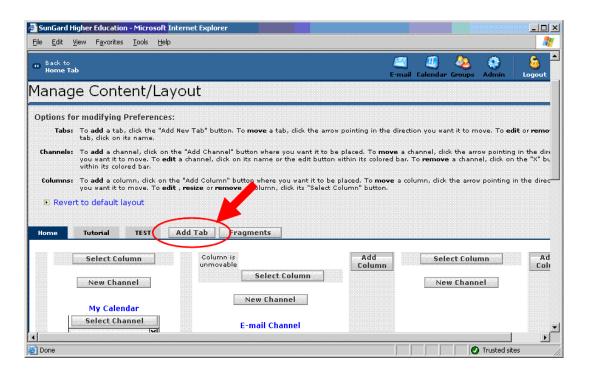


The next step is to associate this channel with a tab on the portal.

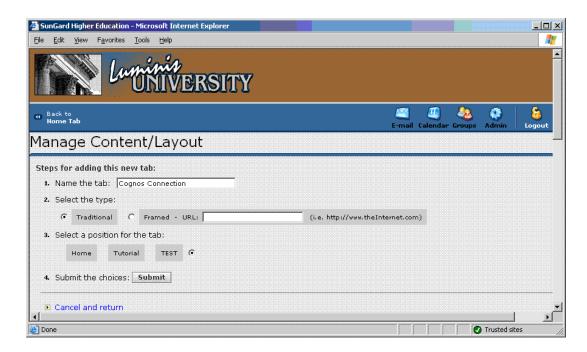
15. Click the Content Layout link



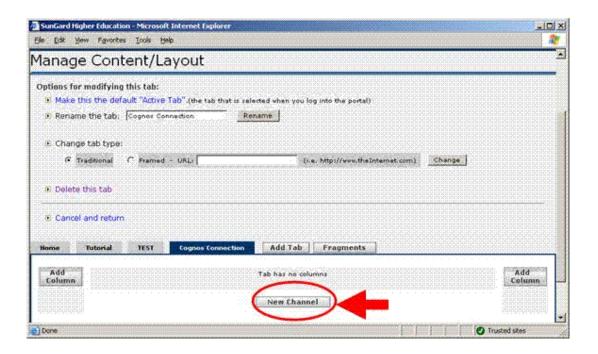
16. Click the **Add Tab** button to create a new tab.



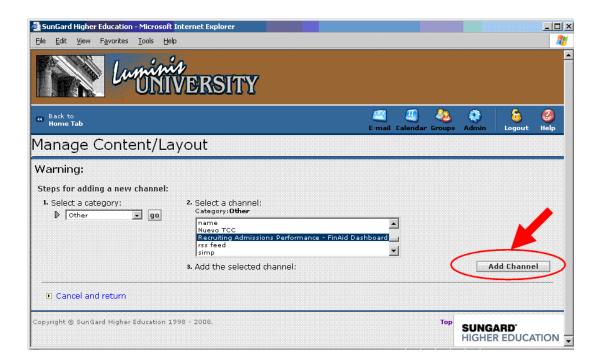
- 17. Enter the name for this Tab as Cognos Connection.
- 18. Click Submit.



- **19.** Select the new Cognos Connection tab.
- **20.** Click the **New Channel** button:

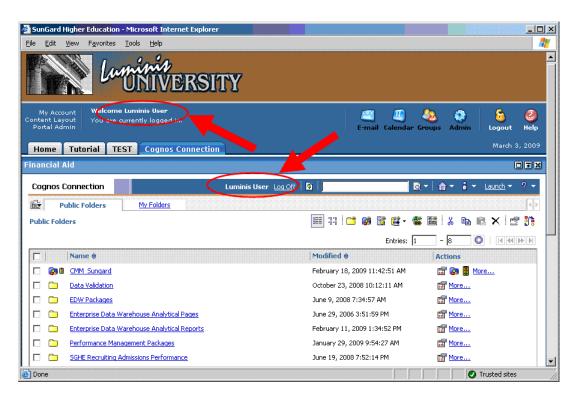


- 21. Select the channel by first entering the category (or Select All)
- 22. Click Go.
- **23.** Select the channel from the listbox.
- 24. Click Add Channel:



- **25.** Click the **Back to Home Tab** link to return to the main Luminis page,
- **26.** Click the new **Cognos Connection** tab to see the new channel.

You will see the authenticated user in both Luminis and Cognos, with the name coming from the common user store (Luminis LDAP):



Following the same basic process, any Cognos pages can be deployed within Luminis, such as in the example screen below:



This screen is using the Cognos URL for the "Director of Financial Aid Dashboard", which is defined in the cognos.xml file as:

```
<SET a:symbol="cogURL2"
a:value="${properties.externalSystemURL}/
${properties.cognosSystemID}/cgi-bin/
cognos.cgi?b_action=dashboard&amp;pathinfo=/cm&amp;frag-
header=true&amp;path=storeID(%22i04AD276242AF47B680223538F724B0
6C%22)&amp;ui=h1h3h4" />
```

so that the channel definition of this is then:

```
http://<Site Luminis Server>/cp/ip/
login?sys=cognos&url=${cogURL2}
```

In the Cognos URL definition, note the use of the path=storeID parameter to refer to the Cognos object (the dashboard report) to display. This ID number is unique within a given Cognos installation so it can be advisable to use the actual search path for the object instead of the object ID when referencing it in the URL. The search path for a page/object is found in the Properties dialog, which is available in the Cognos Connection navigator interface.

Further Cognos UI customization

While the Cognos applications (such as Cognos Connection viewer or the Studio applications) can be embedded within a Luminis page using the channel concepts discussed, some of the Cognos UI features may be unnecessary and distract from the overall usability of the page. To address this issue, Cognos provides various URL-based parameters which can control some aspects of the UI for these applications. This section describes those parameters and describes a few examples of setting these up.

Consider again the Cognos URL used to launch the Cognos Connection viewer previously, that was defined in the cognos.xml file:

```
<SET a:symbol="urlPass" a:value=
"${properties.externalSystemURL}/${properties.cognosSystemID}/
cgi-bin/cognos.cgi?b_action=xts.run&amp;m=portal/
cc.xts&amp;gohome=&amp;ui=" />
```

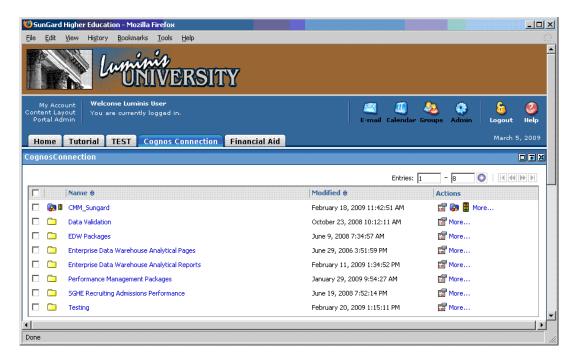
Note

Consider the use of the trailing "ui=" parameter in the URL above. Cognos supports using URL parameters to customize the appearance and functionality of the web pages displayed by the Cognos Connection/ Viewer interface. The "ui" parameter can take different values to display (or hide) various parts of the page. For example, ui=h1h2h3h4 will display all 4 header bars on a Cognos Connection page, whereas "ui=h1" would only display the first header bar. Similarly, the "frag-header" dparameter (=true/false) can be used to customize the appearance of Cognos dashboard reports displayed in Cognos connection. Following the technique described here, these values would get added to the URLs defined in the cognos.xml file, so they could then be referenced in Channel definitions.

For more information on using these parameters, see information about customizing the functionality of Cognos in the *Cognos Administration and Security Guide*.

Putting this into action, you can modify the Cognos Connection URL used earlier (defined in the cognos.xml as urlPass) as:

```
<SET a:symbol="urlPass" a:value=
"${properties.externalSystemURL}/${properties.cognosSystemID}/
cgi-bin/cognos.cgi?b_action=xts.run&amp;m=portal/
cc.xts&amp;gohome=&amp;ui=h1h3h4" />
```



Note

Luminis can be configured to cache certain internal configuration data (such as channel definitions) so you may need to restart Luminis in order for channel definition changes to take effect.

For additional details on defining Luminis channels and UI elements, see the Luminis SDK/Channel Development Guide.

Transaction history tracking process

In Framework Manager, you can view and play back actions performed on the project. An action log is an XML file that contains a set of transactions. Each transaction has a sequence number and one or more actions. The action log file is stored in the project folder.

For example, you make changes to a project in a test environment. When it is time to move the project to production, you can use log files to play back every action, or series of actions, that you performed in the test environment to create an identical project in the production environment. Similarly, as an alternative to branching and merging projects one might want to track a series of customizations applied to a project to enable the identical customizations to be applied to an upgraded version of that model.

There are two action log files. The log.xml file contains all the transactions that have been run and saved in the project. This file is created the first time you save the project and exists until you delete the project. The temporary file contains transactions that have been

run during the current session, but not saved. The temporary file is deleted when you close the project.



Previously you had the option to use the Cognos Branch Merge functionality to retain your customizations. It is recommended using the Cognos Transaction History Tracking functionality instead to maintain institution-specific changes and upgrade your Framework Manager model.

View and save transaction history

You can view the transaction history in an action log file and then save it as a script.

1. From the **Project** menu, click **View Transaction History**.



Tip

To make the dialog box larger, double-click the caption. Double-click again to restore the dialog box to its original size.

2. Click the transaction numbers that you want.



Tip

To view the details of a transaction, click the plus sign (+) next to a transaction number.

- 3. Click Save as Script.
- **4.** Type a name for the file.
- **5.** Click **Save**. Do not save the file in the **logs** folder.
- 6. Click Close.

Play back transactions from a log file

You can choose to play back a specific transaction or a combination of transactions in a project or segment action log file.

When you play back transactions from a log file, the script player applies the commands in the log file to the contents of the existing model. Errors appear if objects created by the log file already exist in the model.

After the script in a log file has run successfully, a backup of the original project is created in the parent directory of the project. If you want to undo the transactions performed in the script, you can use the backup to restore the project to its original state.

You must disable or clear any commands that will conflict with the contents of the model. You can then run the script again.

- 1. From the **Project** menu, click **Run Script**.
- 2. Select the script you want, and click **Open**.
- **3.** If you want to view the details of a transaction, click the transaction.
- **4.** Set the starting or stop point that you want.
 - To set the starting point for running the script, select the script and then click **Set the starting point**. You can do this at any time to skip an instruction or run instructions that have already been executed .
 - To set a stop point for the script, select the script and then click **Set the stop** point 🧶

You can stop the script to make a manual fix and then start it again.

• To remove the stop point, click **Remove the stop point**



5. Using the toolbar buttons, choose the run action that you want.

Buttons	Description
•	Runs the script. After an error is encountered, clicking this button attempts to re-execute the failed instruction.
•	Skips to the next transaction and runs the script to the end
=	Runs the selected transaction only
B	Skips to the next transaction and stops, but does not run any transactions

- **6.** The project window is updated as the script is run.
- 7. Fix any errors encountered by the script either by retargeting objects or modifying the temporary project as required.
- 8. When the script has completed, click **Accept** to accept the changes or click **Revert** to undo the changes.



After you click Accept or Revert, you cannot use Undo and Redo for the current session.

Brand Cognos Connection page

You can brand the Cognos Connection page to meet your institution's needs by customizing the banner, display text fonts, gradient, display color, and other format aspects.

To brand the Cognos Connection, perform the following steps.

- 1. Go to the [install root]\cognos\c#\webcontent\skins folder in your Cognos installation server (where # refers to the Cognos Release number you are currently running).
- **2.** Modify the following style sheets and XML files to reflect the desired display settings:
 - fonts.css
 - · default.css
 - banner.css
 - · system.xml

For detailed instructions on how to modify these files, refer to the *Customizing the IBM Cognos UI* document provided with Cognos.

Customize the welcome splash screen

You can customize the Welcome splash screen to reflect the desired look and feel.

To modify the default splash screen, perform the following steps.

- 1. Go to the [install root]\cognos\c#\webcontent\skins folder in your Cognos installation server (where # refers to the Cognos Release number you are currently running).
- 2. Replace the following image files with your branded files:
 - cognos product label.gif
 - · portal_splash.gif

For additional information on customizing the splash screen, refer to the *Administration* and *Security Guide* document delivered with your Cognos product.

Glossary

This section contains specialized definitions for terminology used within the Banner Enrollment Management Suite.

academic outcome

Outcome is the Banner generic word that identifies the end result of study at an institution. The outcome may be a certificate, associate degree, bachelor degree, and so on.

academic performance

Attributes and measures that demonstrate how a student is progressing in his/her study at the institution. Attributes includes all Credits and GPA and all Academic Standing like attributes.

academic period GPA

Measure that is calculated and reported for the student for each academic period. Calculation: Quality Points/Credits for GPA.

academic standing

Academic standing is the Banner data that measures the student's academic performance in the previous timeframe. Banner rules define the credits and GPA data to be examined before assigning an academic standing value to the student. In the warehouse, we track two values for academic standing (at the beginning and end of each academic period). For example, good standing, probation 1, probation 2, and dismissed. The beginning academic standing is the overridden academic standing from the student's general student record or if the overridden academic standing does not exist, the one stored for the previous academic period is used. The end academic standing is the one stored for the academic period in history.

academic study

Academic Study is used as the generic warehouse label for the student's program, course of study, or curriculum. The Recruiting and Admissions Performance includes the primary or first curriculum attached to each record number (Recruit Number or Application Number) and Student Retention Performance includes only the primary curriculum associated with the student record for each academic period.



PM Analyze Student Progress and its snapshot include the primary curriculum from academic period admit and for the outcome for the academic period graduation.

academic time

Attributes relevant to time frames such as academic year and academic period and some attributes related to those main attributes. They set the time frame for most comparison reporting done in the package.

academic year

Academic Year is a Banner attribute of the academic period. An academic year is made up of multiple academic periods that are usually 2 semesters, 3 trimesters, or 4 quarters that make up a school year.

academic year GPA

Measure that is calculated as Quality Points/Credits for GPA for all the academic periods within the academic year.

ad hoc report

Ad hoc reports are reports that are created without advance notice. These are created at the moment they are needed. They can contain trends, summaries or detail, and can be sorted, grouped, summarized, and filtered using many different data fields. Ad hoc reports are often created by non-technical staff members.

admit

To admit a student, the institution creates an admission record (SARADAP) and enters an application decision that extends an offer of admission (SARDCRV with a STVAPDC with STVAPDC INST ACC IND with the value 'Y').

admit academic study

Admit Academic Study is the generic warehouse label for the student's program, course of study, or curriculum at the time of admission to the institution.



Note

PM Analysis Student Progress includes the primary curriculum from academic period admit and for the outcome for the academic period graduation. The Admit academic study attributes appear for all academic periods after the academic period admit until there is a new academic period admit usually implying admission to a new student level.

admit rate

Calculation used to compare the number and percent of prospective students who move from an Applicant funnel status to an Admit funnel status in the reported time frame. Calculation: (Admit/Applicant).

advisor

See "faculty".

aggregate table

Aggregate tables are database table that begins with 'WAT'. This table combines the data from multiple fact tables to make streamline their use in the Cognos FM Model.

applicant

The person or the institution has entered an application for admission (SARADAP) record for a specific term and level.

banner contact

Banner contact is the attribute defined by the institution to track the number of contacts a person had with the institution.

business concept

A logical (or functional) grouping of data that supports the reporting requirements of the business. See <u>"multi-fact business concepts"</u>.

business rule

The set of objects, consisting of rules, rule sets, URIs, and constants, that works in combination to carry out an action within the system. You define business rules to manage your institution's requirements within a campaign. You should create a rule to perform a reusable business task. For example, you might create a rule to provide information needed by a campaign to determine the next activity that should occur. One or more rules are grouped in rule sets identified by a unique name called a Universal Resource Identifier (URI). To execute a rule, you reference the URI associated with the rule set that contains the rule. When you use the rule, the named input and output arguments defined in the rule are passed to the campaign or other application using the rule.

campaign

A pre-defined sequence of activities designed to achieve a specific goal. The focus of a campaign is a communication plan that is directed towards people and organizations. It may have fixed or relative dates. A fixed date is a specific designated date and time, such as October 12, 2008 at 1:00 am. A relative date is a date and time that is expressed in relationship to another date/time, and is specified by a date/time interval, such as two weeks later.

campaign activity

A single task in a campaign that is performed by the system and/or the user. A campaign activity is executed automatically by the system and does not require direct human intervention, for example, the system-generated mass circulation of an e-mail.

campaign administrator role

The role that is responsible for creating and building the campaign. The campaign administrator role has all the system privileges (create, read, update, delete) for the campaign record, the activities in the campaign, and the graphical model of the campaign.

campaign goal

The desired outcome of a campaign, such as to increase the diversity of the student body or to attract and enroll more out-of state students.

campaign modeler

Campaign Modeler is a Banner Relationship Management graphic tool used to define and build a campaign process using drawing tools and canvas. You can drag and drop activities and steps onto the drawing canvas, connect them using transition lines, and indicate decision points.

campaign status

The status of a campaign identifies the steps from the initial definition of the campaign record through the completion of the graphical model associated with the campaign. Campaign statuses may include stopped, completed, and ready.

campus engagement and activities participant

A set of attributes that display by academic period Banner Activities, Banner Athletic Competition (sports association), Advisor Assignments, Banner Contacts, BRM Campaign, Communication, and Interactions.

class behaviors

Indicators to identify the persons who registered late, the date of registration and those who officially withdraw from a section after the beginning of the academic period by the course registration status. There are a number of Banner data elements stored either for the student or for a student course that identify class behaviors.

cognos package

The Cognos end user layer that represents the data included in a business concept used to create reports.

cohort

See "student cohort"

college retention rate

The college retention rate is calculated as: (Number of students who register in a college (academic study attribute College) in the latter academic period)/(number of students who registered in that college for the former academic period minus anyone who should be excluded in that college). This may be Like (Fall to Fall) or Sequential (Fall to Spring), former and latter academic periods.

communication template

A communication template is used to produce and send a large number of similarly formatted communications to a group of individuals. Within a campaign, communication templates are included using the MCC activity type.

confirm

The student's confirmation is identified by the system if an admissions (SARADAP) record exists and the applicant has accepted the offer (commonly, an application decision that says the person accepts the offer of admission only if the SARDCRV record consist of STVAPDC record with STVAPDC_STDN_ACC_IND with the value 'Y') in any number of ways (paid a deposit, signed up for orientation, accepted financial aid or a scholarship, and so on.)

confirm yield

Calculation used to compare the number or percent of prospective students who move from an Admit funnel status to a Confirm funnel status in the reported time frame. Calculation: (Confirms/Admits)

constant

A piece of information within a rule whose value you do not want to change. You can reuse constants in an unlimited number of rules.

Contact

See "banner contact"

contacts with advisors, faculty, financial aid

The contacts with advisors, faculty, and financial aid include Banner Contacts and Banner Relationship Management Manual Interaction data.

conversion rate

Calculation used to compare the number or percent of prospective students who move from an Inquiry funnel status to an Applicant funnel status in the reported time frame. Calculation: (Applicants/Inquiries)

count

The number of individual items (for example, the total count of applications where someone may submit applications to different programs, curriculums, or they have many student attributes, and so on).

course credits

Credits as determined by the course credits designed by registration in a course.

course drop rate

The course drop rate is the number of students who were registered for a course but now have a course registration status where the count in enrolled indicator is equal to 'No' (SFRSTCR_RSTS_CODE with a STVRSTS_INCL_SECT_ENRL with the value 'N').

course failed rate

The course failed rate is calculated as: course failed count in a specific Course Identification (subject and course number)/number of students who were included in the initial course registered count for that course, course reference number, and so on.

course initial registered count

Student who has or had a course registration status with an indicator to count the student as registered (SFRSTCR_RSTS_CODE with a STVRSTS_INCL_SECT_ENRL = 'Y') in the student course (Course Identification). The sum of Course Registered plus Course Dropped plus Course Withdrawn Count is equal to the Course Initial Registered Count. This count may be used with the Registered by Census indicator In to determine the number registered as of the census date.

course passed rate

This is the number of students who receive a grade that adds to Credits Passed (SHRTCKG_GRDE_CODE_FINAL or SFRSTCR_GRDE_CODE with a SHRGRDE_PASSED_IND = 'Y') in a specific Course Identification (Subject and Course number)/number of students whose grade counted in credits attempted.

course registered count

Student with a course registration status with an indicator to count as enrolled (SFRSTCR_RSTS_CODE with a STVRSTS_INCL_SECT_ENRL = 'Y') for a specified

course (Course Identification). This count may be used with the Registered by Census indicator In to determine the number registered as of the Census Date.

course success rate

See "course passed rate"

course withdrawn rate

Course withdrawn rate is calculated as: Number of students who are registered for a course but now have a course registration status where the withdrawn indicator equal to 'Yes' (SFRSTCR_RSTS_CODE with a STVRSTS_WITHDRAW_IND = 'Y')/number of students who are initially registered.

cross tab report

A report format that is organized into rows and columns, similar to an Excel spreadsheet format. Cross tab reports display summarized counts, totals, amounts, percentages and ratios according to the columns and rows included in the report.

cube

A cube is a three dimensional storage of data that increases speed for analysis of data. Performance products are delivered with prebuilt Cognos cubes that are loaded with data by scheduling a job. Cubes are basically precalculated reports with data that you can rearrange and reformat.

cumulative credits

Cumulative credit is the subset of student total credits as determined by the grades associated with all student courses through the academic period reported.

cumulative GPA

Cumulative GPA is the measure that is calculated as: Cumulative Quality Points/ Cumulative Credits for GPA for all the academic periods attended by the student through the academic period being reported. This is an accumulating measure for each academic period.

cycle

Cycle can be the Recruitment Funnel, Admissions Cycle, Enrollment Funnel, or other names used to identify the processing cycle. Variations can be current cycle, active cycle, and past cycle.

demographics

Demographic attributes include gender, minority (race/ethnicity), traditional age, citizenship, veteran, legacy, and so on.

detail report

A report format that lists detailed information about individual prospects, applicants, recruiters, campaigns or any other business component. Typically detailed reports are lists that are grouped or sorted in a particular order.

developmental course

Instructional courses designed for students deficient in the general competencies necessary for a regular postsecondary curriculum and educational setting. Student courses are loaded as developmental courses using institution defined EDW extract parameter that identifies the student course attribute(s) that identify the course as developmental.

dimension table

Database tables that store related sets of attributes that may be associated with one or more fact tables in the data warehouse.

diversity

Diversity is the set of person demographic attributes and indicators that may be used to group students. These attributes include gender, minority (race/ethnicity), traditional age, residency citizenship, veteran, international student, legacy, and so on.

drop rate

See "course drop rate"

EDW Extract Parameter

EDW Extract parameters are the values entered through the Admin UI by the institution to define the way in which the data is loaded in the data warehouse tables. These must be reviewed and set prior to executing any of the jobs to load the data into the data warehouse.

EM campaign

A pre-defined sequence of activities designed to achieve a specific goal. The focus of a campaign is a communication plan that is directed towards people and organizations. It may have fixed or relative dates. A fixed date is a specific designated date and time, like October 12, 2008 at 1:00 am. A relative date is a date and time that is expressed in relationship to another date and time, and is specified by a date/time interval, such as two weeks later.

enroll

A person is considered enrolled at the institution when that person has the Banner registration record (SFBETRM) for the academic period.

enrolled headcount

Enrolled headcount is the number of students who have an enrolled indicator with a value of 'Yes' for the academic period.

enrolled ind

The Enrolled Ind attribute identifies a student where the student has an enrollment record (Banner SFBETRM with the SFRSTCR_ESTS_CODE where the STVESTS_EFF_HEADCOUNT has the value 'Y') or they have a Institutional Course Maintenance Term Header (SHRTTRM) for the academic period. This does not check the student level. So, if used in a headcount of students, the attribute student level must be used in the report.

enrollment yield

Calculation used to compare the number and percent of prospective students who move from an Admit funnel status to an Enroll funnel status in the reported time frame. Calculation: (Enrolled/Admits).

exclusion

Students who may be removed (deleted) from the divisor when calculating a retention or graduation rate. Students are excluded because they are deceased, graduated or have been called into active military service, service with a foreign aid service of the federal government, such as the Peace Corps; or service on official church missions. Students with these exclusions are identified using an institution defined EDW Extract parameter that identifies the student statuses (STVSTST) or enrollment statuses (STVESTS) that identify students who should be excluded when calculating retention rates.

expression

Expression is the SQL query used to search the system and retrieve a set of data that meet the criteria specified in the query. The resulting data set, for example a group of prospects, recruits, or applicants identified by their IDs, share the common attributes defined in the query. After you execute an expression, you can save the resulting data set as a population list. You create an expression using the Expression Builder by selecting attributes and operators to build rules.

You can build complex expressions by creating groups of conditions within an expression. You can provide values for attributes when you build the expression or make the values dynamic by supplying them when you run the expression.

fact table

Fact table is the database table that begins with 'WFT'. The fact tables store all of the measures related to a concept defined in a star schema. There are one or many dimension tables associated with a fact table defined to the data warehouse.

faculty

Faculty represents two groups of persons added to the business concept. First group is the advisors who are added to Banner as faculty information with an advisor flag that is set as 'Yes' and given as an advisor assigned to a student. The second group is added to Banner as an instructor with a faculty flag that is set as 'Yes' and shown as the primary instructor for a student course.

field of study

Part of the students curriculum that identifies the major or minor subject emphasis. Currently, only the first and second major for a curriculum are brought into the warehouse.

financial aid need classifications

Attributes that measure with the percent of the aid offered by financial aid source or type are provided. Also, these attributes classify students as Financial Aid Applicant, Need Eligible Ind, Need Met Ind, and indicators of if there was an Aid Offered, Aid Accepted, and Aid Paid.

financial aid source

Attributes of aid offered by Banner financial aid sources such as institution, federal, state, or other.

financial aid type

Attributes of aid offered by the Banner financial aid types such as grant, loan, scholarship, and work.

FM model

Cognos meta data layer that usually represents a business concept and is delivered as one or more packages.

funnel

The component of the academic life cycle that defines the progression of steps within the student recruitment process. The Admissions cycle tracks prospective students from the point they become known to the institution until the institution enrolls them. During the process, each prospective student progresses through a series of interactions with the institution that are steps toward a successful conclusion - for example the individual's completion of an application, the institution's evaluation of that application, and the final decision on that application. The Admissions process continues after acceptance up until the student arrives on campus and attends classes. Banner Relationship Management provides the following qualifying recruitment funnel states as baseline samples in the system: Prospect, Inquiry, Applicant, Admit, Confirm, and Enroll.

funnel instance

An implementation of a funnel model for a particular term and student academic level, used to track the progress of that group of constituents toward enrollment.

funnel model

A specific pattern for a funnel, containing the series of conditions, or states, that an institution defines to mark a prospective student's progress towards a particular enrollment goal. These states include events such as a prospect's inquiry, the prospect's filing of an application, your review of that application, your subsequent actions upon it, and the prospect's response.

funnel status

An individual constituent's position or placement at a given time within the funnel. The funnel status is also referred as funnel state.

geographic region/postal

Geographic division, geographic region, city, state/province, county, and nation that are available for the person and for secondary school and post secondary school address.

graduation headcount

Measure that provides an unduplicated headcount of the persons who have an academic outcome awarded indicator equal to 'Yes' for the academic period reported. Persons must have Banner SHRDGMR record with an academic period graduation recorded to be included in this headcount (SHRDGMR_DEGS_CODE with the STVDEGS_AWARD_STATUS_IND = 'A').

Also, see "student cohort graduation headcount"

headcount

The number of distinct individuals (for example, if an applicant applies more than once, the headcount option only counts the person one time).

highest test score

Attribute that identifies the test score as defined by the institution in the EDW Load parameter value when data was moved to the warehouse. Values are defined for a Graduate Test 1 & 2, Placement Test 1 & 2, Mathematics, Language, some standard scores such as ACT Composite and SAT Combined, and so on.

Also, see "EDW Extract Parameter"

inquiry

A recruiting (SRBRECR) record exists for a specific term and level and either a Prospective Student Portal account has been created, or there are one or more specific types of interactions that have been initiated by the prospect with the institution (attended a high school fair, had a campus visit, called for more information, and so on).

key performance indicator (KPI)

Help achieve organizational goals by defining and measuring progress. They are agreed upon as indicators which can be measured, and that reflect success factors. The KPIs selected must reflect the organization's goals, be key to its success, and be measurable, and they are long-term considerations for an organization.

Organizations usually monitor progress towards KPIs on a monthly (or daily, weekly) basis. They assign target (such as desired) values for each month and then compare their targets with actual values. Actual values are normally extracted from an organization's information system or data warehouse. Assessing the difference between target and actual measures performance and progress towards achieving related goals and objectives

layout library

A file that includes reusable report components like headers, footers, and prompt page information. The components defined in the layout library are used within the Template, which is a report template used as the basis for Report Studio reports. You can change a component once in the layout library and the change will carry to the Template and all reports based on the template.

level cumulative GPA

Cumulative GPA is calculated as: Sum of all credits for GPA/all quality points through the academic period displayed on a report. It can be divided by student level when adding that academic study attribute to the report.

major change count

Number of different first major on the priority or primary academic study records from the first academic period attended through the last academic period attended.

manual interaction

A manual interaction is created in the Banner Relationship Management product. A manually entered BRM interaction has Interaction Source as "ManuallyEntered" and an Integration Category as "Manual" or any other category code that the client may create for manual interactions. Examples are Advising, Mentorship, Tutoring, Financial, and so on.

Multi Channel Communication (MCC)

The component of the Banner Relationship Management application that clients use to create communication templates (such as for e-mail distribution) to send information to prospective students. MCC activities allow for sending a communication to a number of prospective students at once or to a single individual. The MCC tool also tracks distributed communications. You can send e-mails, letters, or targeted announcements. When used in a campaign and the campaign process reaches the MCC activity, the communication will automatically be sent to each individual on the population list. If alerts or errors occur for a campaign instance, you will be able to monitor and respond to these alerts.

multi-fact business concepts

Several of the Banner Student Retention Performance business concepts use many fact tables together to report on any of the data combined in the Framework Manager model on a report. Some use an aggregate fact table to combine and report the data from multiple facts.

Also, see "aggregate table".

outcome academic study

Generic warehouse label for the student's program, course of study, or curriculum at the time of graduation from the institution.



Note

PM Analysis Student Progress includes the primary curriculum from academic period admit and for the outcome for the academic period graduation.

Outcome academic study attributes appear when there is a Banner outcome record and all academic periods after it is created, whether or not the outcome awarded indicator equal to 'Yes'.

outcome credits

Outcome credit is the subset of student total credits as determined by the grades associated with courses that are used to complete requirements, and calculate GPA for the academic outcome.

parameter map

Values entered through the Admin UI by the institution to define the way in which data is displayed in the Cognos packages. These values can be changed at any time and reflected immediately through the Cognos Connection. However, it is recommended that values set for the parameter maps should be reviewed and set during data setup for the warehouse.

performance chart

A performance chart is simply a graphic report built with Report Studio, and designed to fit in one of the dashboard report sections. Several different performance charts are delivered with each performance product.

permission

Permissions are a means of implementing security within Banner Relationship Management. Permissions are assigned to a user role. Each permission defines the level of access a user has within the workspace. You use a permission to allow or restrict access to areas of the workspace. For example, you can create a permission that allows a user to only view campaign details and create another permission that allows a user to add, edit or delete campaign information.

persisted

Indicates whether the student who is with the institution in the previous academic period is also there in the next academic period. There are a number of attributes in the Student Retention Performance packages that give this information but do not have this specific label.

See <u>"retention status"</u> and the various headcounts provided.

population list

A defined group of individual profiles used as the target audience for a particular goal. A population list consists of a number of prospective constituents, or profiles, that share one or more common attributes or groups of attributes. You create a population list to serve as the target of an enrollment campaign or communication.

post secondary school

All post secondary schools attended are available in the Performance package. Post secondary school degree and major information include academic outcomes and a record for this institution. This helps to provide accurate information for undergraduates from this institution applying for a graduate program. The Latest Post Secondary Ind attribute set with a value 'Yes' identifies the last Post-Secondary school attended by the student recorded in Banner.

post secondary school characteristics

Attribute that identifies the institution as either public/private or 2 year/4 year. The Banner source background characteristic codes defined by the institution must be defined as EDW Extract Parameters to make this data to be available.

post secondary school last attended

Attribute that identifies the last post secondary school attended by the student who is recorded on Banner. Data from previous education (SORPCOL) and from institution academic outcomes (SHRDGMR) are used to determine the last institution attended.

pre student academic ability

See "quality attributes"

primary advisor

The advisor assigned for the academic period marked with a primary advisor indicator 'Yes' is known as the Primary Advisor. The Primary Advisors are (with advisor type and primary indicator) assigned to the student by academic period using the Banner Advisor Assignment Form (SGAADVR).

probability and desirability score

The probability and desirability score is calculated based on the model defined by your institution. The data can be reviewed as the overall score or divided by factor groups and factors.

profile manager

The workspace component of the Banner Relationship Management application that recruiters use to manage information about prospective students. It provides a complete view of a recruiter's prospects.

program retention rate

The program retention rate is calculated as: Number of students who register in a program (academic study attribute Program) in the latter academic period/(the number of students who registered in that program for the former academic period minus any one who should be excluded in that program). The program retention rate can be calculated for Like (Fall to Fall) or Sequential (Fall to Spring), former, and latter academic periods.

progress to degree

The progress to degree is the Banner data that is used for identifying End of Term Academic Standing, Cumulative, Academic Year, and Academic Period GPAs and Total and Cumulative Credits.

prospect

Prospect is a recruiting (SRBRECR) record that exist for a specific term and level. For example, names or data purchased from the College Board.

prospective student

Any person who has either a recruitment information or admission application record or both for the academic period.

Prospective Student Portal (PSP)

The web interface that provides an individual's access to the university, prior to his or her acceptance and enrollment. The PSP is a designated "slice" of the Luminis Platform; in other words, you do not need to own the entire Luminis product to use Banner Relationship Management. PSP excludes the Luminis e-mail and calendar functionality.

quality attributes

Quality attributes are the pre-student academic quality measures (academic ability) that include Secondary School GPA, Secondary School Percentile, ACT Composite, SAT Combined test scores, and other institution specified tests. These may also include Transfer Credits & Ranges and Transfer GPA & Ranges as applicable.

registered headcount

Registered headcounts are calculated as the number of students who have at least one registered section (SFRSTCR with the SFRSTCR_RSTS_CODE with a STVRSTS_INCL_SECT_ENRL = 'Y') record for the academic period.

registered ind

Attribute that identifies whether a student has registration in the academic period for at least one student course (Banner SFRSTCR or SHRTCKN).

remedial courses

See "developmental course"

response rate

Calculation used to compare the number and percent of prospective students who move from a Prospect funnel status to an Inquiry funnel status in the reported time frame. Calculation: (Inquiries/Prospects)

retention period/academic period (specific)

Timeframe that permits comparison reporting of metrics. Each retention period in the package includes a unique set of academic periods (from - to) for reporting. It is important to understand that the retention status displayed with a retention period identifies the retention forward. It identifies status for the person who was registered in the from academic period in the to academic period.

It is important to understand that the retention status displayed with a retention period identifies the retention forward. It identifies the retention status for the person who was registered in the "from" academic period and their retention status for the "to" academic period.

retention rate

The Retention Rate measures the number of students who register (have a registration status that counts in enrolled) for the next academic period/number of students who were registered in the first academic period minus any excluded students.

retention status

Retention Status identifies whether the student who is registered in one academic period is registered in the next (like or sequential) academic period. The retention status values are excluded (as the student is deceased, graduated, or has one of the status specified in the EDW Extract Parameters), retained (registered in the to academic period), or not retained (did not register for the to academic period).

role

An institution-defined job responsibility that can be associated with one or more business processes and tasks, such as a recruiter, an admissions officer, admissions office student worker. Each user account must be assigned to at least one role. The role assignment defines what areas of the system the user can access.

rule

The component within business rules that defines the rule statement, which specifies business logic used within the system. You define business rules to manage your institution's requirements, such as to modify funnel status calculation. One or more business rules are grouped in a rule set that is associated with a Universal Resource Identifier (URI). To execute a business rule, you execute the URI associated with the rule set that contains the rule. When you run the rule, the named input and output arguments defined in the rule are passed to the set of rules, and the results are returned as a ResultSet of objects.

rule set

A rule set is a container that holds one or more rules. The rule set is the executable unit within business rules. You execute a rule in the context of a rule set by identifying the URI associated with the rule set.

secondary school characteristics

Identifies the institution as either public, private, or the person was representing homeschooled. The Banner source background characteristic codes defined by the institution must be defined as EDW Extract Parameters for this data to be available.

snapshot

Data warehouse tables that are 'frozen' in time. Snapshots capture data for specific events (such as Early Decision) or on a recurring calendar basis (for example, daily, weekly, monthly). Snapshot tables are designed to support longitudinal reporting and scorecards. Reports that show results over time are easily created from snapshots. Snapshots also contain measures that may be loaded into Scorecard KPI 'actual' values.

student attribute

Institution defined student attributes recorded in Banner for the student by academic period to track special characteristics used to identify and segregate students for reporting.

student classification

Student classification attribute normally defined as first year, second year, third year, freshman, sophomore, and so on as the student begins the academic period.

student cohort

Institution defined student cohorts recorded in Banner for the student by academic period. For example, the cohort may be the Fall 2010 Bachelor of Science Students or any other group that the institution wants to track from admission to graduation.

student cohort graduation headcount

Unduplicated number of students who have a student cohort and an academic outcome awarded indicator equal to 'Yes' in an academic period.

student cohort graduation rate

The student cohort graduation rate is calculated as: Number of student cohort graduated/number of persons expected to complete an outcome (student cohort graduation status equal 'Expected').

student cohort graduation status

Institution defined student cohorts that are defined in Banner with a cohort end academic period will have a calculated graduation status in the warehouse. Student are either Not Expected, Expected, or Past Expected as a graduation status by comparing the student cohort academic period end to the academic period loaded into the data warehouse tables.

student course

Includes all student courses that are Registration (in progress), History (completed), and Transfer (transferred from a previous post secondary school) with student specific details such as the final grade and credits. The student course attributes include course

data such as course identification, subject, course number, section detail like schedule type, instructional method, session and meeting days and times, primary instructor, initial registration status date, current registration status, and date. Measures include course headcounts and rates, credits, and GPA.

student engagement

student engagement includes measures and attributes that analyze how engaged the student is with and by the institution. Data includes all interactions (manual, Banner contact, communication, campaigns), activities, athletics, and advisor assignment.

student financials

Includes a subset of the data used for financial aid needs analysis. These attributes include some federal and institutional methodology data as well as indicators that may be used to determine, if the financial assistance offered to the student may have an impact on their retention.

student headcount

Student headcount is the unduplicated count of persons who are eligible to enroll or have course registration in the academic period. The system calculates the student headcount from the number of student records that meet at least one of the following criteria:

- Student has a Permit to Enroll Ind attribute with value *Yes* (SGBSTDN_STST_CODE that has a STVSTST_REG_IND = 'Y').
- Student has registration or history student courses for the academic period (has a SFRSTCR or SHRTCKN record).
- Student meet the readmission academic period criteria for the academic period loaded (registered in the academic period or a later academic period that the one specified in the SOBTERM READM REQ rule).

When looking at Student Academic Period measures the student headcount should equal the sum of Registered Headcount, Withdrawn Headcount, and Student Not Registered Headcount, when all Banner indicators are set as expected.

student level

Attribute that identifies the student levels such as graduate, undergraduate, and so on.

student level retention rate

The student level retention rate is calculated as: Number of students who register in a student level (academic study attribute Student Level) in the latter academic period/ (the number of students who registered in that student level for the former academic period minus any who should be excluded in that student level). This may be like (Fall to Fall) or sequential (Fall to Spring), former and latter academic periods.

Glossary

student not registered headcount

Student not registered headcount is the unduplicated count of persons who do not have any enrollment or registration activity for the academic period (no Banner SFBETRM or SHRTTRM records). Also, this attribute gives the number of persons who are eligible to enroll or have a SGBSTDN_STST_CODE parameter with a Permit to Enroll Ind attribute that is set with a value 'Yes'.

student performance

Measures and attributes that analyze how the student is progressing and performing while being retained by the institution. Student performance data includes all enrollment patterns, academic standing, GPAs, credits earned, outcomes awarded, and student course detail.

student population

Student population attribute identifies the Banner student type normally defined as new first time, transfer, continuing, and so on.

student progress

see "academic performance"

student retention rate

See "retention rate"

student retention status

Identifies whether the student counts in the overall, student level, program, and college retention headcount for the Retention Period (like or sequential). This attribute has one of the values such as Retained, Not Retained, or Excluded.

student status indicators

Set of indicators that may be used to divide and classify student numbers and to analyze students by common attributes. For example, students with housing assignments, applying for an outcome (degree), new students for the academic period, and so on.

summary report

A report format that contains aggregated, summary numbers, counts, ratios, or percentages. Usually, summary reports display aggregated values grouped and sorted by a set of specific attributes such as Funnel Status, demographics, ranges of academic scores, or diversity categories.

target

target is the group of individuals or an organization (such as a high school) that share a set of common characteristics (attributes) and is connected to a campaign. Targets can also be used for other purposes, such as for ad-hoc activities and communications.

term GPA

See "academic period GPA"

total credits

Subset of student total credits as determined by the grades associated with all student courses for a specific academic period.

trend report

A report format that shows summary results over time (for example, weekly, monthly, academic terms, academic years). Trend reports are used to document changes in outcomes over time. Often they are used during a planning phase to understand previous results before setting goals and objectives for future campaigns or initiatives.

URI (Universal Resource Identifier)

A URI, or Universal Resource Identifier, is the unique name used to identify a rule set. You associate a URI with a rule set to give the rule set an immutable and unique identifier. The URI name is the actual rule component that you execute to perform the rules within the associated rule set.

user

A person who log in to Banner Relationship Management, Performance product, or Banner system. A user needs a user account with a unique user ID and password to access the system. In addition, each user account must be assigned permissions within the specific product security set up. For example, in the Banner Relationship Management product, a role assignment defines what areas of the system the user can access. After you create user accounts and roles, you apply permissions to roles and then associate user accounts with roles. This gives each user the access permissions defined by their assigned roles.

withdrawn headcount

Number of students who had an enrolled indicator of 'Yes' for the academic period but now has an Enrollment Status with a withdrawn indicator equal to 'Yes' (SFBETRM_ESTS_CODE with a STVESTS_WD_IND or STVESTS_THIRD_PARTY_WD_IND = 'Y').