Banner Operational Data Store
User Guide

Release 9.0
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Revision History

Publication Date	Summary
August 2016	Revised version that reflects defect corrections to the Banner Operational Data Store 9.0 software.

Contents

Overview

The User Guide includes information about how to set up database warehouse data that define aspects of how data will be loaded into the database and how it will display in reports. This guide includes information intended for use by functional end users to work with the warehouse data. It also includes information about the ODS business concepts and Cognos reports delivered with the database.

Prior to the Banner ODS 8.5 release, there was a Banner ODS Handbook that supported the Banner ODS product. The Handbook is divided into two guides: Banner ODS Administration Guide (this guide) and Banner ODS User Guide.

Note: Banner ODS 9.0 release is for 'ODS only' customers. Institutions whose environment exclusively consists of Banner ODS will be able to upgrade to Banner ODS 9.0 at this time. The sections that have references to EDW in this document are not updated with this release.

BPRA Products

The complete set of Banner Performance Reporting and Analytics (BPRA) products give 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. The BPRA solution set includes the following products:

- Banner Operational Data Store (ODS)
- Banner Enterprise Data Warehouse (EDW)
- Advancement Performance/Advancement Analytics for Cognos (AAC)
- Banner Recruiting and Admissions Performance (RAP)
- Banner Student Retention Performance (SRP)
- Institutional Performance Management (IPM)

Your institution may license some or all of these products. If you do license products in addition to the Banner ODS, it is important that you understand the relationship among all of the products as you use them. You can use the products together to help you make informed decisions, guide strategic institutional planning and forecasting based on analysis of historical trends, and enhance institutional performance.

Banner Operational Data Store

The Banner ODS enables you to extract information from your source administrative systems, reorganize the information into a simplified format, and store the information 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 pre-joined 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.

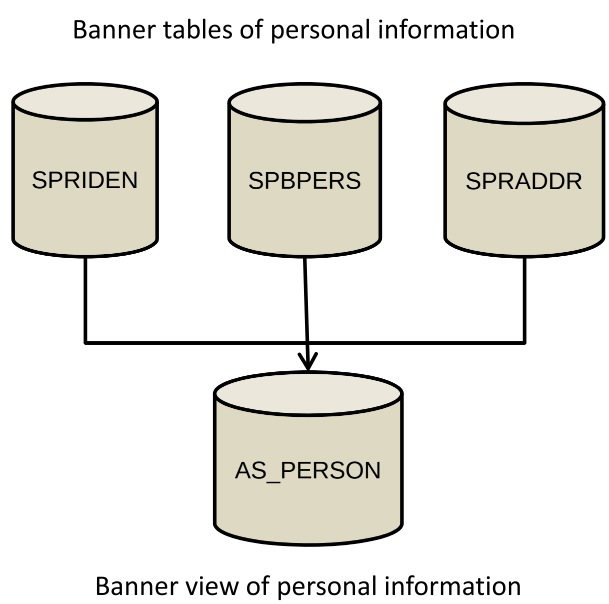


Figure 1: Banner to Banner ODS table consolidation

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. In the ODS, you can access the replicated source data in the ODS without the need to understand the complexities of the data structure because you can retrieve the data from the view.

Integration of Degree Works with ODS

Institutions using Degree Works and the Banner Operational Data Store will be able to report on data from degree audit results to determine which students are ready to graduate and which students are at risk of not completing their outcomes. This is done by utilizing a percentage range of the degree requirements or credit requirements completed, or GPA range, by student classification, major, minor or concentration as well as other student characteristics. This has been accomplished by creating a new reporting business concept, adding several new reporting views, and delivering pre-defined IBM Cognos reports.

The integration of both Degree Works and Banner XE Registration into the Banner Operational Data Store provides institutions reporting opportunities to better plan and determine what courses the institution needs to offer and how many sections/seats are needed. They will be able to count the number of students that must take or may take a specific course to satisfy a specific program requirement. This has been accomplished by creating a new reporting business concept, adding several new reporting views, and delivering pre-defined IBM Cognos reports.

Institutions using either Degree Works or Banner XE Registration with the Banner Operational Data Store will have the same reporting opportunities. For more information on the reporting business concepts and the IBM Cognos reports, refer Banner ODS Business Concepts and Banner ODS Reports chapters of this user guide.

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 summary and detail levels
- Snapshot stars that offer a historical picture 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 pre-built metadata integration with the IBM Cognos BI software to enable fast deployment of reports and analytics.

Note: Banner EDW includes Advancement specific components intended for use with the Advancement Analytics for Cognos product. It is possible to source these packages from both the Advance and Banner Advancement systems.

Performance Management products

The Performance Management products are a subset of BPRA products that you can license and use in conjunction with the Banner ODS and Banner EDW to monitor and manage your institutions business objectives and analyze outcomes. Following are the Performance Management products:

- Advancement Performance/Advancement Analytics for Cognos (AP/AAC)
- Banner Recruiting and Admissions Performance (RAP)
- Banner Student Retention Performance (SRP)

- Institutional Performance Management (IPM)

Each Performance Management product includes some or all of 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. The 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.

The following table lists which Cognos objects are delivered with each of the Performance Management products.

	AAC	RAP	SRP	IPM
Business concept packages	X	X	X	X
Cubes	X	X	X	
Reports	X	X	X	X
Dashboards and performance charts	X	X	X	
Scorecard	X	X	X	

Advancement Performance/Advancement Analytics for Cognos

The Advancement Performance solution provides Advancement organizations (Advance and Banner Advancement 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 allows 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. You can use RAP to report, analyze, monitor and track performance; define goals and objectives; and measure progress against key performance indicators. Banner Recruiting and Admissions Performance also lets you easily access recruitment, admissions, and selected financial aid information and use it to create reports.

RAP includes a package of operational reports. These reports display trends of outcomes, summaries of current outcomes and detailed lists of recruits and applicants. The solution also includes capabilities to configure organizational scorecards to reflect your organization’s specific recruitment goals, objectives, and Key Performance Indicators (KPIs).

Banner Student Retention Performance

The Banner Student Retention Performance product provides a package of reports and analytic components that support common student retention performance goals and objectives. You can use SRP 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.

SRP 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

Institutional Performance Management

The Institutional Performance Management product provides a robust set of reports that illustrate your institution’s progress measured against a number of key metrics. Each report illustrates a different metric, for example, 3-, 4-, and 5-year graduation rates, progress for an advancement campaign, total expenditures at the institution, and number of applications.

Related documentation

You can refer to the following documents for more details about the Banner ODS components and the related Cognos components if you license them.

Banner ODS Administration Guide

The *Banner Operational Data Store Administration Guide* includes information about the warehouse architecture and how to maintain the warehouse using the Administrative User Interface. The Administration Guide also includes information about Cognos Business Intelligence reporting tools used with the warehouse.

Banner ODS Installation and Upgrade Guides

The *Banner Operational Data Store Installation and Upgrade Guides* include instructions for installing or upgrading the Banner EDW product.

Cognos components (Handbook available if you license that product)

If you license the Performance products that use the warehouse as the basis for reporting, you will have access to the following guides. (Each Handbook is available if you license that product.)

- *Advancement Analytics for Cognos Handbook*
- *Banner Recruiting and Admissions Performance Handbook*
- *Banner Student Retention Performance Handbook*
- *Institutional Performance Management User Guide*

Ellucian Analytics Resource Guidelines

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

Banner ODS 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 being performed.

The Banner ODS is designed to take advantage of Cognos Framework Manager's ability to use database objects in multiple models. Each model is 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 or primary fact table query subject.

All other query subjects are related to each other through the central or primary fact table. All data analysis and reporting completed using the business concept uses the central fact table to filter and determine what data to retrieve.

Banner ODS Business Concepts

The following table lists the business concept and primary reporting view or database table for each business concept within the Banner ODS. These concepts are listed by subject areas. A subject area loosely corresponds to a Banner product. When you write a report, use filters on the primary reporting view rather than the other reporting views whenever possible.

Subject Area	Business Concept	Primary Fact Table
Accounts Receivable	Receivable Customer	RECEIVABLE_ACCOUNT
	Receivable Revenue	RECEIVABLE_ACCOUNT_DETAIL
Advancement	Advancement Rating	PROSPECT_INFO
	Advancement Rating	ADVANCEMENT_RATING
	Annual Giving	ANNUAL_GIVING
	Annual Giving Comparison	ANNUAL_GIVING
	Campaign Giving History	CAMPAIGN_GIVING_HISTORY
	Campaign Management	CAMPAIGN
	Constituent	CONSTITUENT

Subject Area	Business Concept	Primary Fact Table
	Constituent Entity	CONSTITUENT_ENTITY
	Designation	DESIGNATION
	Designation Giving History	DESIGNATION_GIVING_HISTORY
	Gift	GIFT_TRANSACTION
	Organizational Constituent	ORGANIZATIONAL_CONSTITUENT
	Pledge	PLEDGE_TRANSACTION
	Solicitation Effort	SOLICITOR_ORGANIZATION
Common	Event	EVENT
	Institution	INSTITUTION
	Organization Entity	ORGANIZATION_ENTITY
	Person Demographic	PERSON_DETAIL
	Person Role	PERSON_DETAIL
	Person Supplemental	PERSON_DETAIL
	Relationship	RELATIONSHIP
Finance	Account Index Audit	ACCOUNT_INDEX
	Budget Availability Comparison	BUDGET_AVAILABILITY_LEDGER
	Budget Availability Ledger	BUDGET_AVAILABILITY_LEDGER
	Budget Detail	BUDGET_DETAIL
	Cashier Session Analysis	RECEIVABLE_ACOUNT_DETAIL
	Encumbrance	ENCUMBRANCE_ACCOUNTING
	Endowment Distribution	ENDOWMENT_DISTRIBUTION
	Endowment Units	ENDOWMENT_UNIT
	Fixed Asset	FIXED_ASSET_ITEM
	General Ledger	GENERAL_LEDGER
	Grant and Project	GRANT_VIEW
	Grant Ledger	GRANT_LEDGER
	Grant-Contract and Proposal	PROPOSAL

Subject Area	Business Concept	Primary Fact Table
	Invoice Payable	INVOICE_ITEM
	Operating Ledger	OPERATING_LEDGER
	Operating Ledger Comparison	OPERATING_LEDGER
	Operating Ledger Reconciliation	GENERAL_LEDGER
	Purchasing Payable	PURCHASE_ORDER_ITEM
	Transaction History	TRANSACTION_HISTORY
Financial Aid	Financial Aid Application	FINAID_APPLICANT_STATUS
	Financial Aid Award and Disbursement	AWARD_BY_PERSON
	Financial Aid Fund	AWARD_BY_FUND
	Loan Disbursement	STUDENT
Human Resources	Employee	EMPLOYEE
	Employee and Position	EMPLOYEE
	Human Resource Application	HR_APPLICATION
	Human Resource Faculty	FACULTY
	Payroll	PAYROLL_DOCUMENT
	Personnel Action Audit	PERSONNEL_ACTION
	Position	POSITION_DEFINITION
Student	Active Registration	ENROLLMENT
	Admissions Application	ADMISSIONS_APPLICATION
	Advisor Student List	STUDENT
	Audit Student	STUDENT_EXTENDED
	Course Catalog	COURSE_CATALOG
	Enrollment Management	ENROLLMENT
	Enrollment Management Subset	ENROLLMENT
	Faculty Assignment	FACULTY
	Faculty Subset	FACULTY

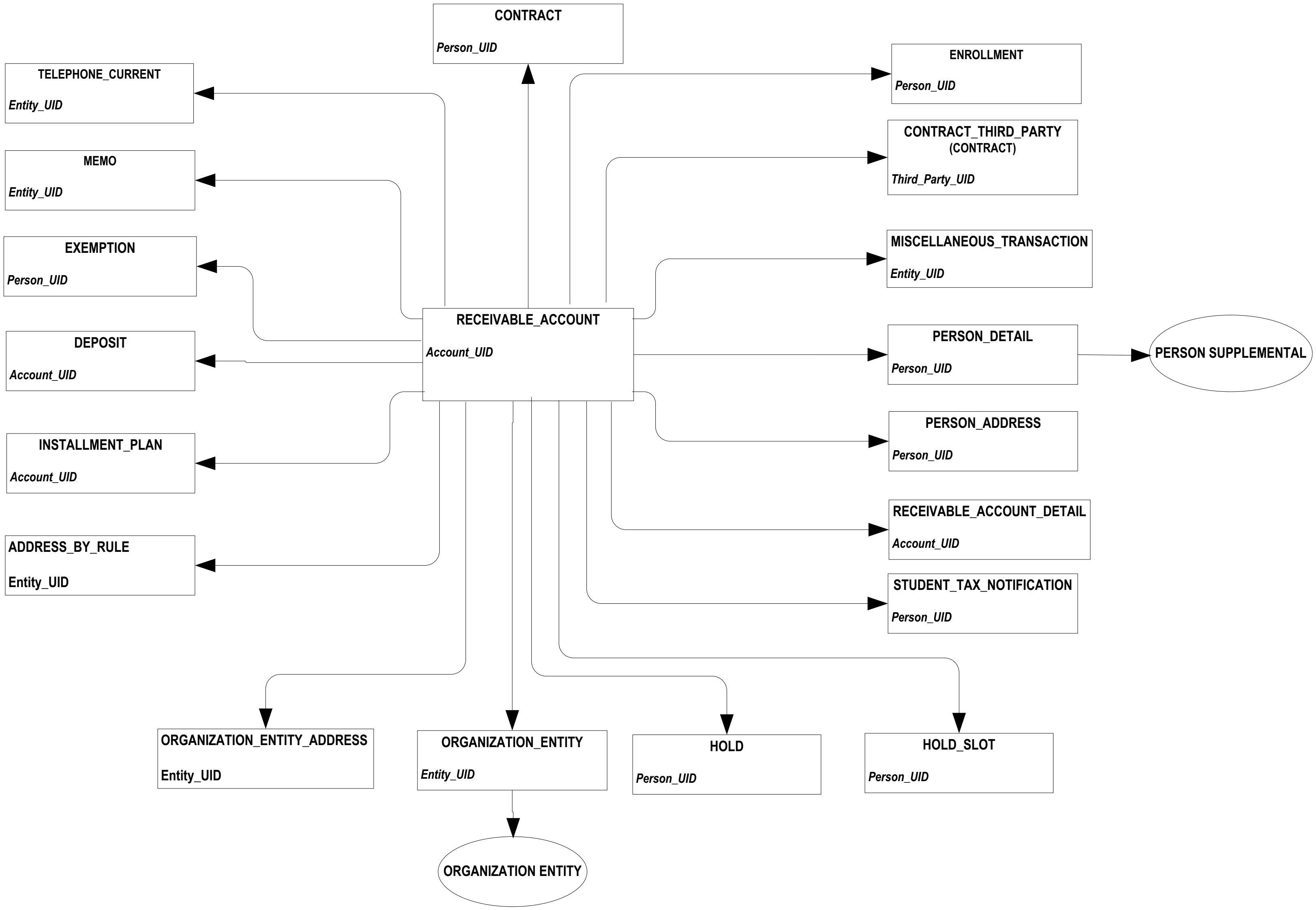
Subject Area	Business Concept	Primary Fact Table
	Government Reporting	GOVERNMENT_STUDENT, GOVERNMENT_FINANCIAL_AID, GOVERMENT_ADMISSIONS
	Recruitment Information	RECRUITMENT_INFORMATION
	Registration Plan	REGISTRATION_PLAN_COURSE
	Residential Life	PERSON_DETAIL
	Schedule Offering	SCHEDULE_OFFERING
	Student Detail	STUDENT
	Student Detail Subset	STUDENT
Travel and Expense	Authorization	AUTHORIZATION
	Reimbursement	REIMBURSEMENT

Business Concept diagrams

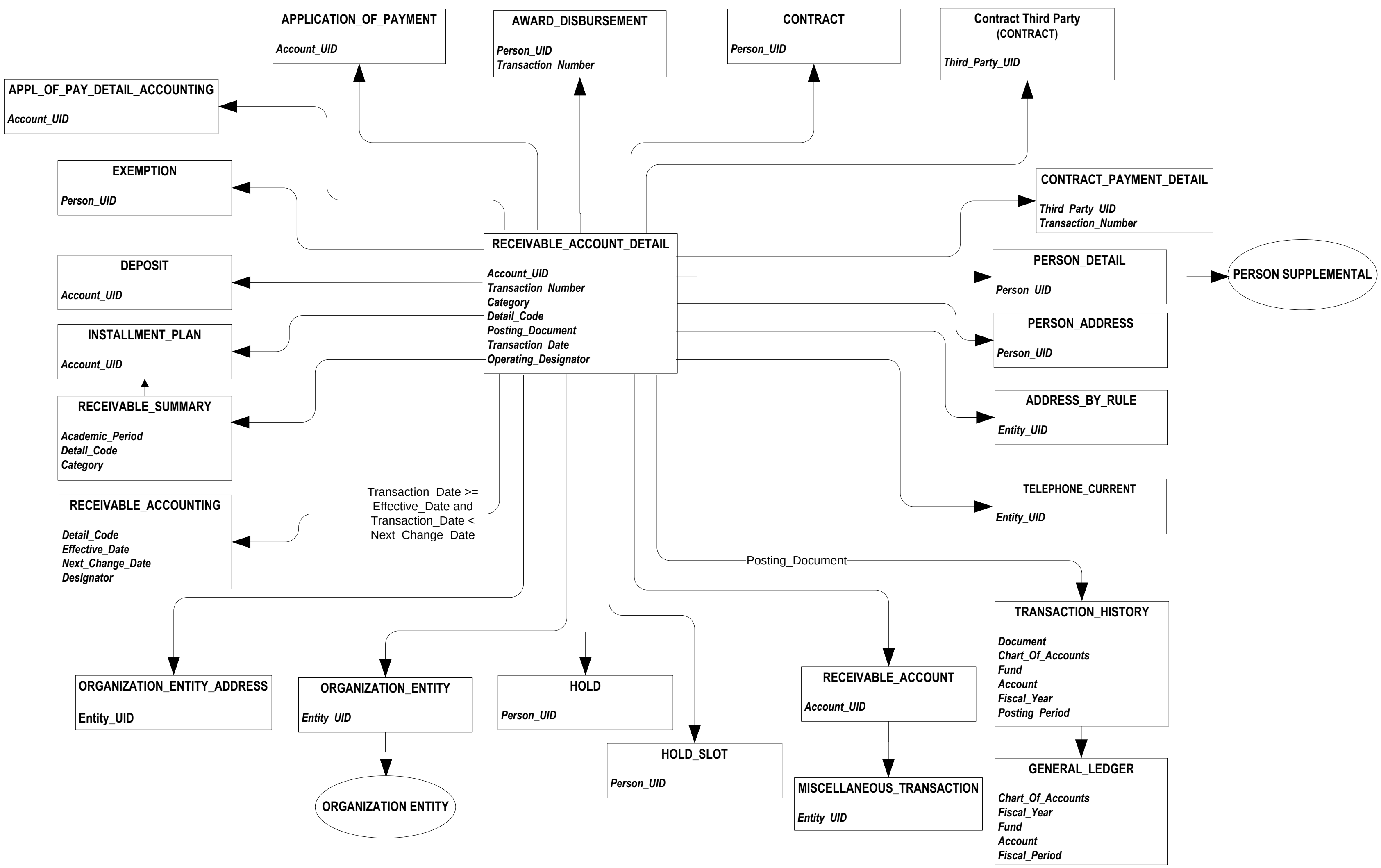
The relationships in the reporting tool meta data for Cognos Business Intelligence and Oracle Business Intelligence Discoverer are the same. Following are the diagrams that show the relationships for the business concepts defined in the Banner ODS. There is one diagram for each business concept. The diagrams are grouped by subject areas such as Accounts Receivable and Advancement. Green objects in a diagram indicate that a query subject, key column, or join was added, changed, or corrected with this release.

Accounts Receivable

Receivable Customer

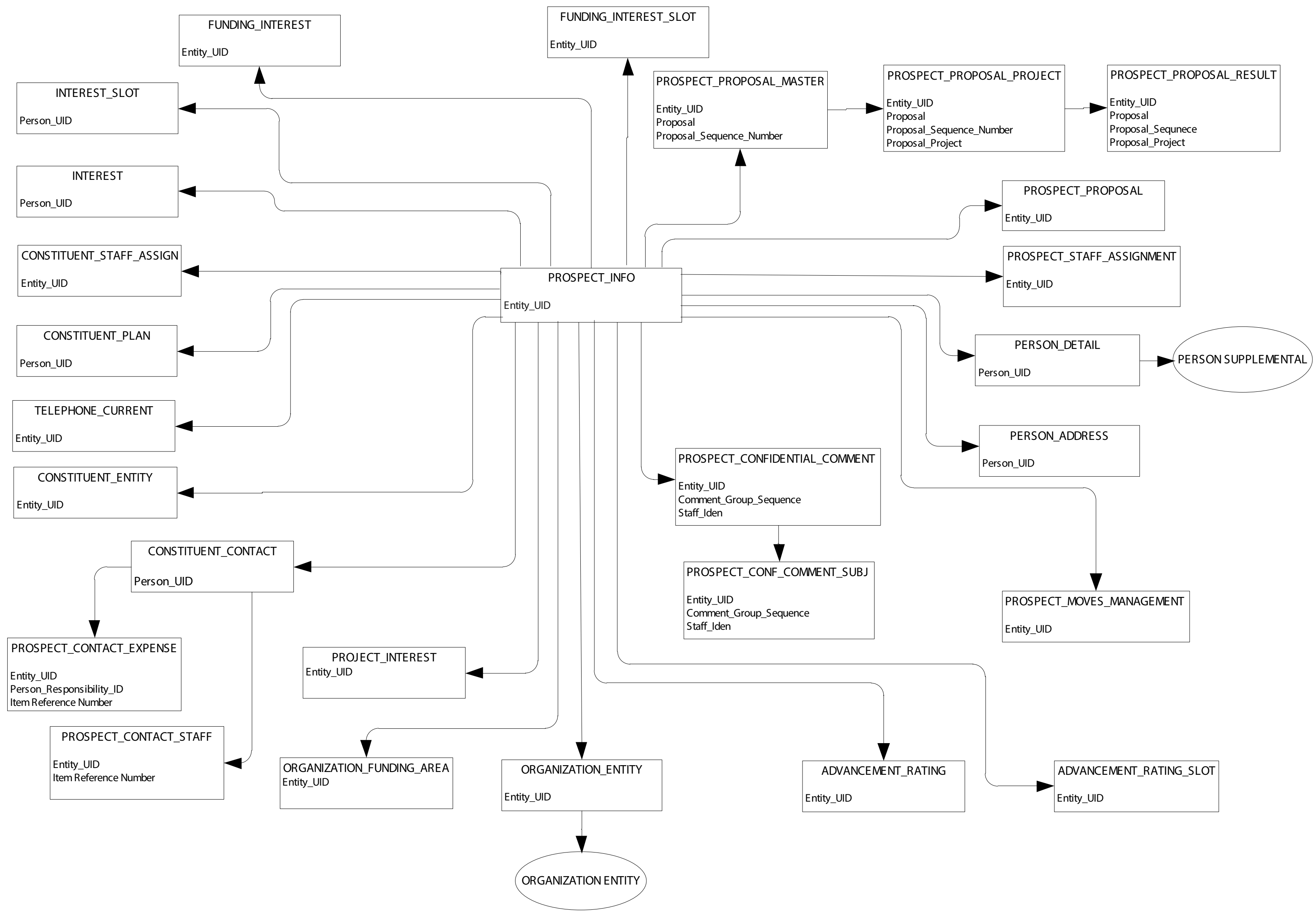

CONTRACT
Person_UID
TELEPHONE_CURRENT
Entity_UID
ENROLLMENT
Person_UID
MEMO
Entity_UID
CONTRACT_THIRD_PARTY
(CONTRACT)
Third_Party_UID
EXEMPTION
Person_UID
MISCELLANEOUS_TRANSACTION
Entity_UID
RECEIVABLE_ACCOUNT
Account_UID
DEPOSIT
Account_UID
PERSON_DETAIL
Person_UID
PERSON SUPPLEMENTAL
INSTALLMENT_PLAN
Account_UID
PERSON_ADDRESS
Person_UID
RECEIVABLE_ACCOUNT_DETAIL
Account_UID
ADDRESS_BY_RULE
Entity_UID
STUDENT_TAX_NOTIFICATION
Person_UID
ORGANIZATION_ENTITY_ADDRESS
Entity_UID
ORGANIZATION_ENTITY
Entity_UID
HOLD
Person_UID
HOLD_SLOT
Person_UID
ORGANIZATION ENTITY

Receivable Revenue

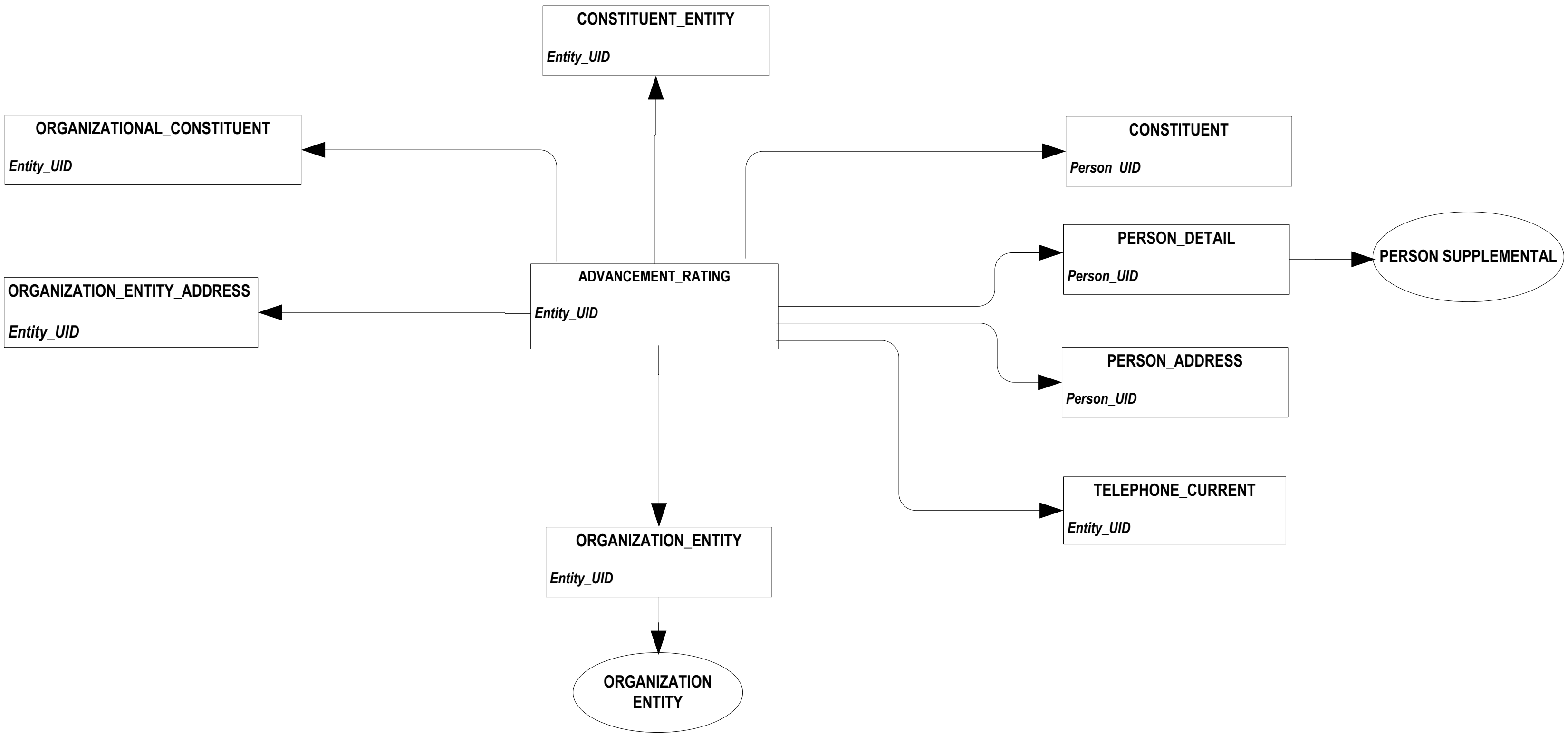


Advancement

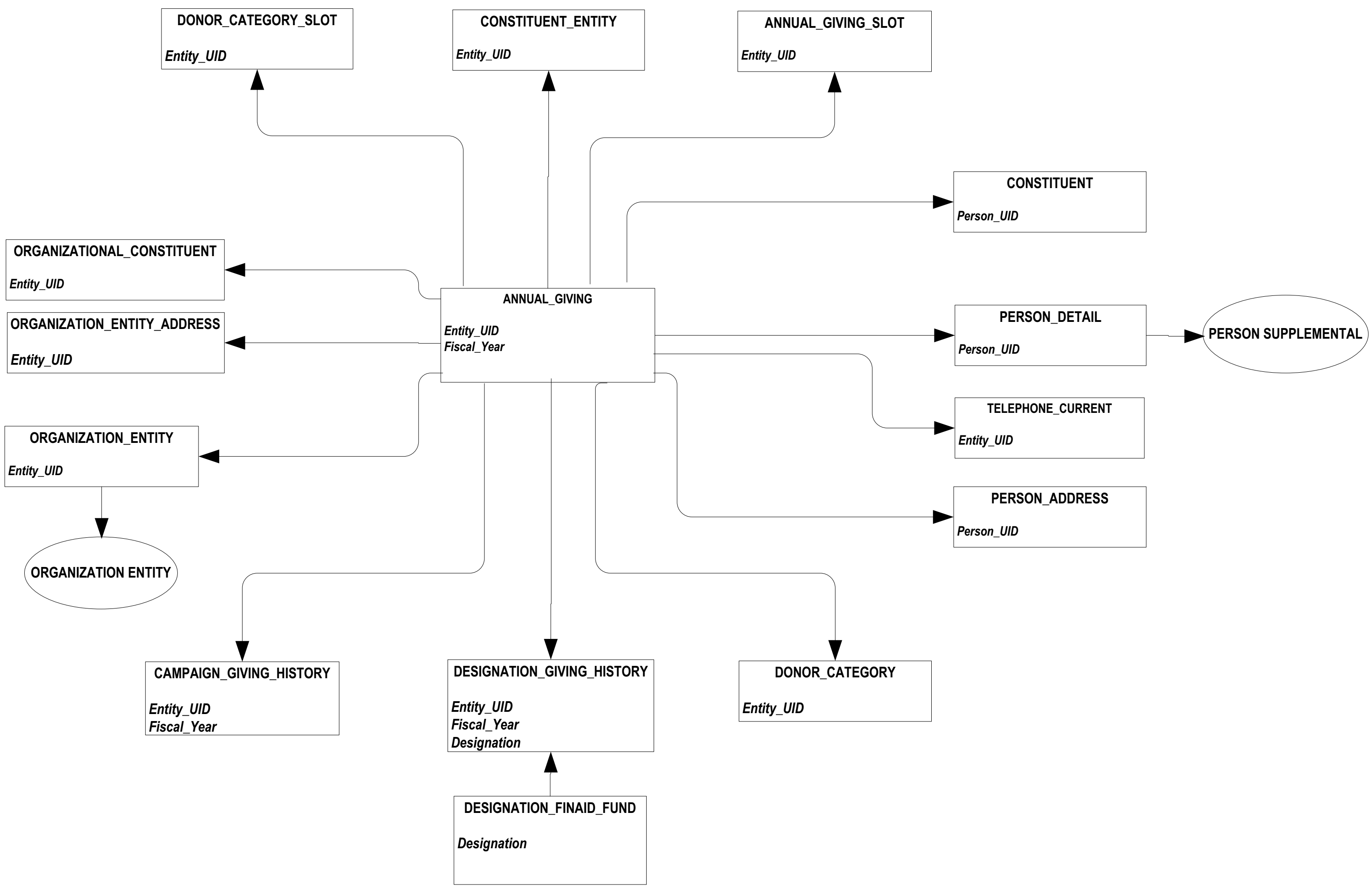
Advancement Prospect


FUNDING_INTEREST
Entity_UID
FUNDING_INTEREST_SLOT
Entity_UID
INTEREST_SLOT
Person_UID
PROSPECT_PROPOSAL_MASTER
Entity_UID
Proposal
Proposal_Sequence_Number
PROSPECT_PROPOSAL_PROJECT
Entity_UID
Proposal
Proposal_Sequence_Number
Proposal_Project
PROSPECT_PROPOSAL_RESULT
Entity_UID
Proposal
Proposal_Sequnece
Proposal_Project
INTEREST
Person_UID
PROSPECT_PROPOSAL
Entity_UID
CONSTITUENT_STAFF_ASSIGN
Entity_UID
PROSPECT_INFO
Entity_UID
PROSPECT_STAFF_ASSIGNMENT
Entity_UID
CONSTITUENT_PLAN
Person_UID
PERSON_DETAIL
Person_UID
PERSON SUPPLEMENTAL
TELEPHONE_CURRENT
Entity_UID
PERSON_ADDRESS
Person_UID
CONSTITUENT_ENTITY
Entity_UID
PROSPECT_CONFIDENTIAL_COMMENT
Entity_UID
Comment_Group_Sequence
Staff_Iden
CONSTITUENT_CONTACT
Person_UID
PROSPECT_CONF_COMMENT_SUBJ
Entity_UID
Comment_Group_Sequence
Staff_Iden
PROSPECT_MOVES_MANAGEMENT
Entity_UID
PROSPECT_CONTACT_EXPENSE
Entity_UID
Person_Responsibility_ID
Item Reference Number
PROJECT_INTEREST
Entity_UID
PROSPECT_CONTACT_STAFF
Entity_UID
Item Reference Number
ORGANIZATION_FUNDING_AREA
Entity_UID
ORGANIZATION_ENTITY
Entity_UID
ADVANCEMENT_RATING
Entity_UID
ADVANCEMENT_RATING_SLOT
Entity_UID
ORGANIZATION ENTITY

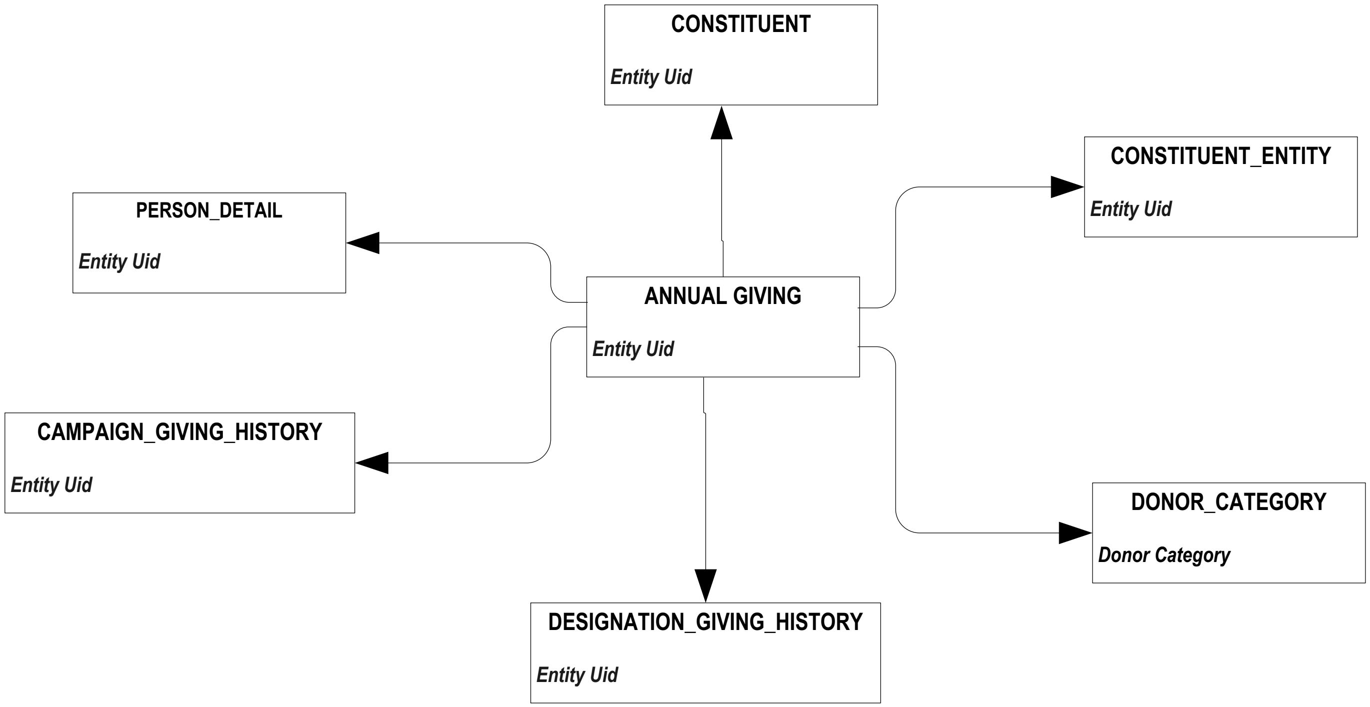
Advancement Rating



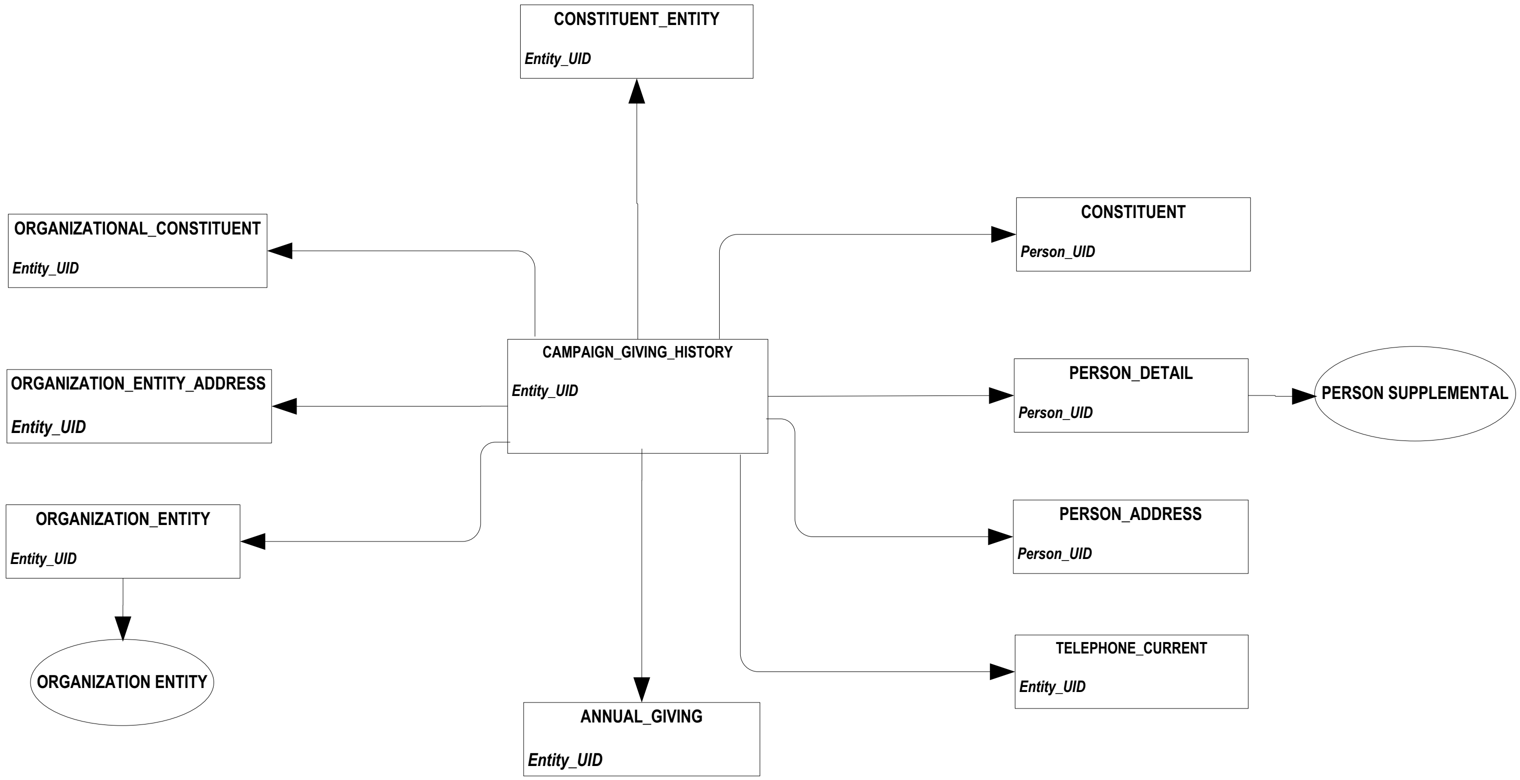
Annual Giving



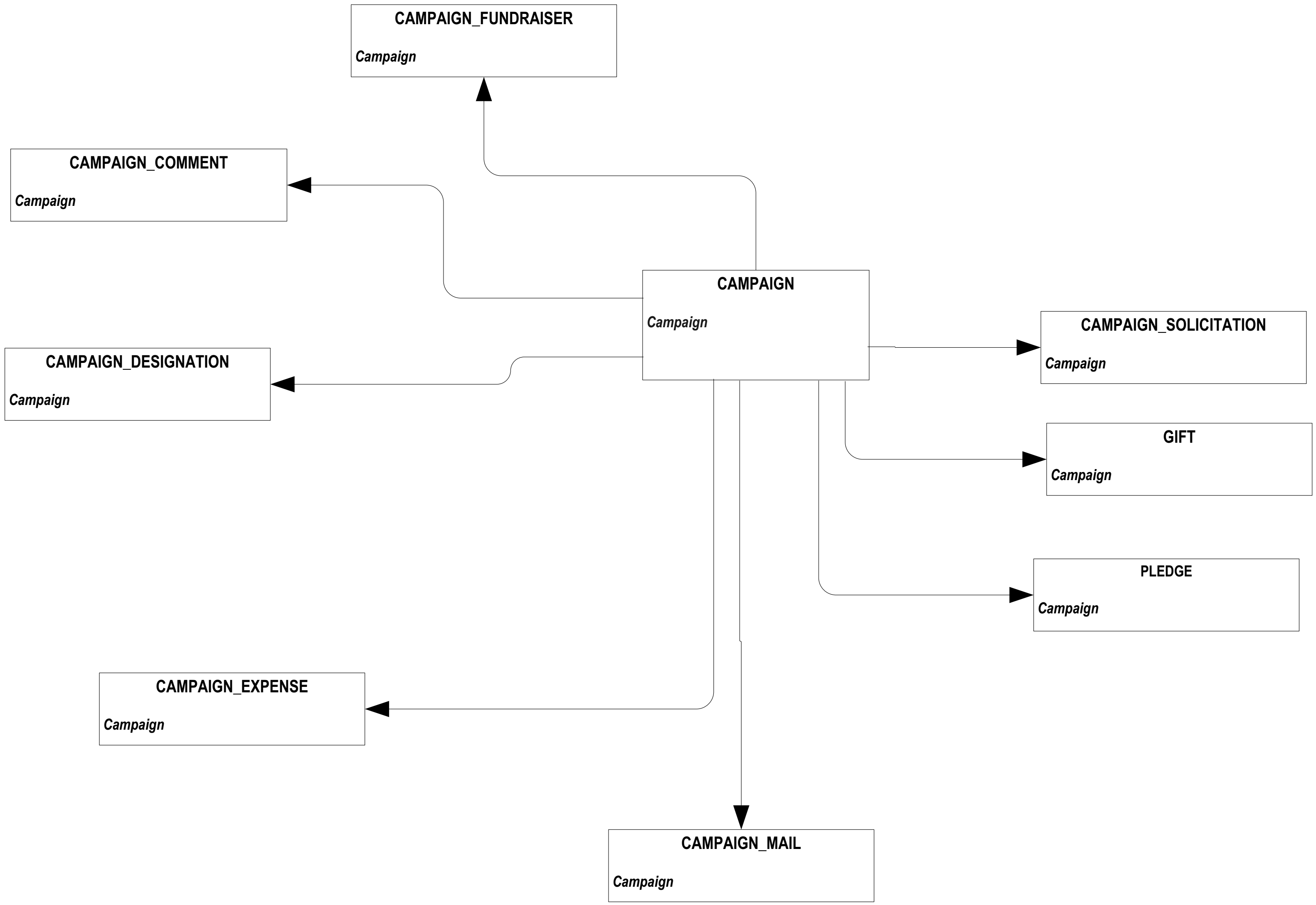
Annual Giving Comparison



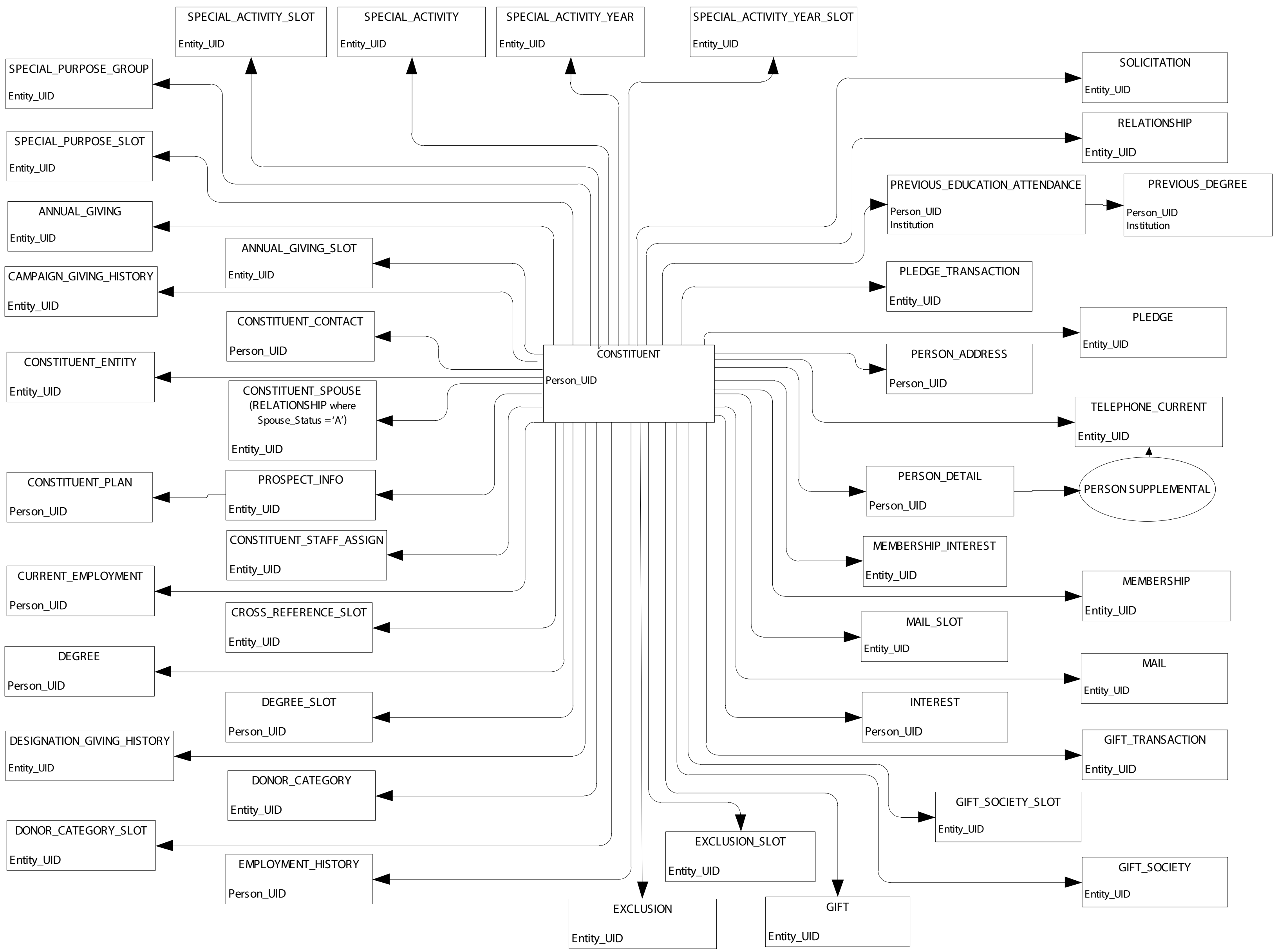
Campaign Giving History



Campaign Management



Constituent


SPECIAL_ACTIVITY_SLOT
Entity_UID
SPECIAL_ACTIVITY
Entity_UID
SPECIAL_ACTIVITY_YEAR
Entity_UID
SPECIAL_ACTIVITY_YEAR_SLOT
Entity_UID
SPECIAL_PURPOSE_GROUP
Entity_UID
SPECIAL_PURPOSE_SLOT
Entity_UID
ANNUAL_GIVING
Entity_UID
ANNUAL_GIVING_SLOT
Entity_UID
CAMPAIGN_GIVING_HISTORY
Entity_UID
CONSTITUENT_CONTACT
Person_UID
CONSTITUENT_ENTITY
Entity_UID
CONSTITUENT_SPOUSE
(RELATIONSHIP where
Spouse_Status = 'A')
Entity_UID
CONSTITUENT_PLAN
Person_UID
PROSPECT_INFO
Entity_UID
CONSTITUENT_STAFF_ASSIGN
Entity_UID
CURRENT_EMPLOYMENT
Person_UID
CROSS_REFERENCE_SLOT
Entity_UID
DEGREE
Person_UID
DEGREE_SLOT
Person_UID
DESIGNATION_GIVING_HISTORY
Entity_UID
DONOR_CATEGORY
Entity_UID
DONOR_CATEGORY_SLOT
Entity_UID
EMPLOYMENT_HISTORY
Person_UID
CONSTITUENT
Person_UID
EXCLUSION
Entity_UID
EXCLUSION_SLOT
Entity_UID
GIFT
Entity_UID
SOLICITATION
Entity_UID
RELATIONSHIP
Entity_UID
PREVIOUS_EDUCATION_ATTENDANCE
Person_UID
Institution
PREVIOUS_DEGREE
Person_UID
Institution
PLEDGE_TRANSACTION
Entity_UID
PLEDGE
Entity_UID
PERSON_ADDRESS
Person_UID
TELEPHONE_CURRENT
Entity_UID
PERSON_DETAIL
Person_UID
PERSON SUPPLEMENTAL
MEMBERSHIP_INTEREST
Entity_UID
MEMBERSHIP
Entity_UID
MAIL_SLOT
Entity_UID
MAIL
Entity_UID
INTEREST
Person_UID
GIFT_TRANSACTION
Entity_UID
GIFT_SOCIETY_SLOT
Entity_UID
GIFT_SOCIETY
Entity_UID

Determinants for Constituent:

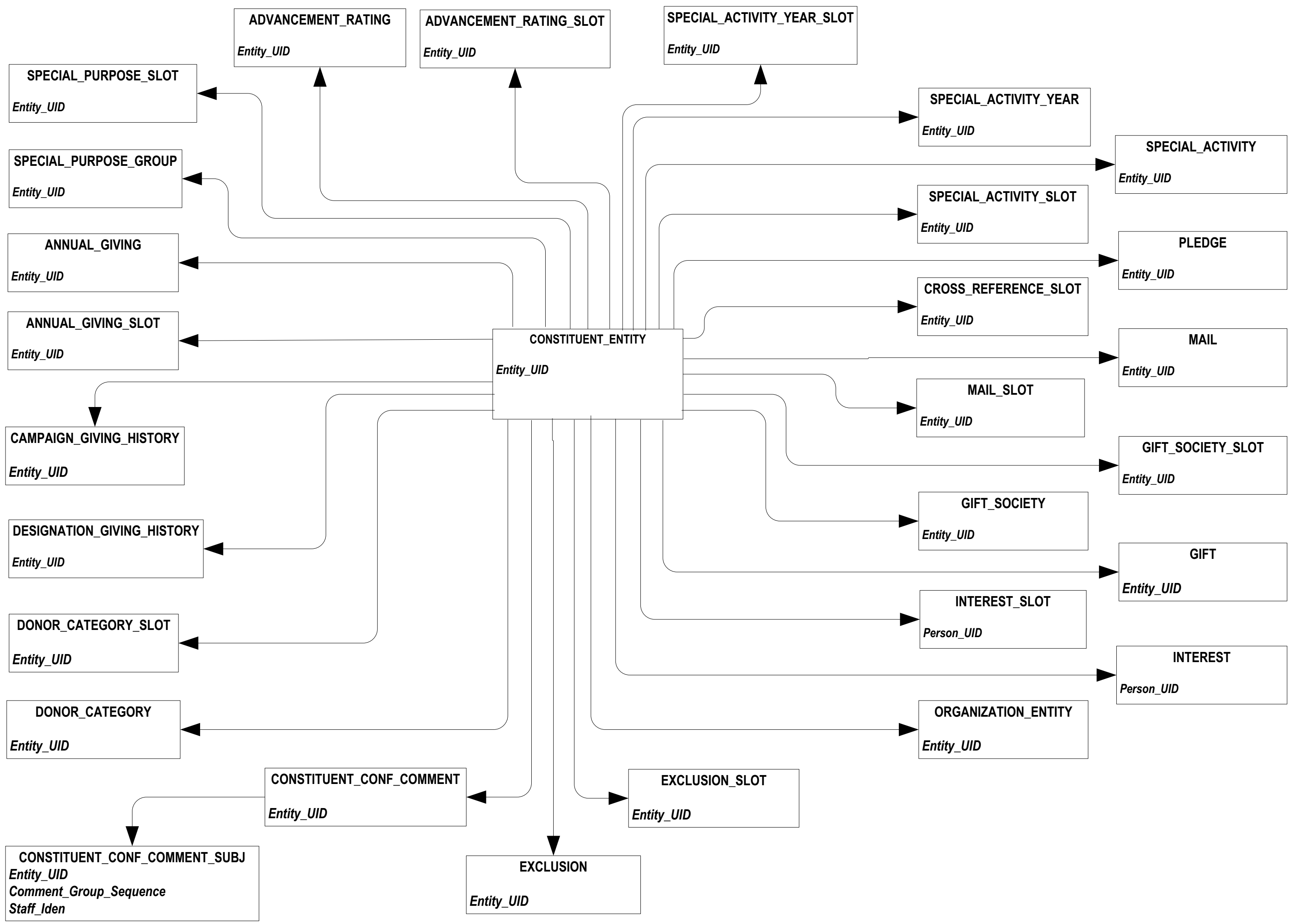
Query Subject	Determinant Name	Determinant Columns
Constituent	UK_CONSTITUENT	Person_UID
Annual Giving	UK_ANNUAL_GIVING	Person_UID Fiscal_Year
Annual Giving Slot	UK_ANNUAL_GIVING_SLOT	Person_UID
Campaign Giving History	UK_CAMPAIGN_GIVING_HISTORY	Entity_UID Campaign Fiscal_Year
Constituent Contact	UK_CONSTITUENT_CONTACT	Person_UID Item_Ref_Number
Constituent Entity	UK_CONSTITUENT_ENTITY	Entity_UID
Current Employment	UK_CONSTITUENT_ENTITY	Person_UID Employment_Order
Designation Giving History	UK_DESIGNATION_GIVING_HISTORY	Entity_UID Designation Fiscal_Year

Query Subject	Determinant Name	Determinant Columns
Employment History	NUK_EMPLOYMENT_HISTORY	Person_UID Employment_Order Start_Date Employer_Category
Gift	UK_GIFT	Entity_UID Gift_Number Pledge_Number Campaign Designation
Gift Society	UK_GIFT_SOCIETY	Entity_UID Gift_Society_Year Gift_Society
Gift Society Slot	UK_GIFT_SOCIETY_SLOT	Entity_UID Profile_Code Gift_Society_Rule
Gift Transaction	UK_GIFT_TRANSACTION	Entity_UID Gift_Number
Membership	UK_MEMBERSHIP	Entity_UID Membership_Program Membership_Number

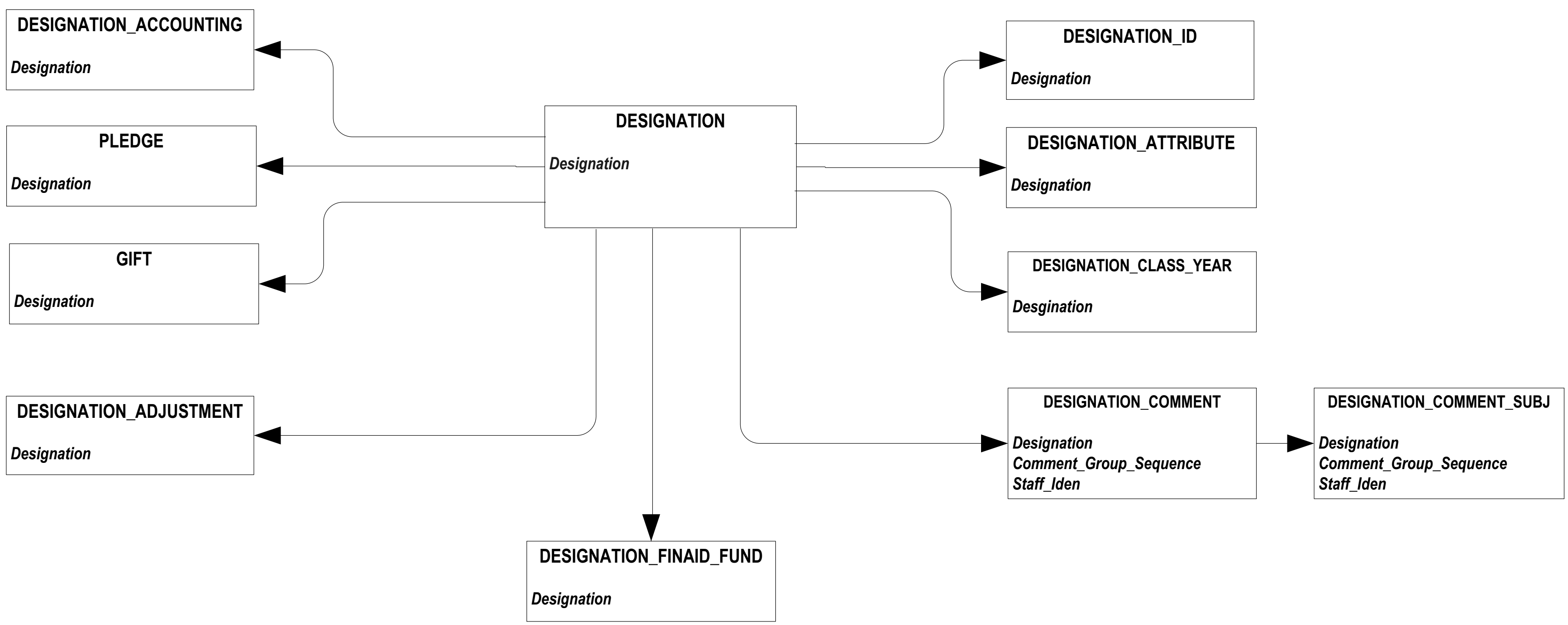
Query Subject	Determinant Name	Determinant Columns
Membership Interest	UK_MEMBERSHIP_INTEREST	Entity_UID Membership_Program Membership_Number Interest
Person Detail	UK_PERSON_DETAIL	Person_UID
Pledge	UK_PLEDGE	Person_UID Pledge_Number Campaign Designation
Pledge Transaction	UK_PLEDGE_TRANSACTION	Person_UID Pledge_Number
Previous Degree	UK_PREVIOUS_DEGREE	Person_UID Institution Sequence_Number
Previous Education Attendance	UK_PREVIOUS_EDUCATION_ATTENDANCE	Person_UID Institution Sequence_Number
Prospect Info	UK_PROSPECT_INFO	Entity_UID

Query Subject	Determinant Name	Determinant Columns
Solicitation	UK_SOLICITATION	Entity_UID
		Gift_Number
		Pledge_Number
		Campaign
		Solicitation_Type
		Solicitor_Organization
		Solitictor_UID
Special Activity	NUK_SPECIAL_ACTIVITY	Entity_UID
		Special_Activity
		Leadership_Role
		Leadership_Activity_Begin_Date
Special Activity Slot	UK_SPECIAL_ACTIVITY_SLOT	Entity_UID
		Profile_Code
		Special_Activity_Rule

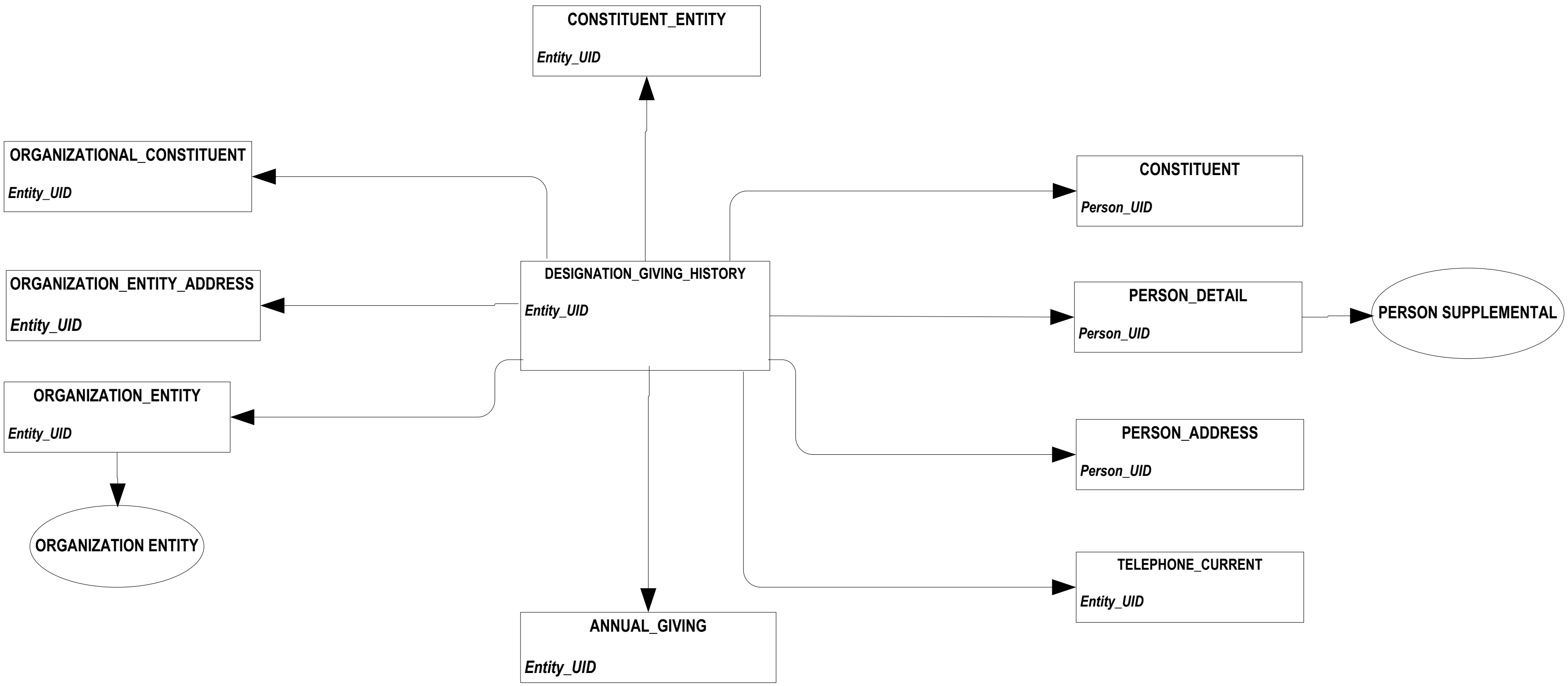
Constituent Entity



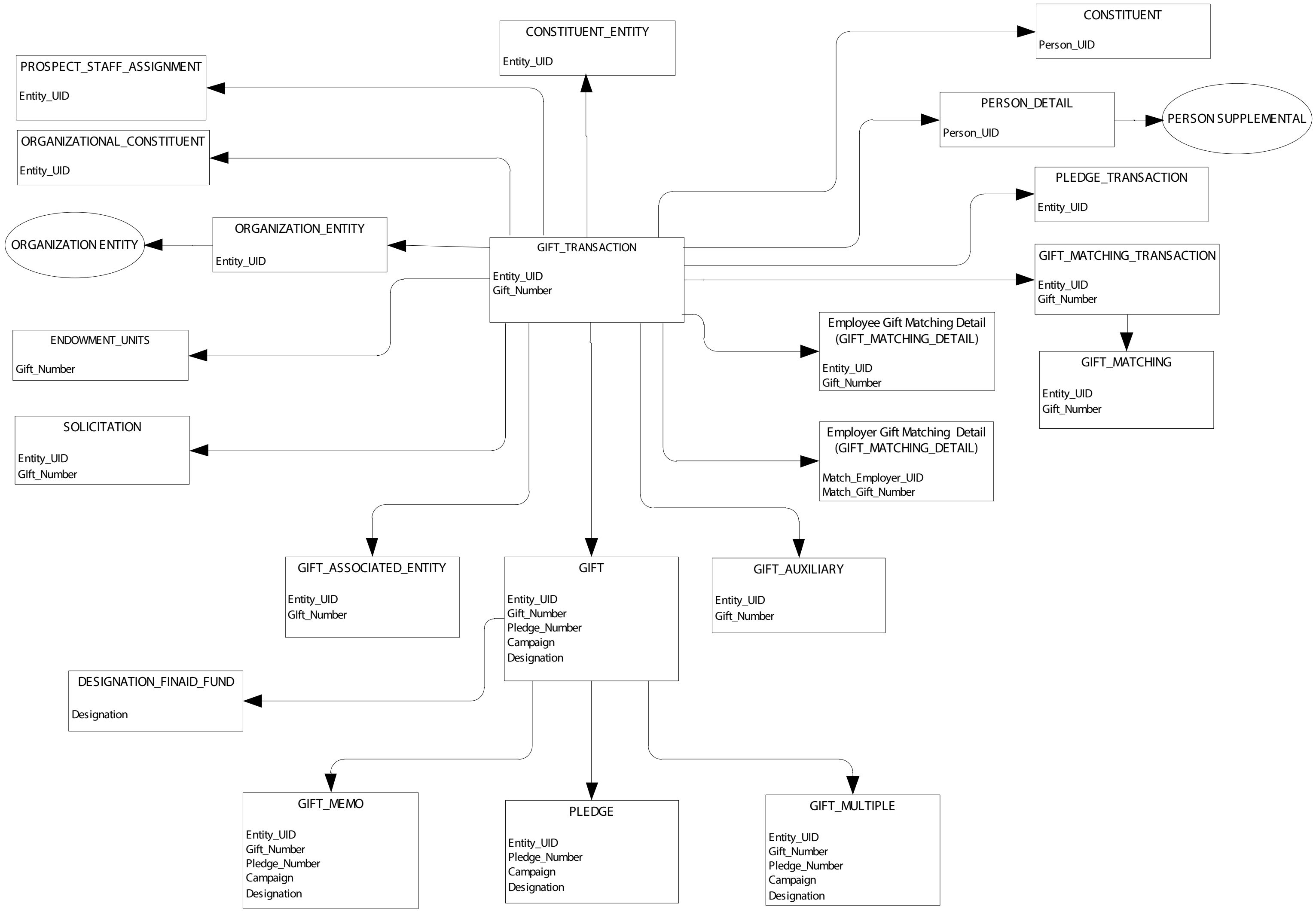
Designation



Designation Giving History

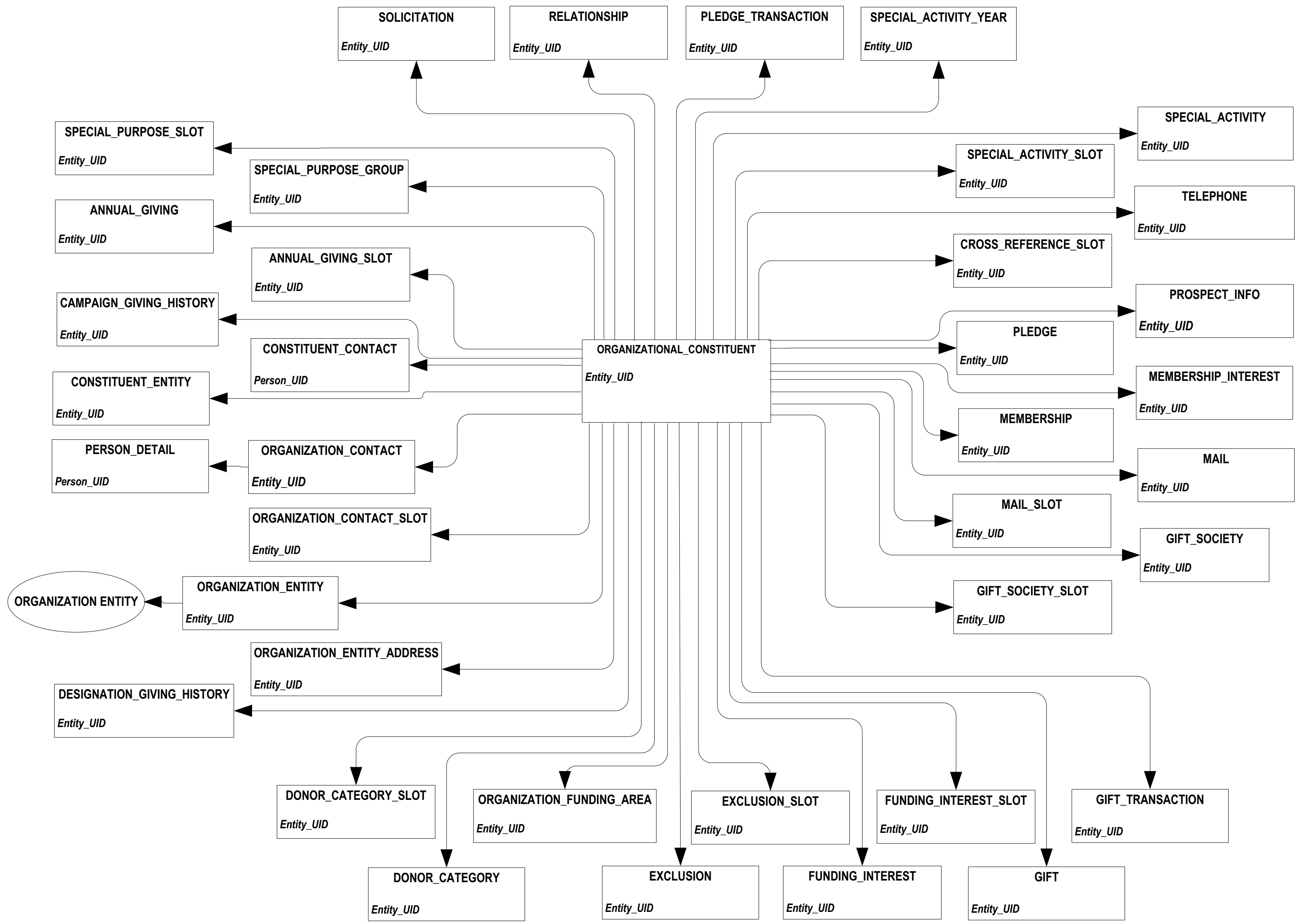


Gift

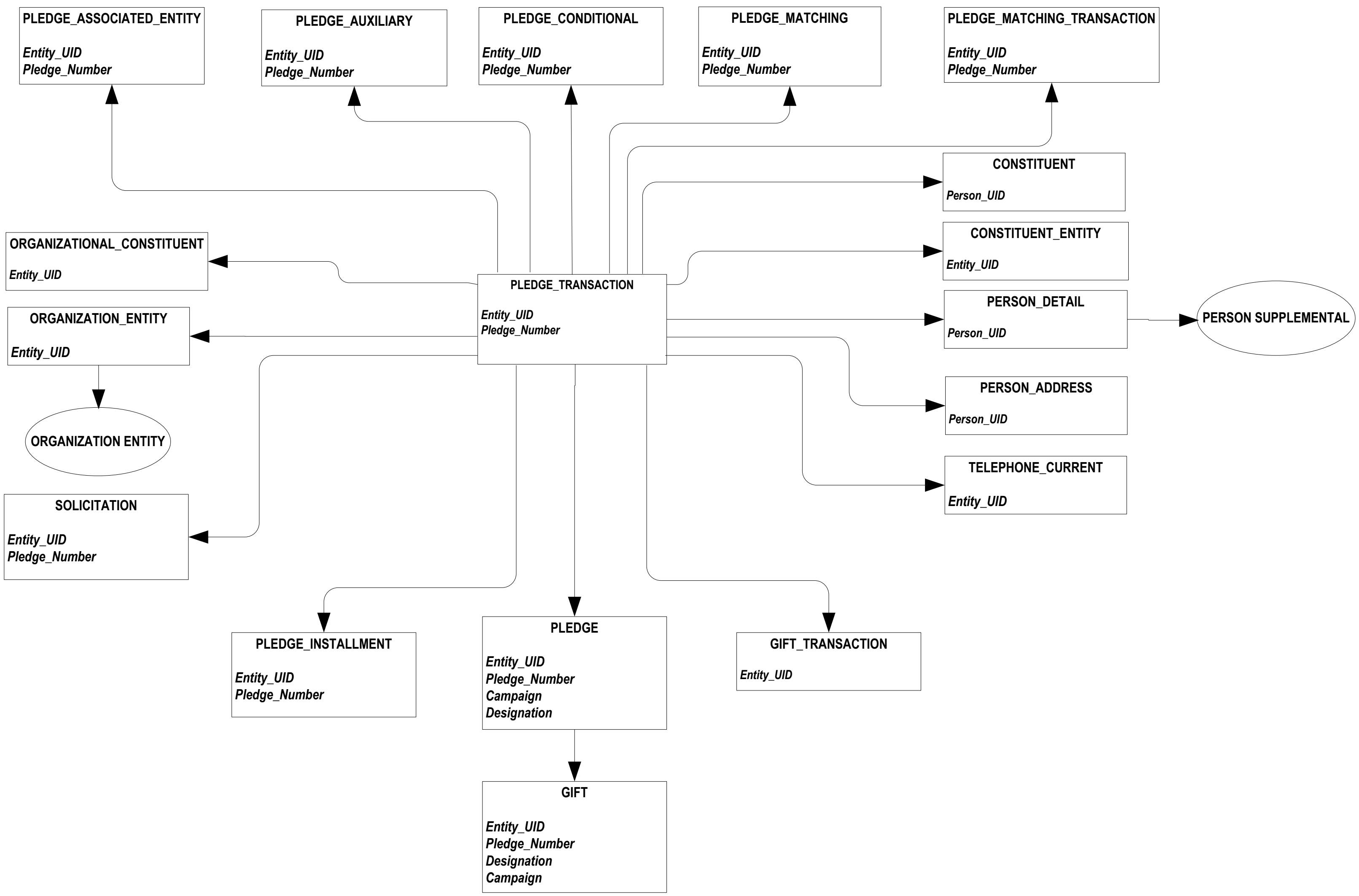


CONSTITUENT_ENTITY
Entity_UID
CONSTITUENT
Person_UID
PROSPECT_STAFF_ASSIGNMENT
Entity_UID
PERSON_DETAIL
Person_UID
PERSON SUPPLEMENTAL
ORGANIZATIONAL_CONSTITUENT
Entity_UID
PLEDGE_TRANSACTION
Entity_UID
ORGANIZATION ENTITY
ORGANIZATION_ENTITY
Entity_UID
GIFT_TRANSACTION
Entity_UID
Gift_Number
GIFT_MATCHING_TRANSACTION
Entity_UID
Gift_Number
ENDOWMENT_UNITS
Gift_Number
Employee Gift Matching Detail (GIFT_MATCHING_DETAIL)
Entity_UID
Gift_Number
GIFT_MATCHING
Entity_UID
Gift_Number
SOLICITATION
Entity_UID
Gift_Number
Employer Gift Matching Detail (GIFT_MATCHING_DETAIL)
Match_Employer_UID
Match_Gift_Number
GIFT_ASSOCIATED_ENTITY
Entity_UID
Gift_Number
GIFT
Entity_UID
Gift_Number
Pledge_Number
Campaign
Designation
GIFT_AUXILIARY
Entity_UID
Gift_Number
DESIGNATION_FINAID_FUND
Designation
GIFT_MEMO
Entity_UID
Gift_Number
Pledge_Number
Campaign
Designation
PLEDGE
Entity_UID
Pledge_Number
Campaign
Designation
GIFT_MULTIPLE
Entity_UID
Gift_Number
Pledge_Number
Campaign
Designation

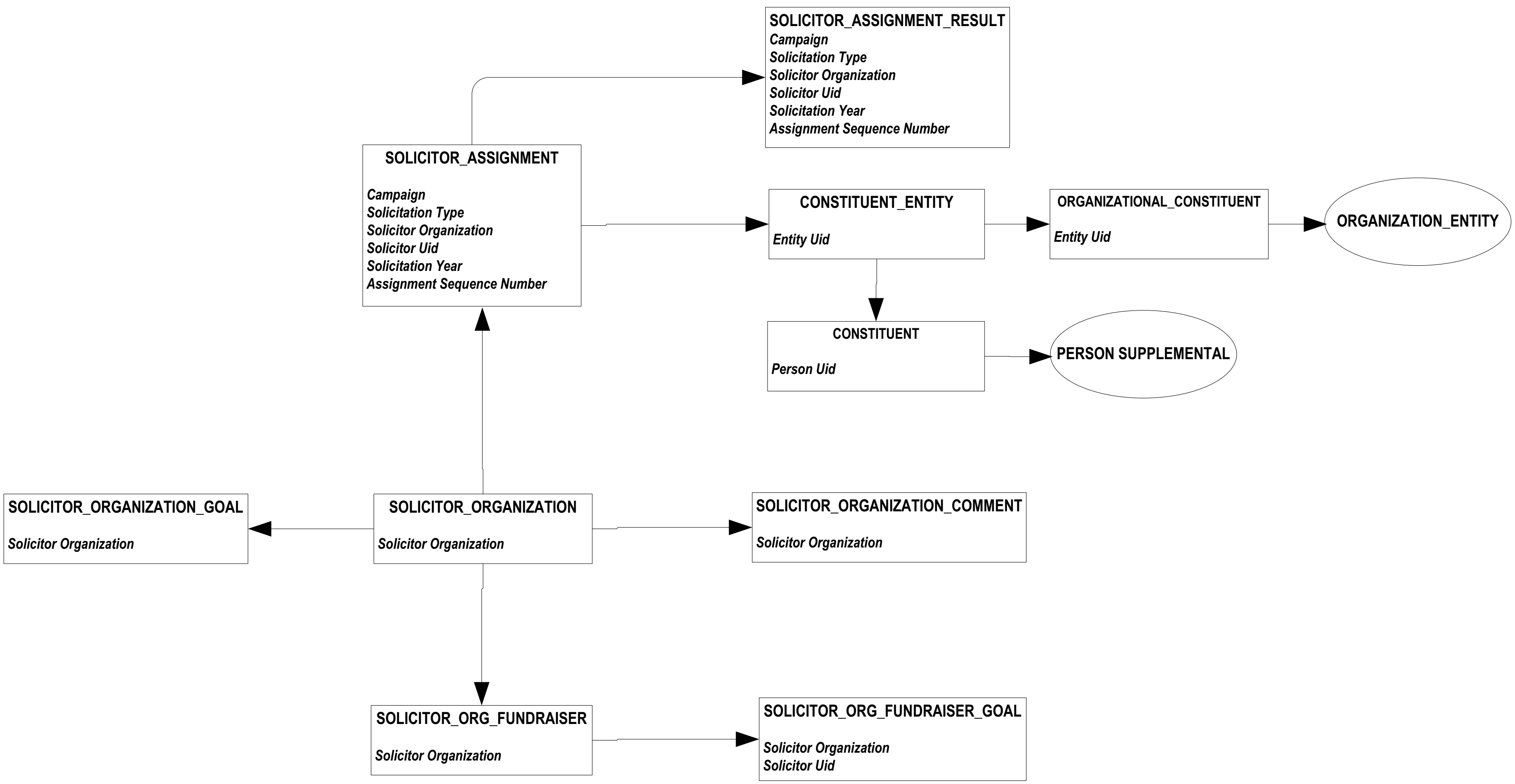
Organizational Constituent



Pledge

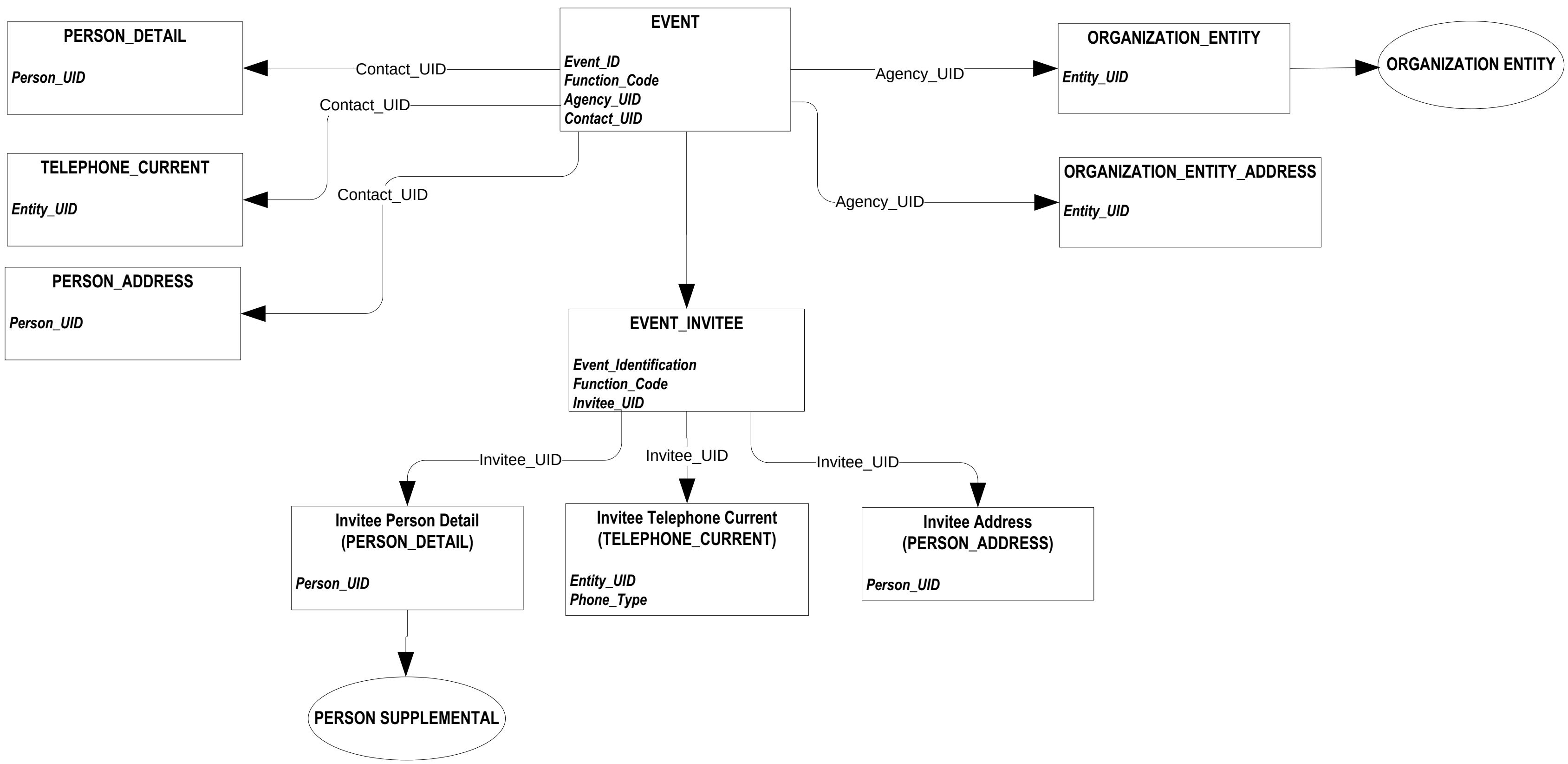

PLEDGE_ASSOCIATED_ENTITY
Entity_UID
Pledge_Number
PLEDGE_AUXILIARY
Entity_UID
Pledge_Number
PLEDGE_CONDITIONAL
Entity_UID
Pledge_Number
PLEDGE_MATCHING
Entity_UID
Pledge_Number
PLEDGE_MATCHING_TRANSACTION
Entity_UID
Pledge_Number
CONSTITUENT
Person_UID
CONSTITUENT_ENTITY
Entity_UID
ORGANIZATIONAL_CONSTITUENT
Entity_UID
PLEDGE_TRANSACTION
Entity_UID
Pledge_Number
PERSON_DETAIL
Person_UID
PERSON SUPPLEMENTAL
ORGANIZATION_ENTITY
Entity_UID
ORGANIZATION ENTITY
PERSON_ADDRESS
Person_UID
TELEPHONE_CURRENT
Entity_UID
SOLICITATION
Entity_UID
Pledge_Number
PLEDGE_INSTALLMENT
Entity_UID
Pledge_Number
PLEDGE
Entity_UID
Pledge_Number
Campaign
Designation
GIFT_TRANSACTION
Entity_UID
GIFT
Entity_UID
Pledge_Number
Designation
Campaign

Solicitation Effort

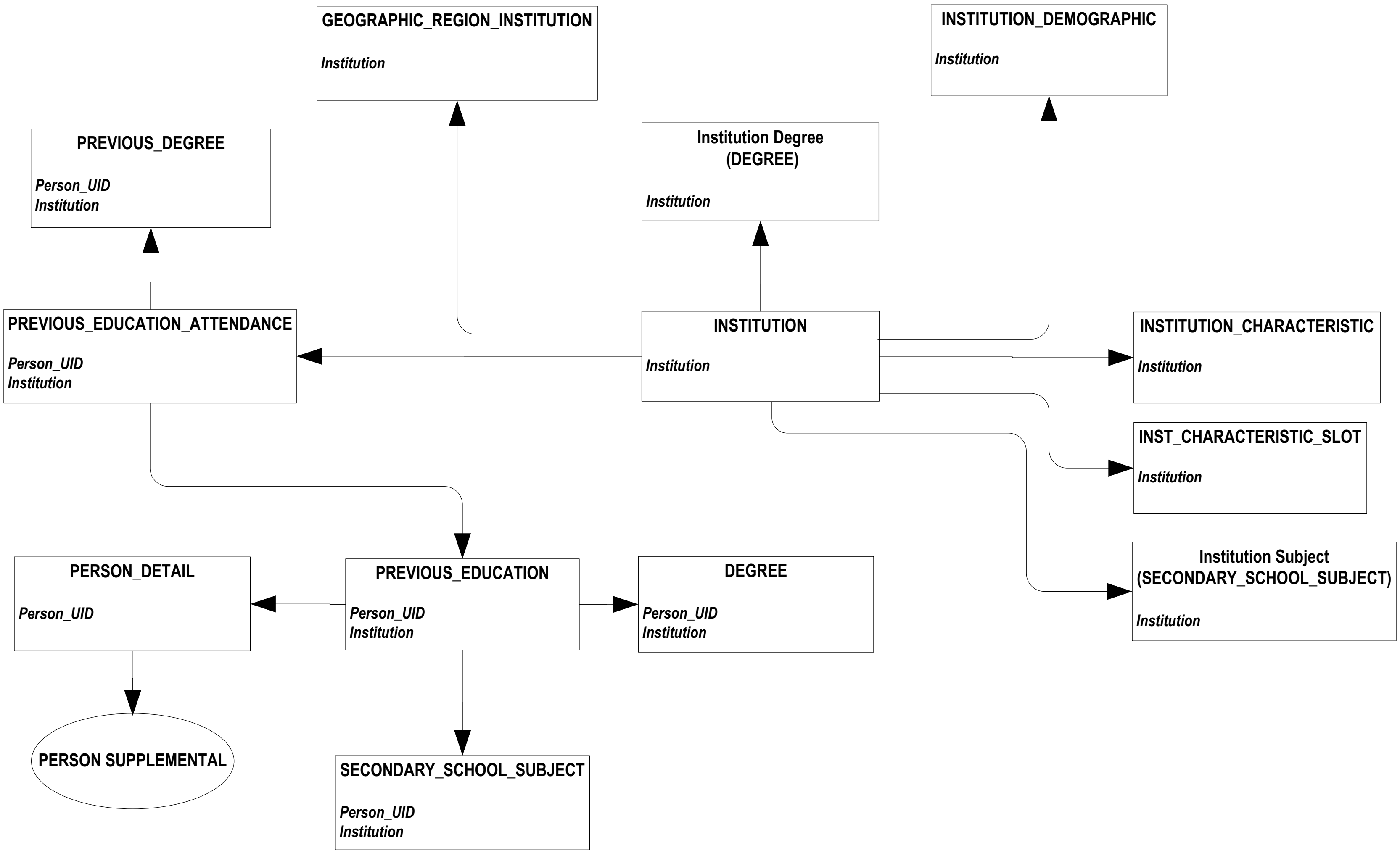


Common

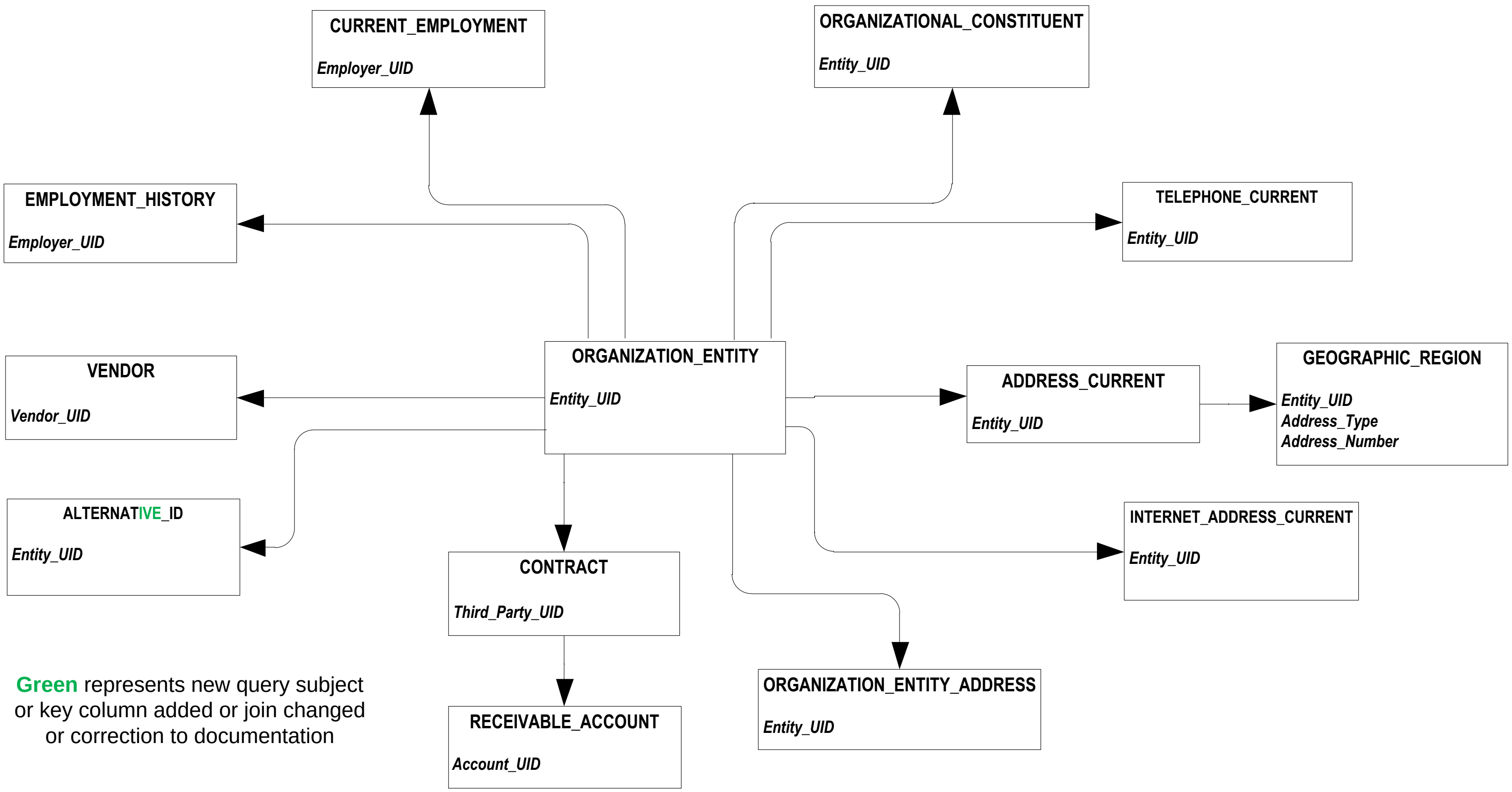
Event



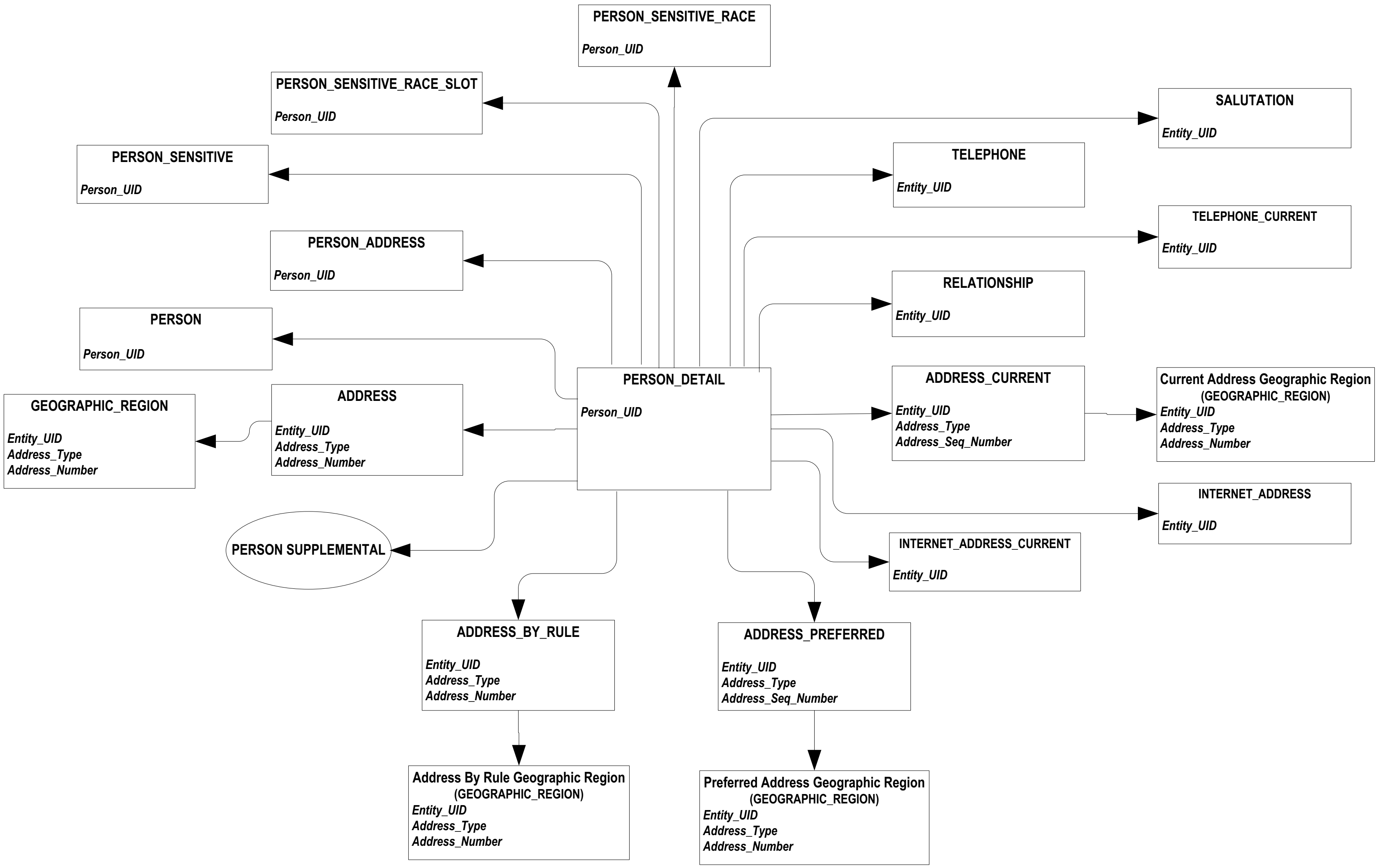
Institution



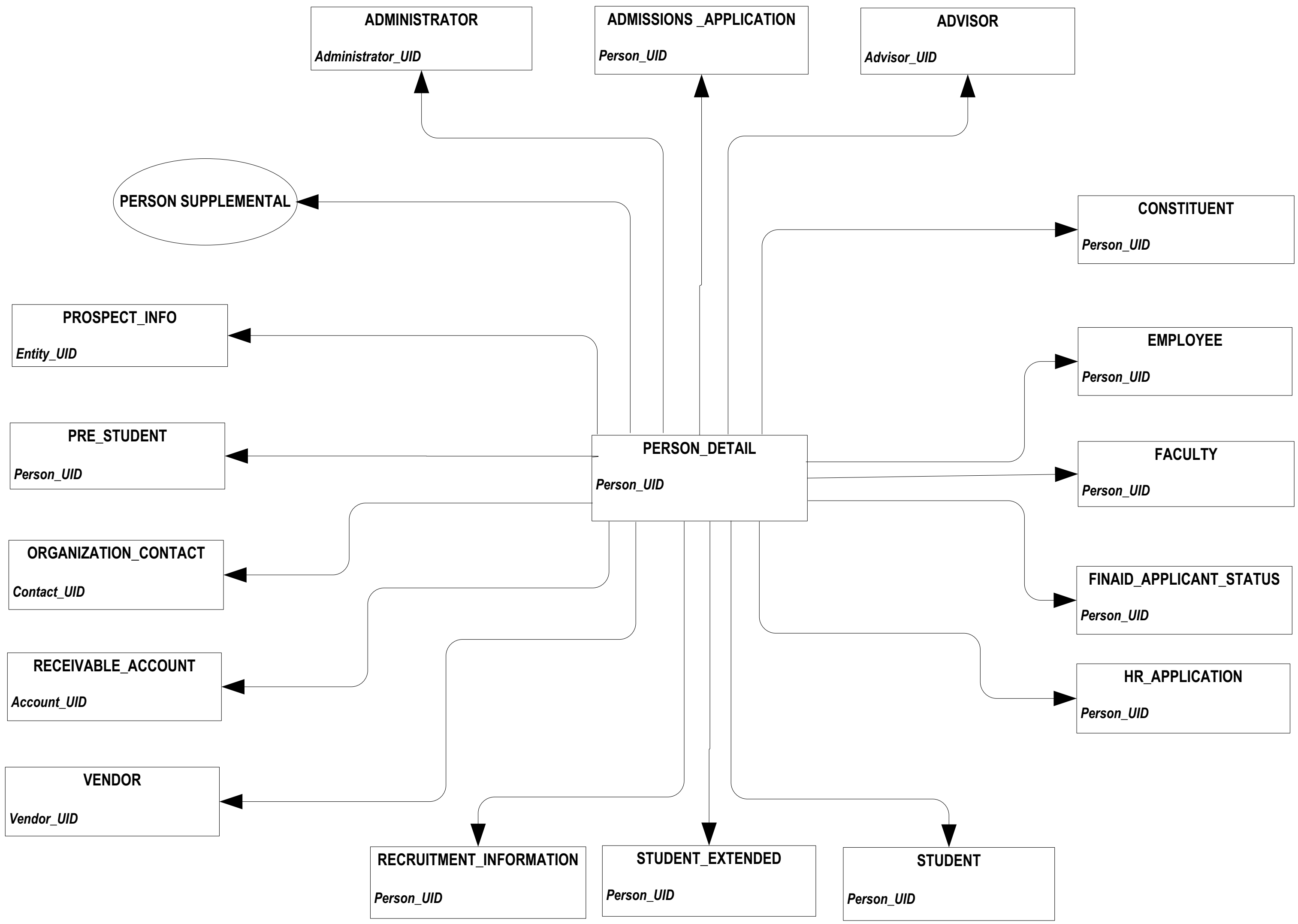
Organization Entity



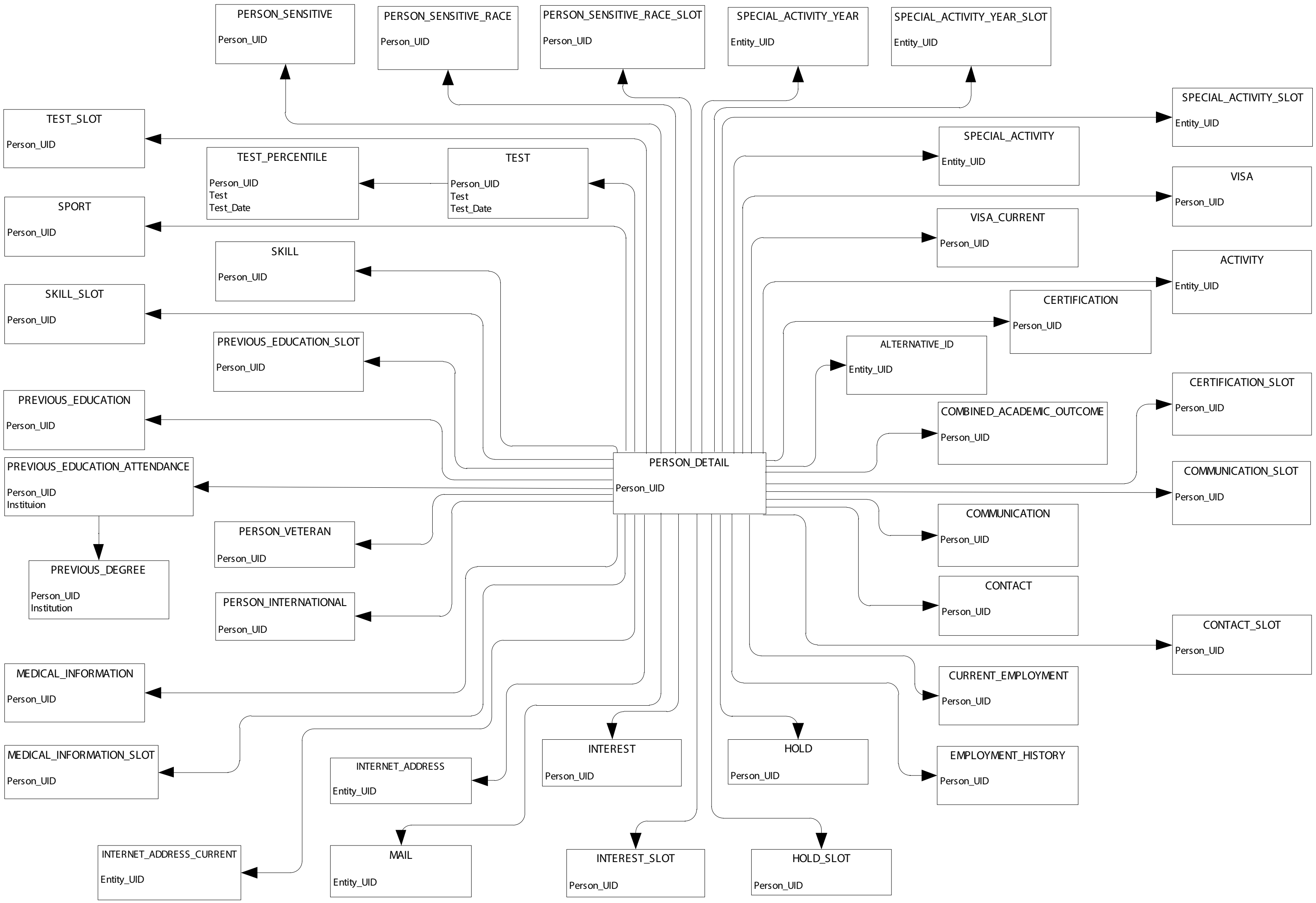
Person Demographic



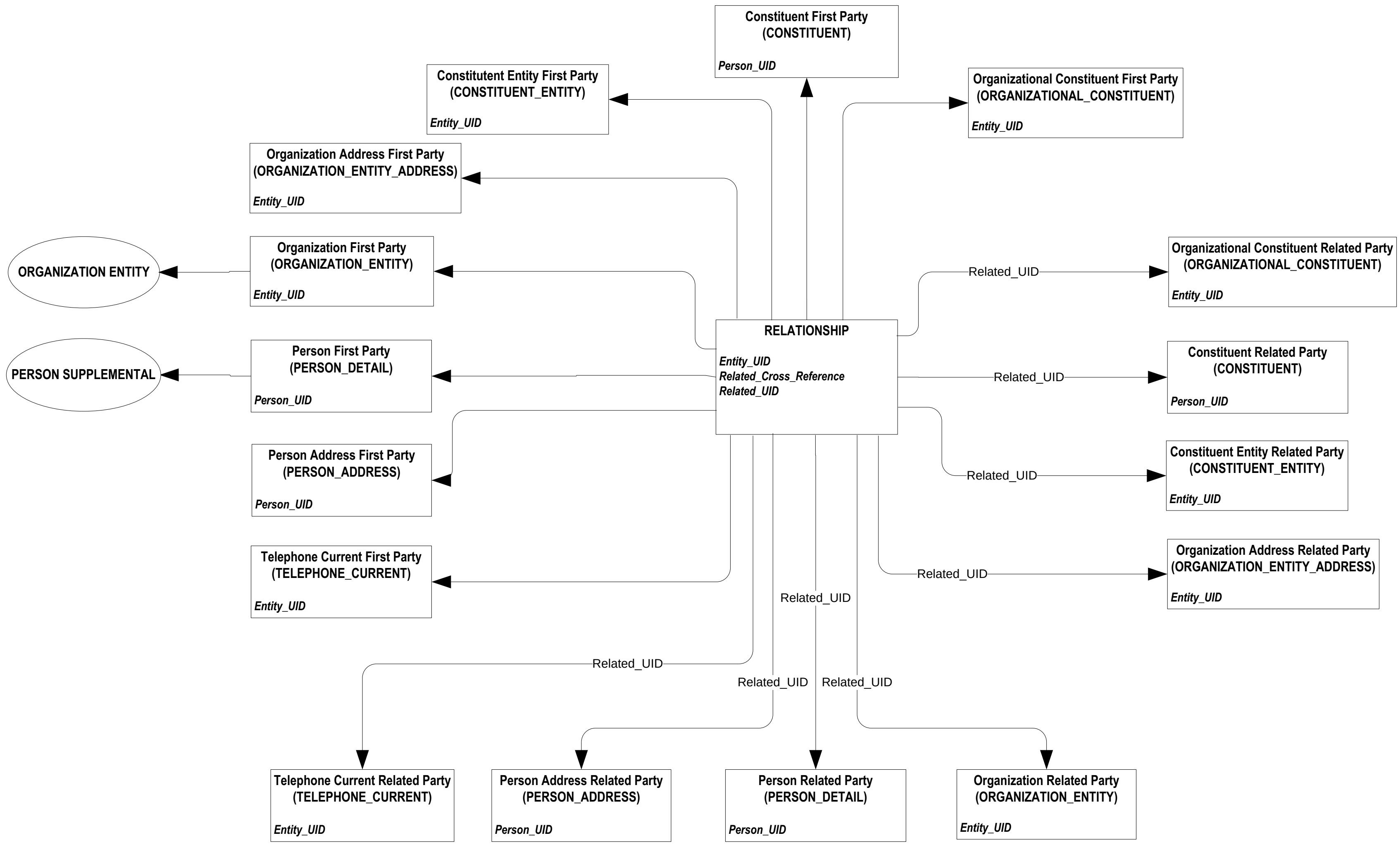
Person Role


ADMINISTRATOR
Administrator_UID
ADMISSIONS _APPLICATION
Person_UID
ADVISOR
Advisor_UID
PERSON SUPPLEMENTAL
CONSTITUENT
Person_UID
PROSPECT_INFO
Entity_UID
EMPLOYEE
Person_UID
PRE_STUDENT
Person_UID
PERSON_DETAIL
Person_UID
FACULTY
Person_UID
ORGANIZATION_CONTACT
Contact_UID
FINAID_APPLICANT_STATUS
Person_UID
RECEIVABLE_ACCOUNT
Account_UID
HR_APPLICATION
Person_UID
VENDOR
Vendor_UID
RECRUITMENT_INFORMATION
Person_UID
STUDENT_EXTENDED
Person_UID
STUDENT
Person_UID

Person Supplemental

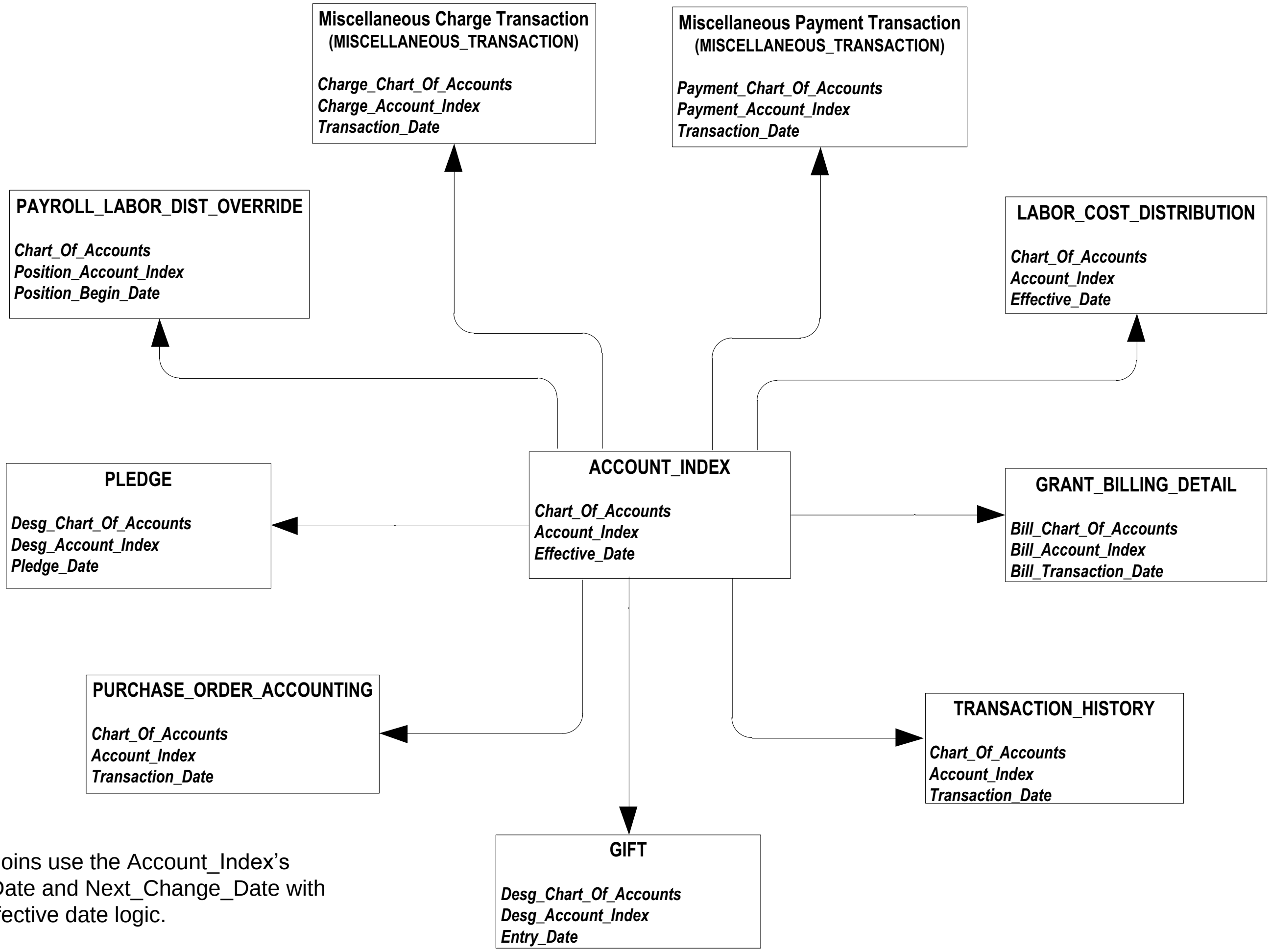


Relationship



Finance

Account Index Audit



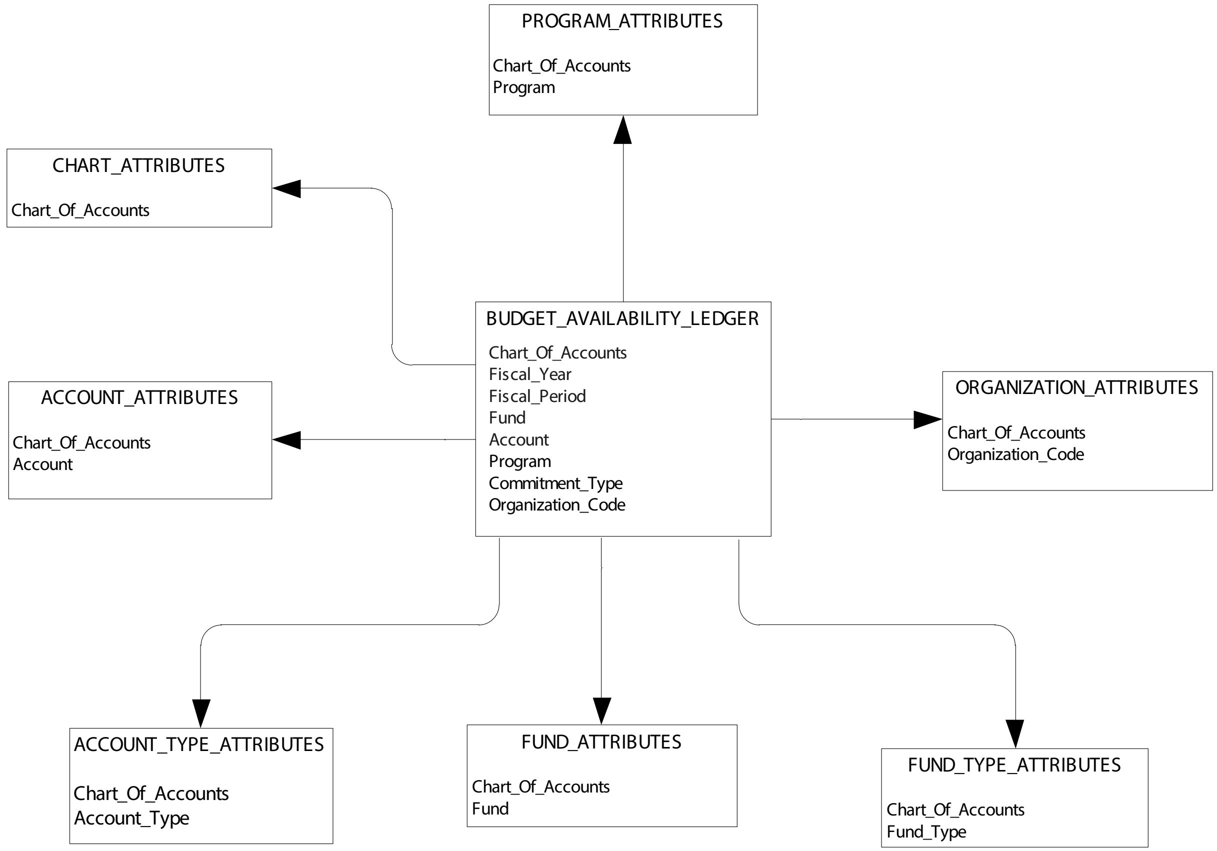
NOTE: All joins use the Account_Index's Effective_Date and Next_Change_Date with Finance effective date logic.

Budget Availability Comparison

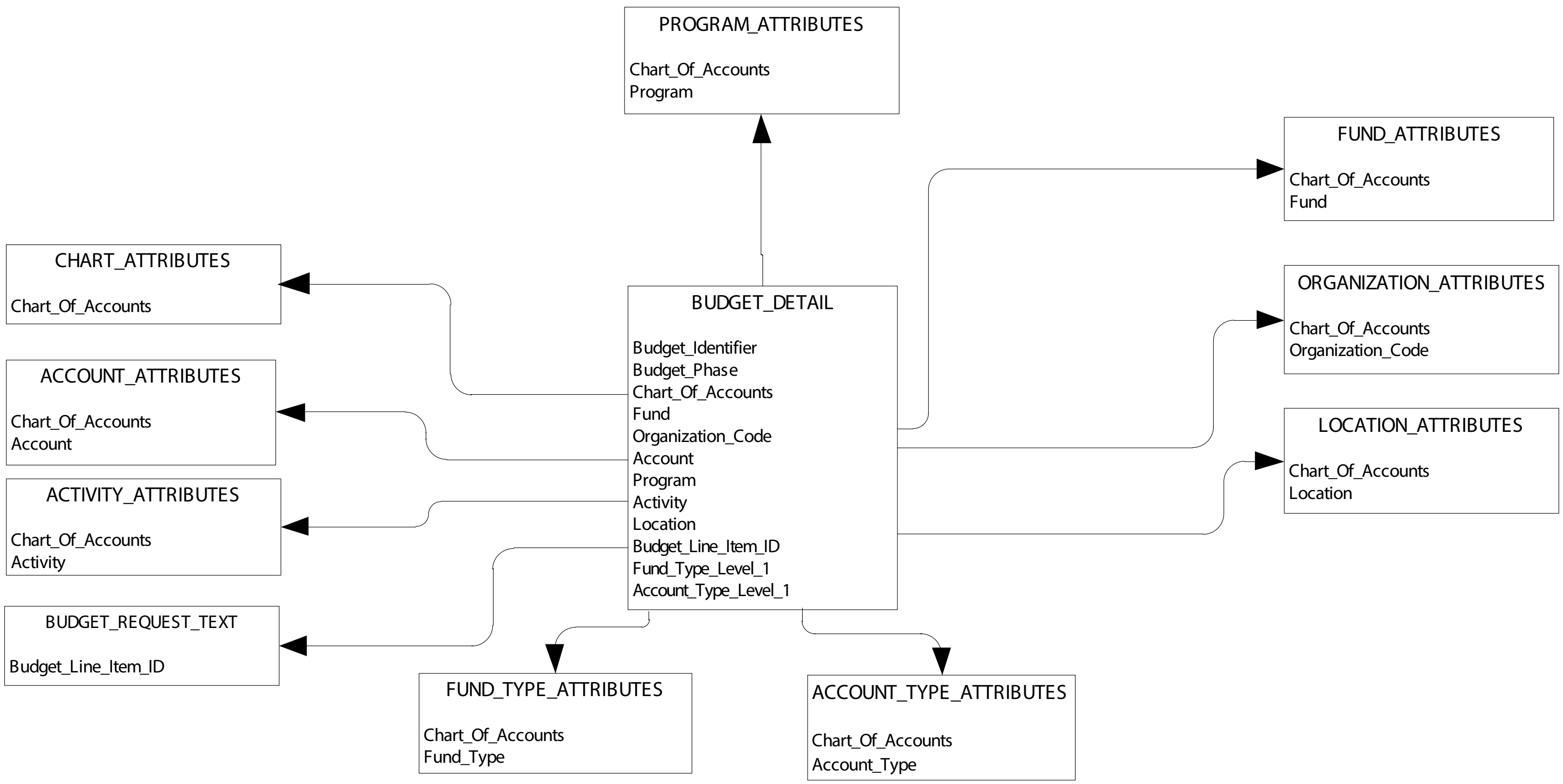
BUDGET_AVAILABILITY_LEDGER

Chart Of Accounts
Fiscal Year
Fiscal Period
Fund
Organization Code
Account
Program
Commitment Type

Budget Availability Ledger



Budget Detail

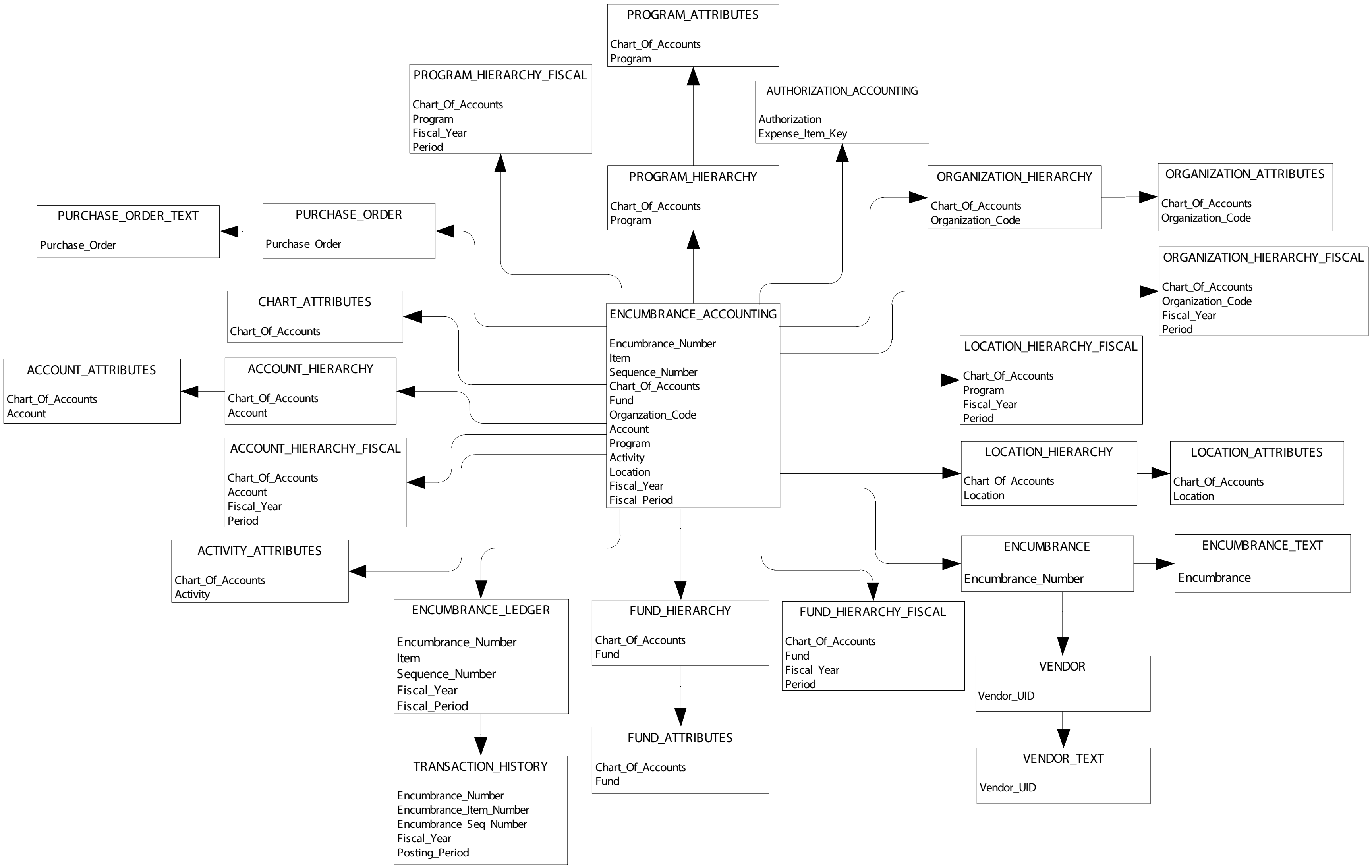


Cashier Session Analysis

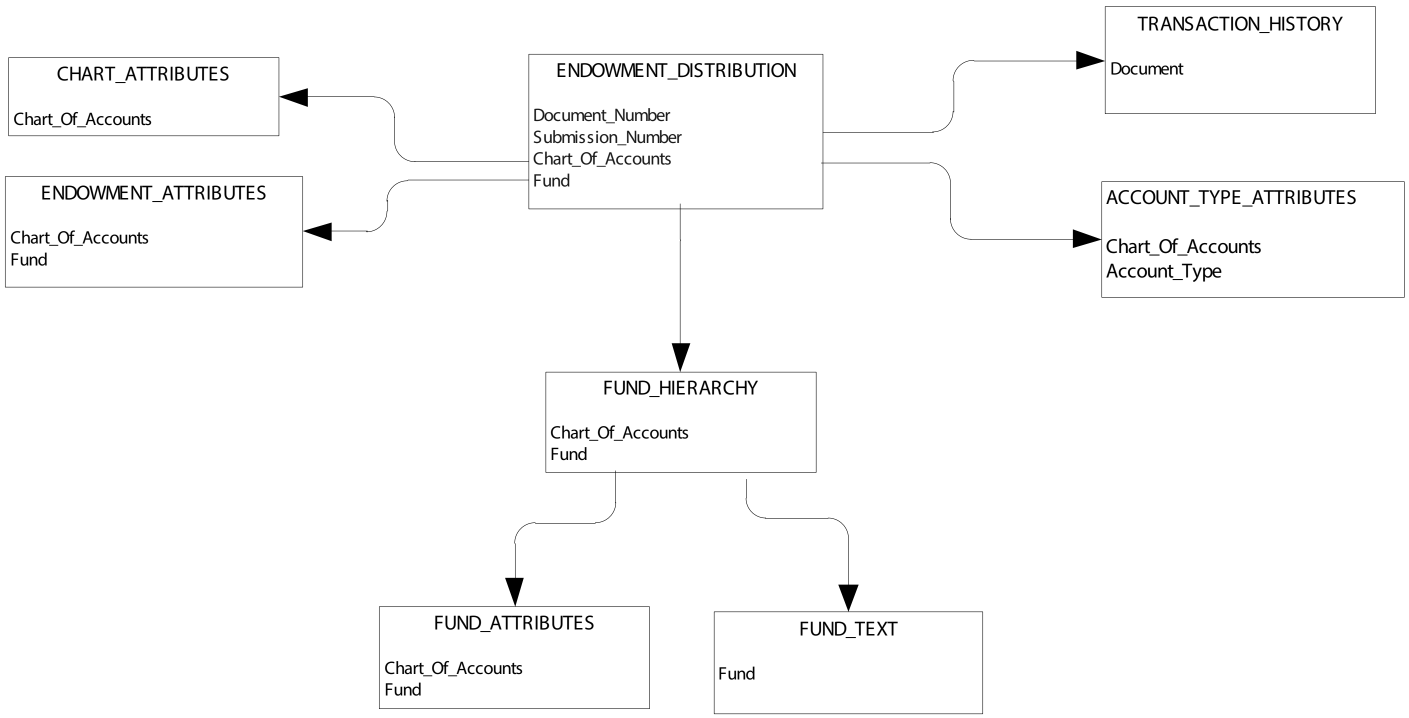
RECEIVABLE_ACCOUNT_DETAIL

Account Uid

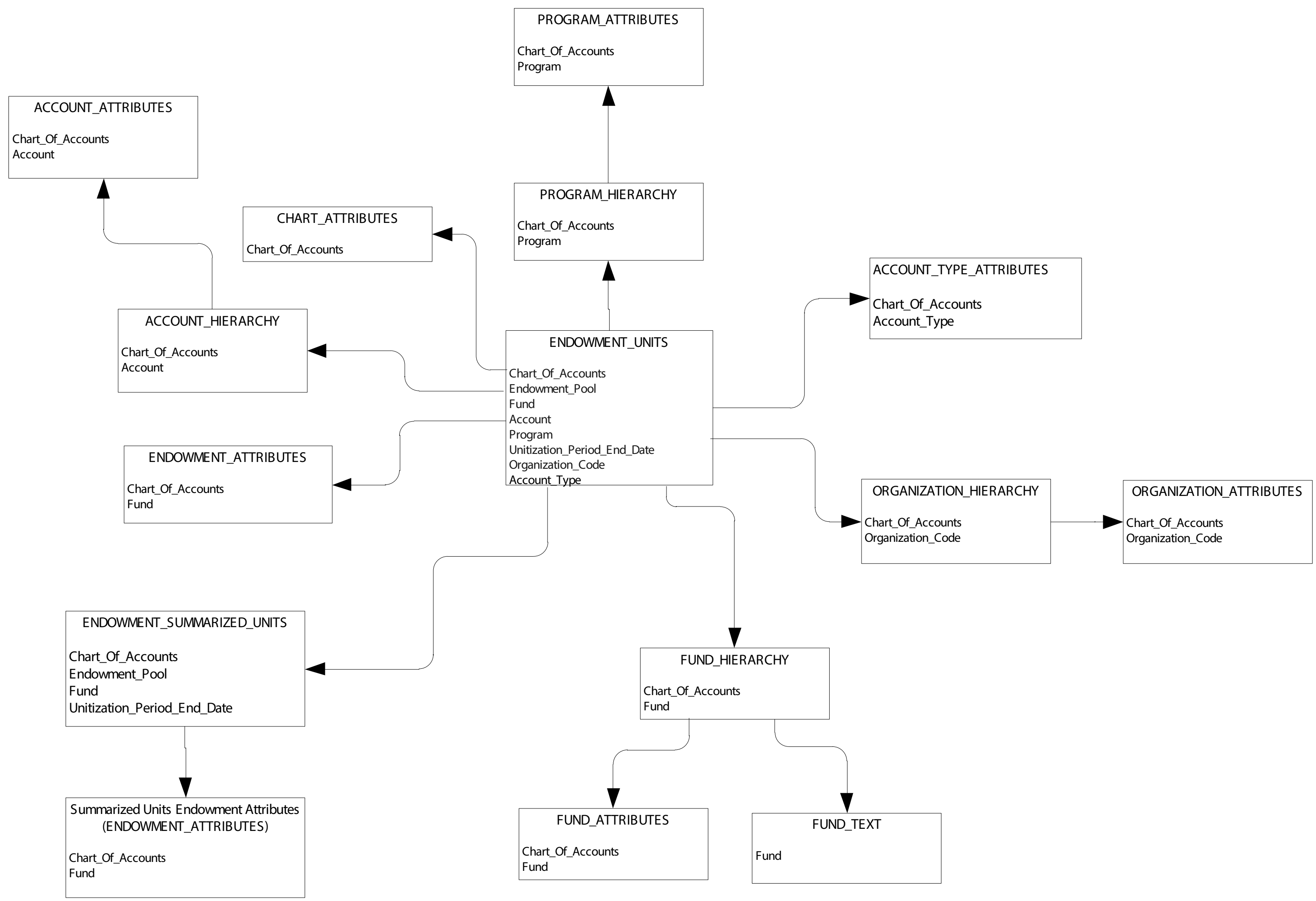
Encumbrance



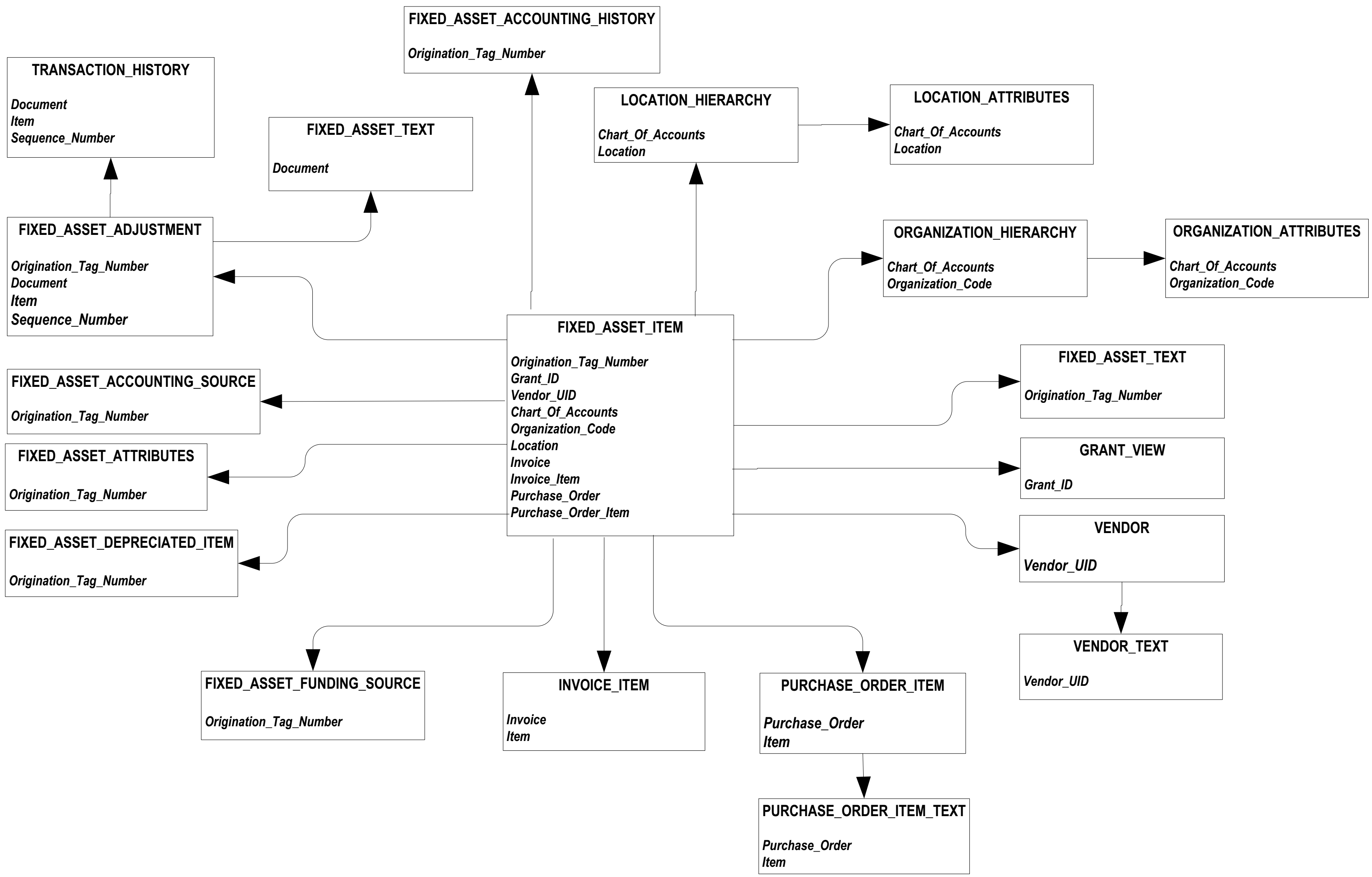
Endowment Distribution



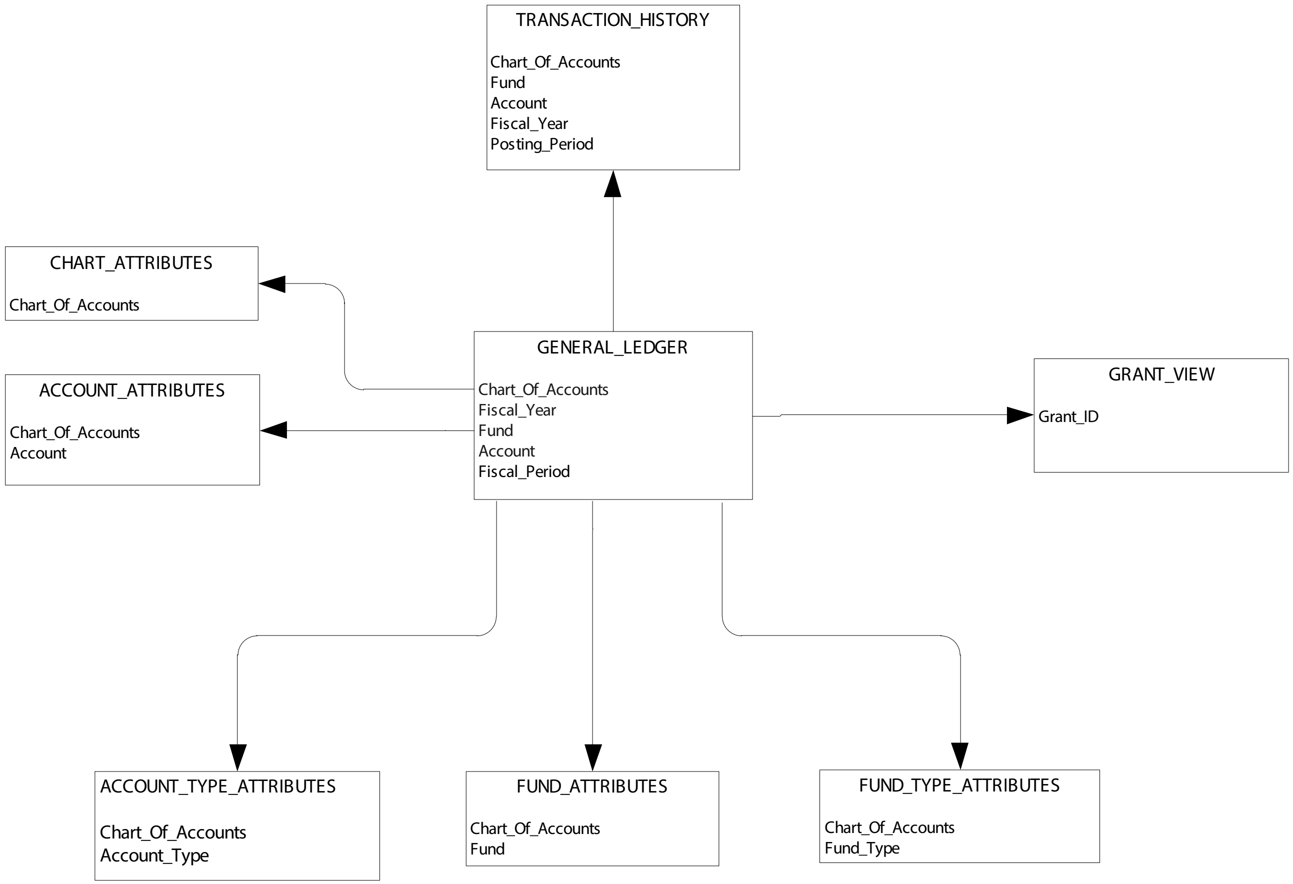
Endowment Units



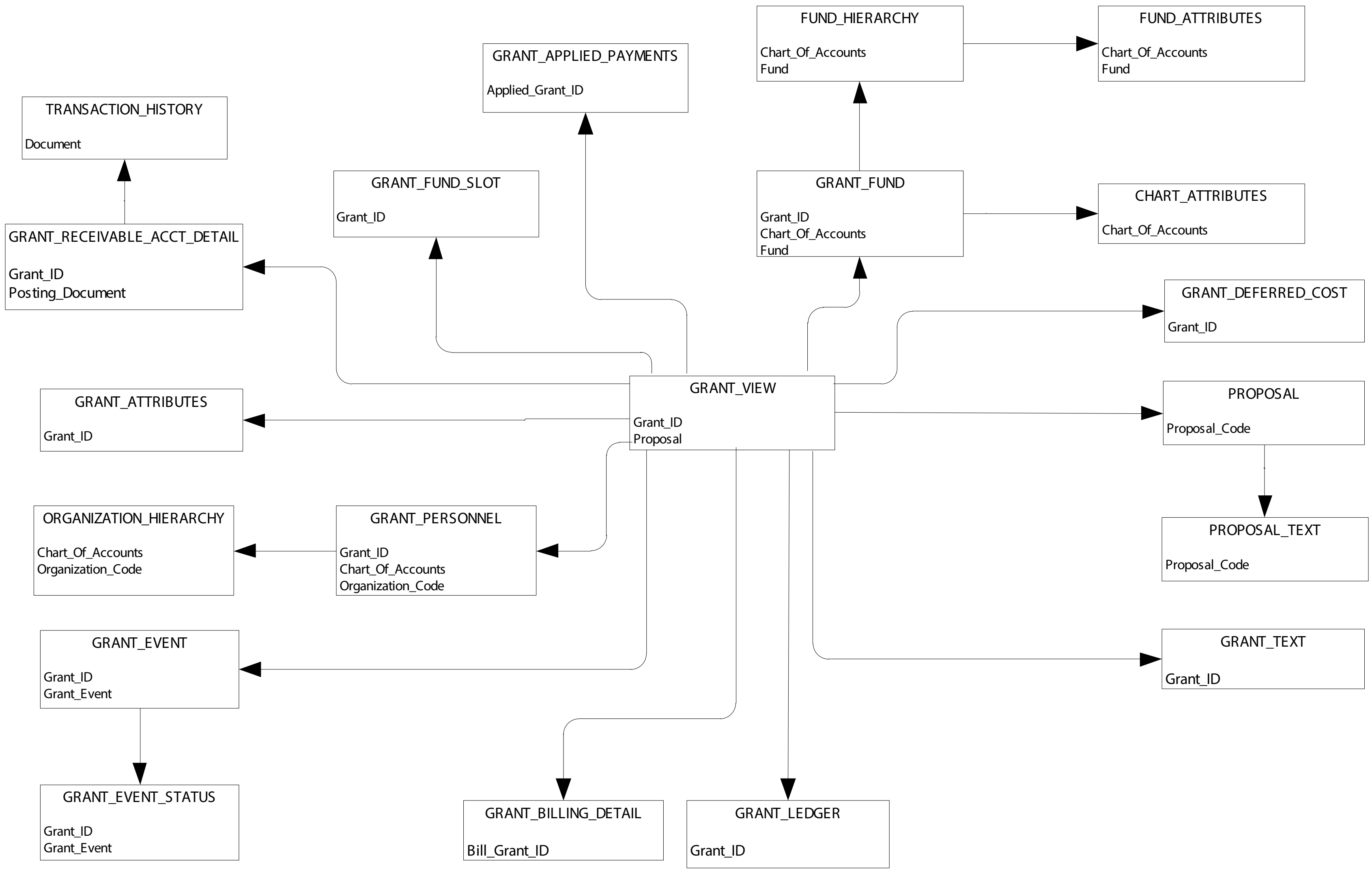
Fixed Asset


FIXED_ASSET_ACCOUNTING_HISTORY
Origination_Tag_Number
TRANSACTION_HISTORY
Document
Item
Sequence_Number
FIXED_ASSET_TEXT
Document
LOCATION_HIERARCHY
Chart_Of_Accounts
Location
LOCATION_ATTRIBUTES
Chart_Of_Accounts
Location
FIXED_ASSET_ADJUSTMENT
Origination_Tag_Number
Document
Item
Sequence_Number
ORGANIZATION_HIERARCHY
Chart_Of_Accounts
Organization_Code
ORGANIZATION_ATTRIBUTES
Chart_Of_Accounts
Organization_Code
FIXED_ASSET_ITEM
Origination_Tag_Number
Grant_ID
Vendor_UID
Chart_Of_Accounts
Organization_Code
Location
Invoice
Invoice_Item
Purchase_Order
Purchase_Order_Item
FIXED_ASSET_ACCOUNTING_SOURCE
Origination_Tag_Number
FIXED_ASSET_TEXT
Origination_Tag_Number
FIXED_ASSET_ATTRIBUTES
Origination_Tag_Number
GRANT_VIEW
Grant_ID
FIXED_ASSET_DEPRECIATED_ITEM
Origination_Tag_Number
VENDOR
Vendor_UID
VENDOR_TEXT
Vendor_UID
FIXED_ASSET_FUNDING_SOURCE
Origination_Tag_Number
INVOICE_ITEM
Invoice
Item
PURCHASE_ORDER_ITEM
Purchase_Order
Item
PURCHASE_ORDER_ITEM_TEXT
Purchase_Order
Item

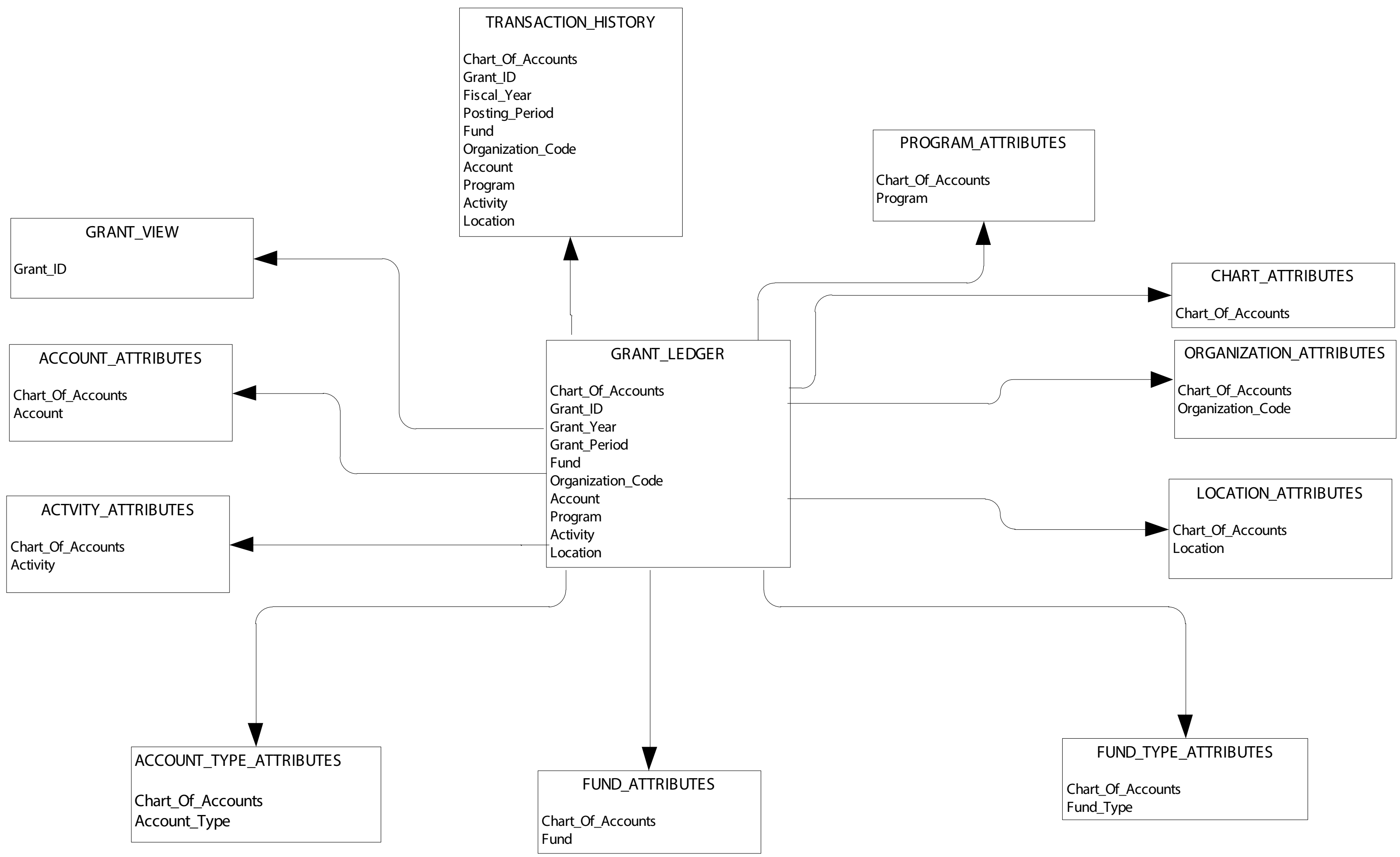
General Ledger



Grant and Project



Grant Ledger

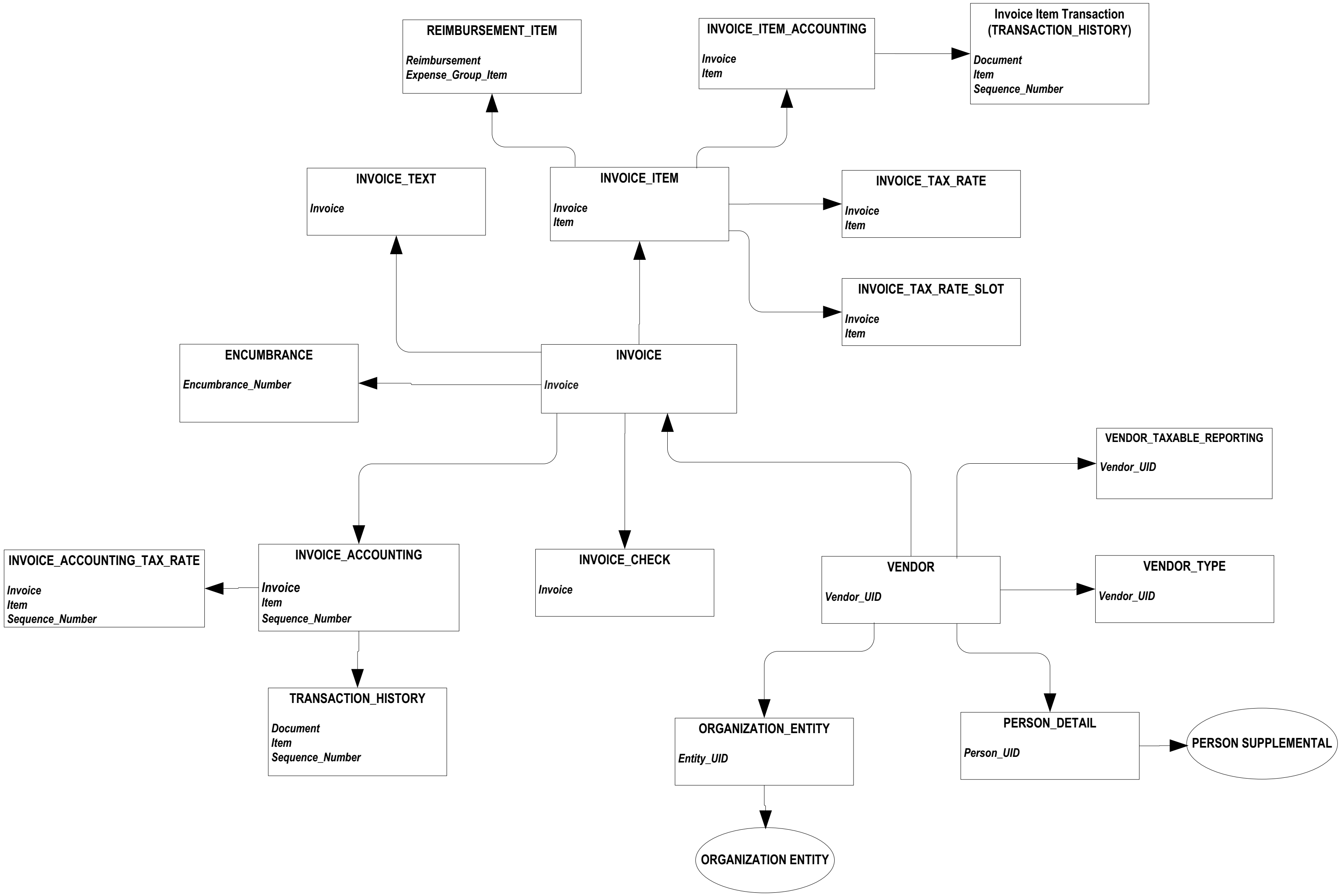


Grant-Contract and Proposal

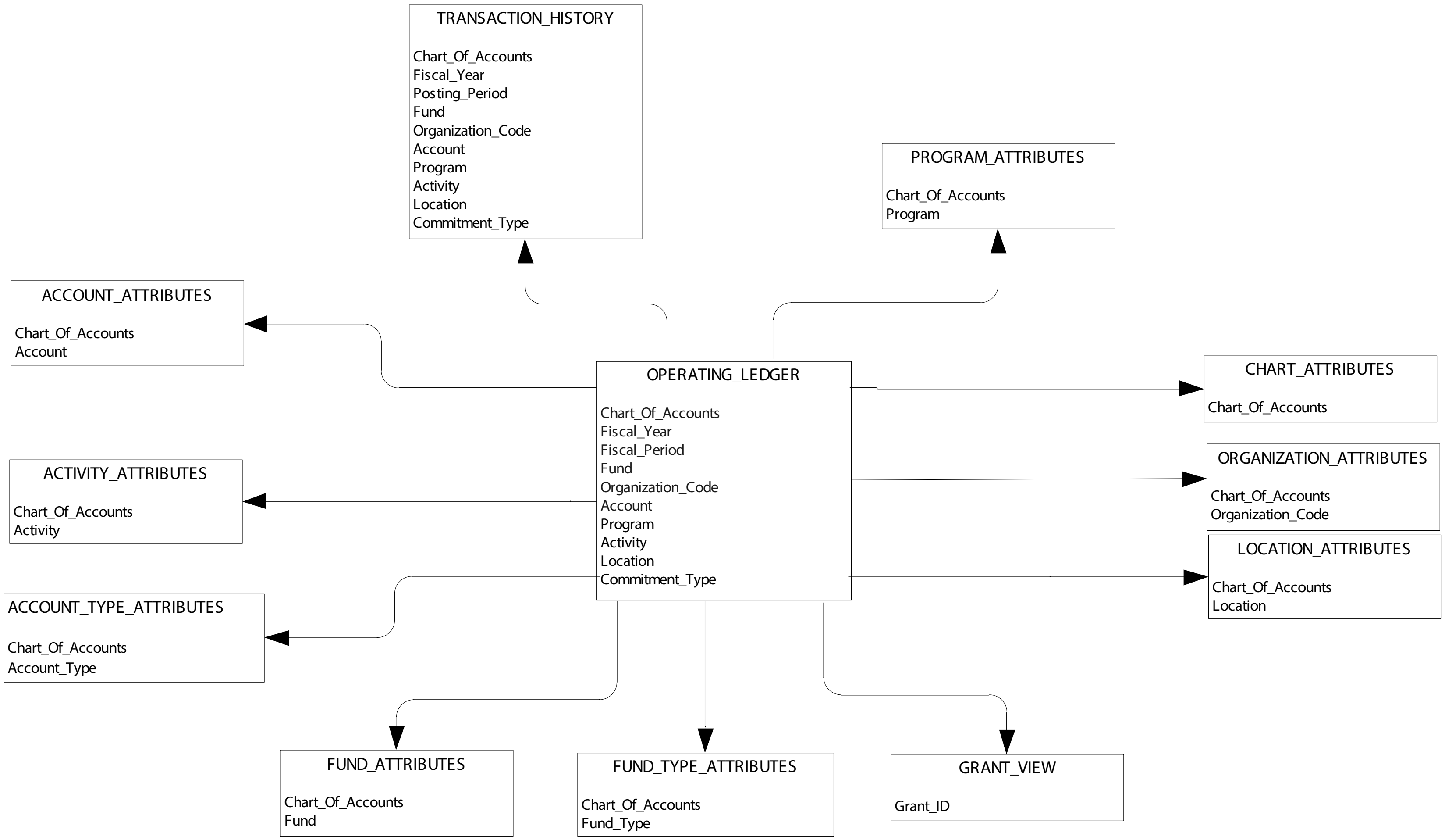
PROPOSAL

Proposal Code

Invoice Payable



Operating Ledger

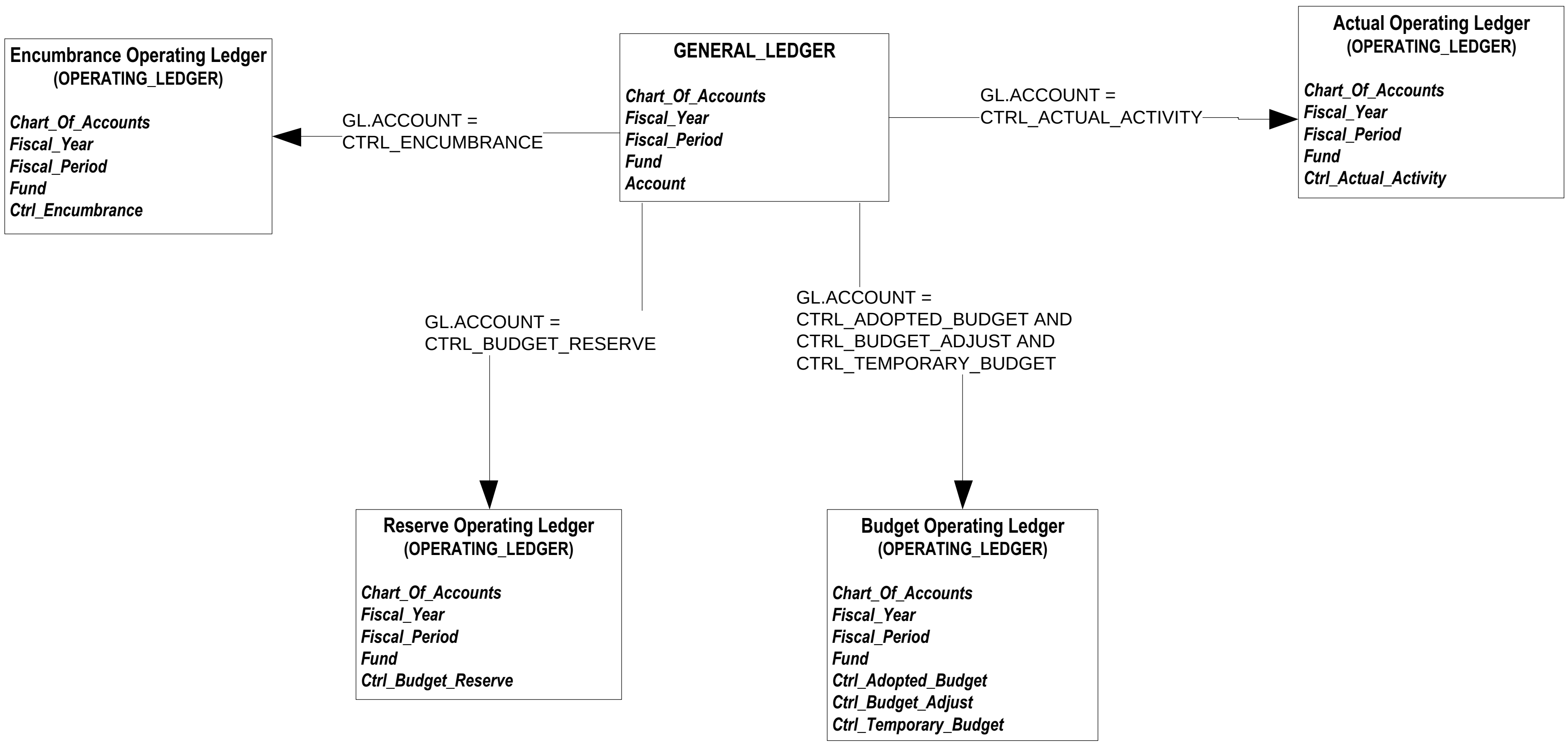


Operating Ledger Comparison

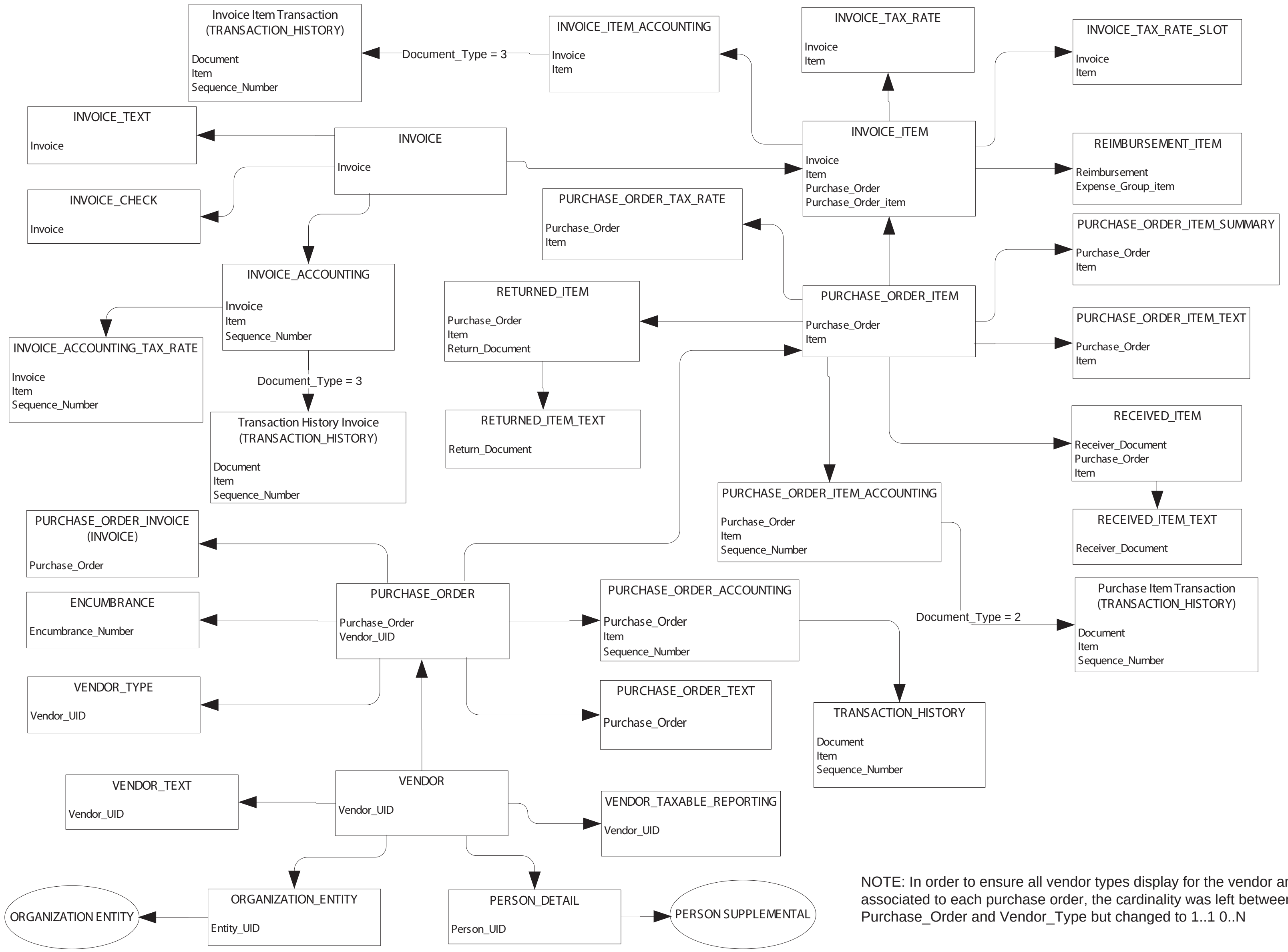
OPERATING_LEDGER

Chart Of Accounts
Fiscal Year
Fiscal Period
Fund
Organization Code
Account
Program
Activity
Location
Commitment Type

Operating Ledger Reconciliation

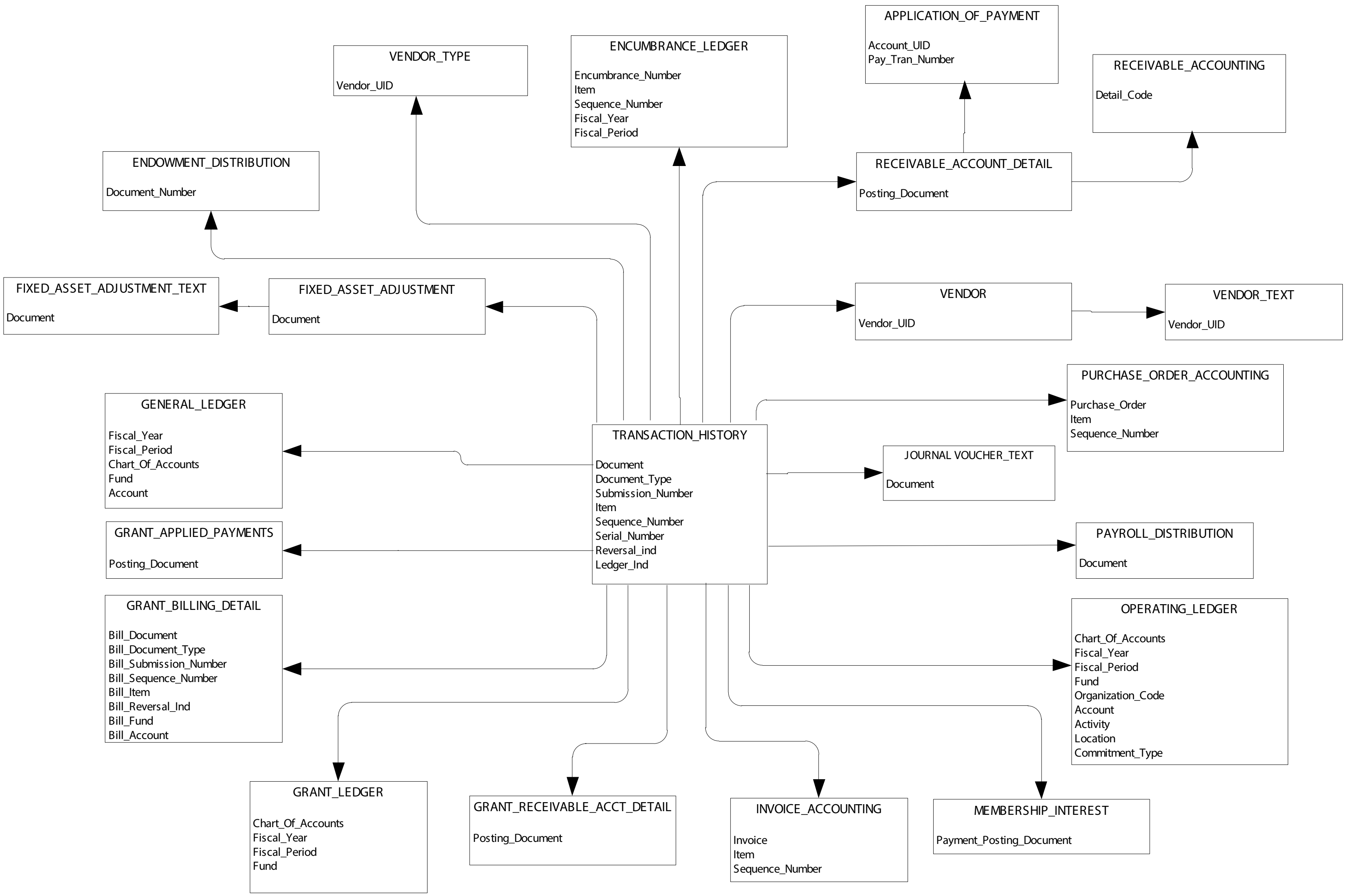


Purchasing Payable



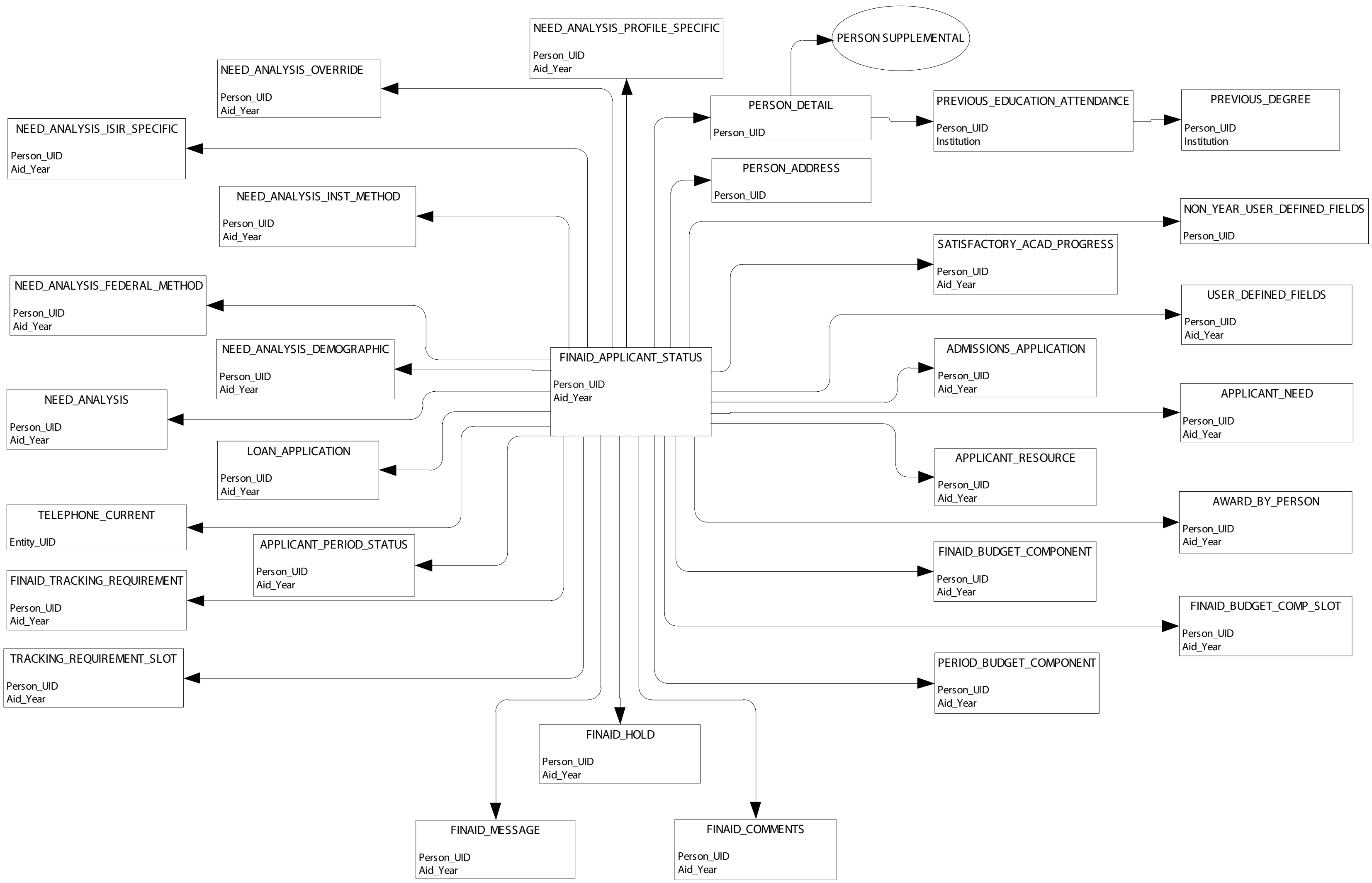
NOTE: In order to ensure all vendor types display for the vendor and associated to each purchase order, the cardinality was left between Purchase_Order and Vendor_Type but changed to 1..1 0..N

Transaction History

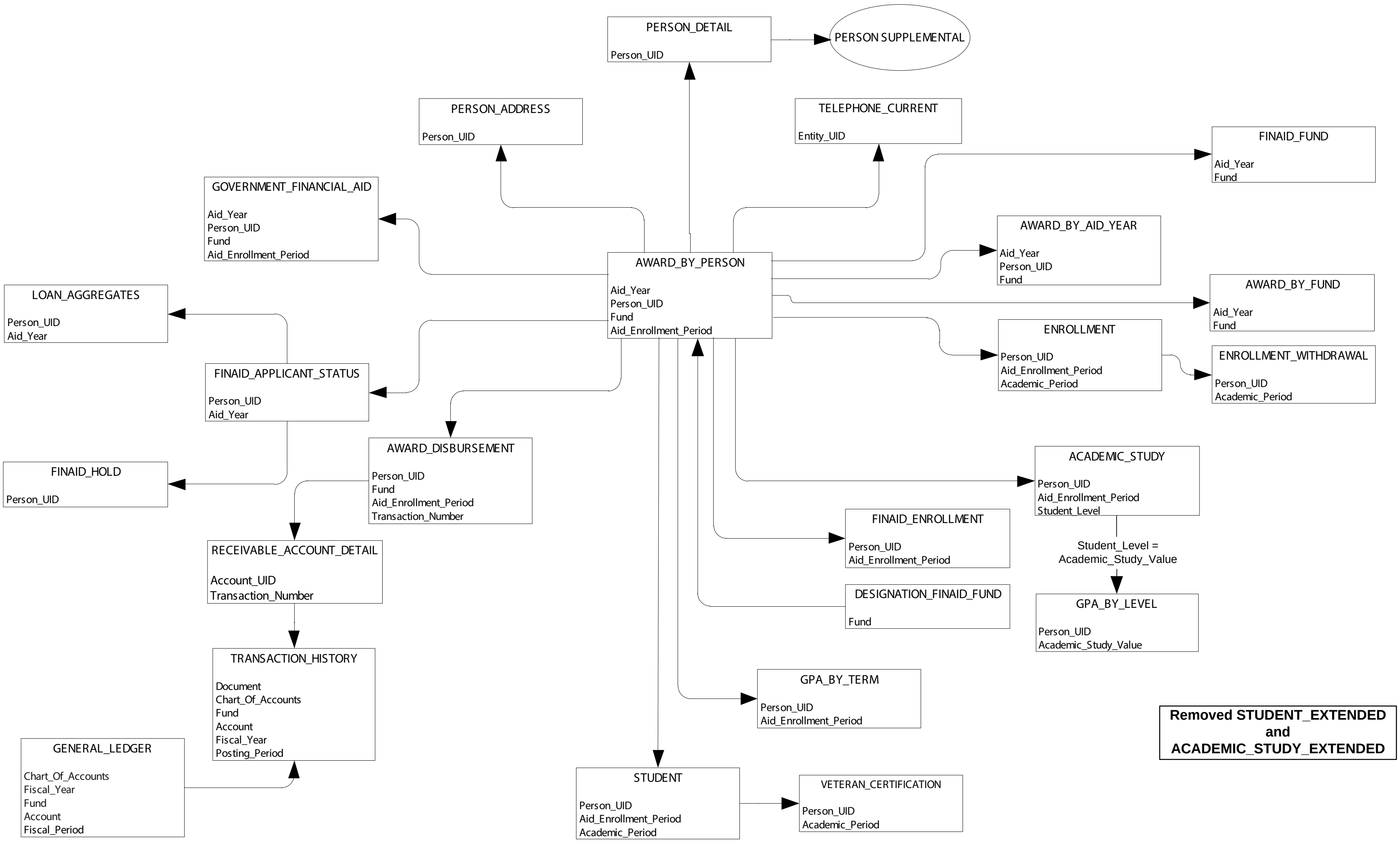


Financial Aid

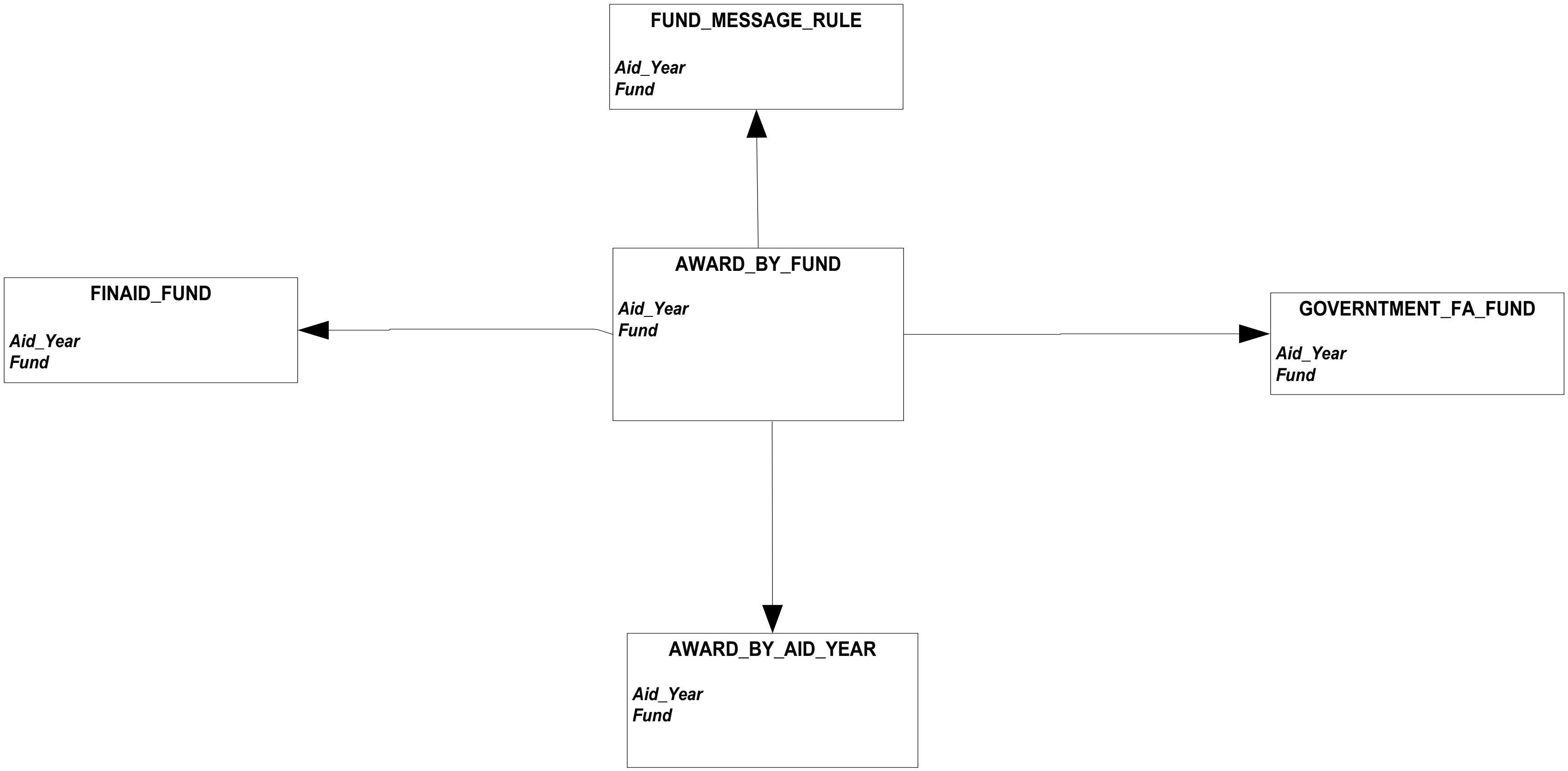
Financial Aid Application



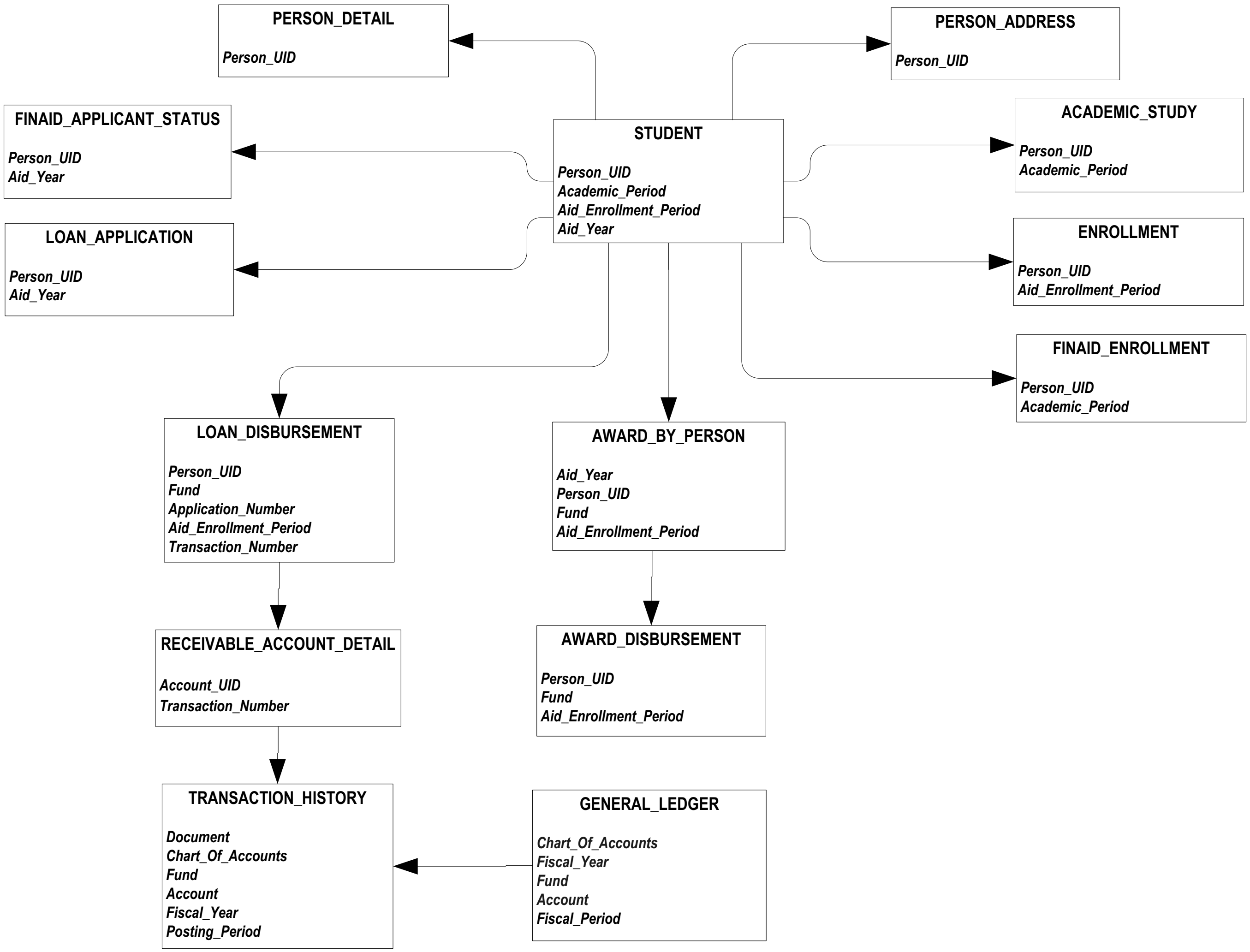
Financial Aid Award and Disbursement



Financial Aid Fund

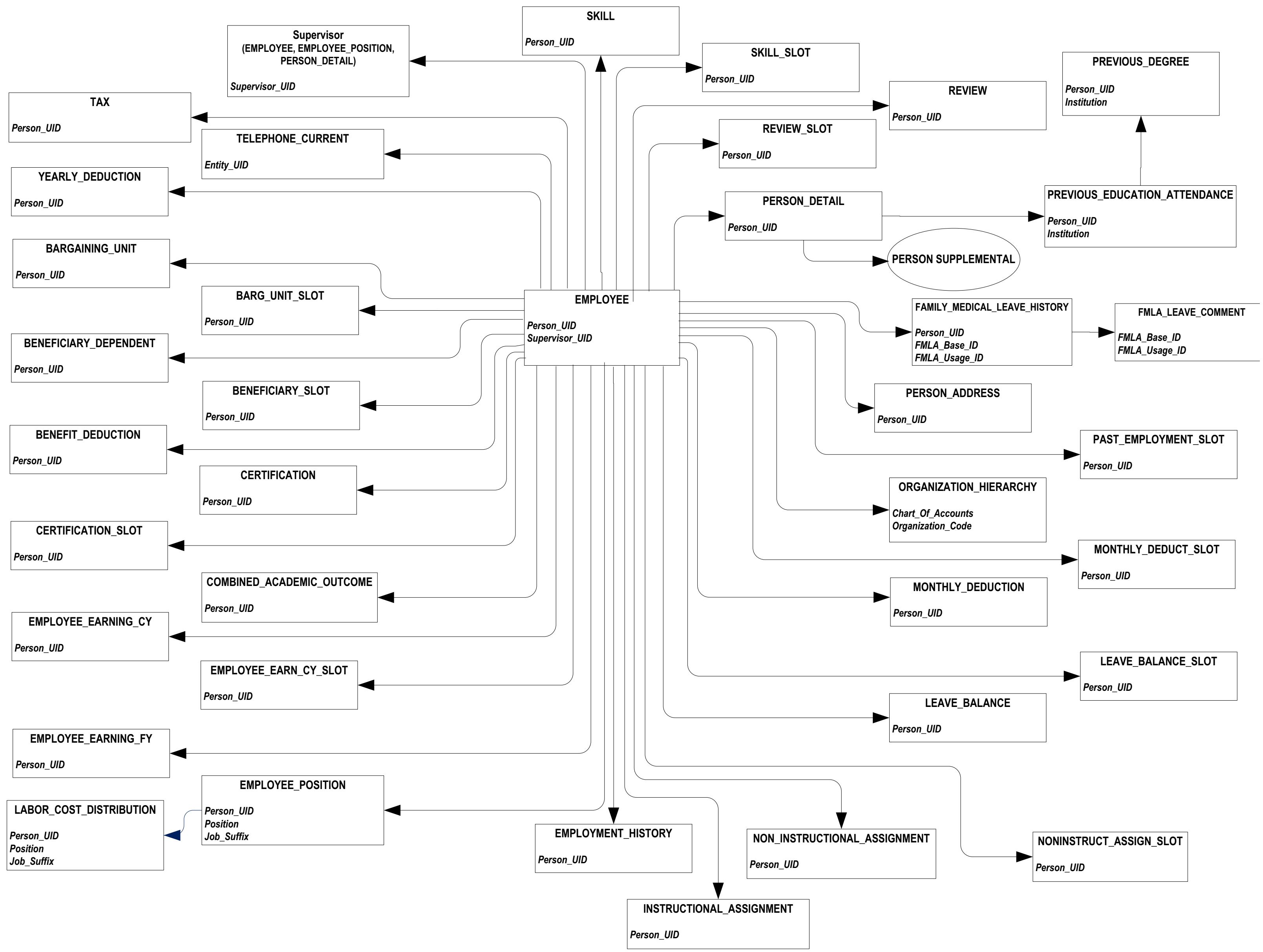


Loan Disbursement

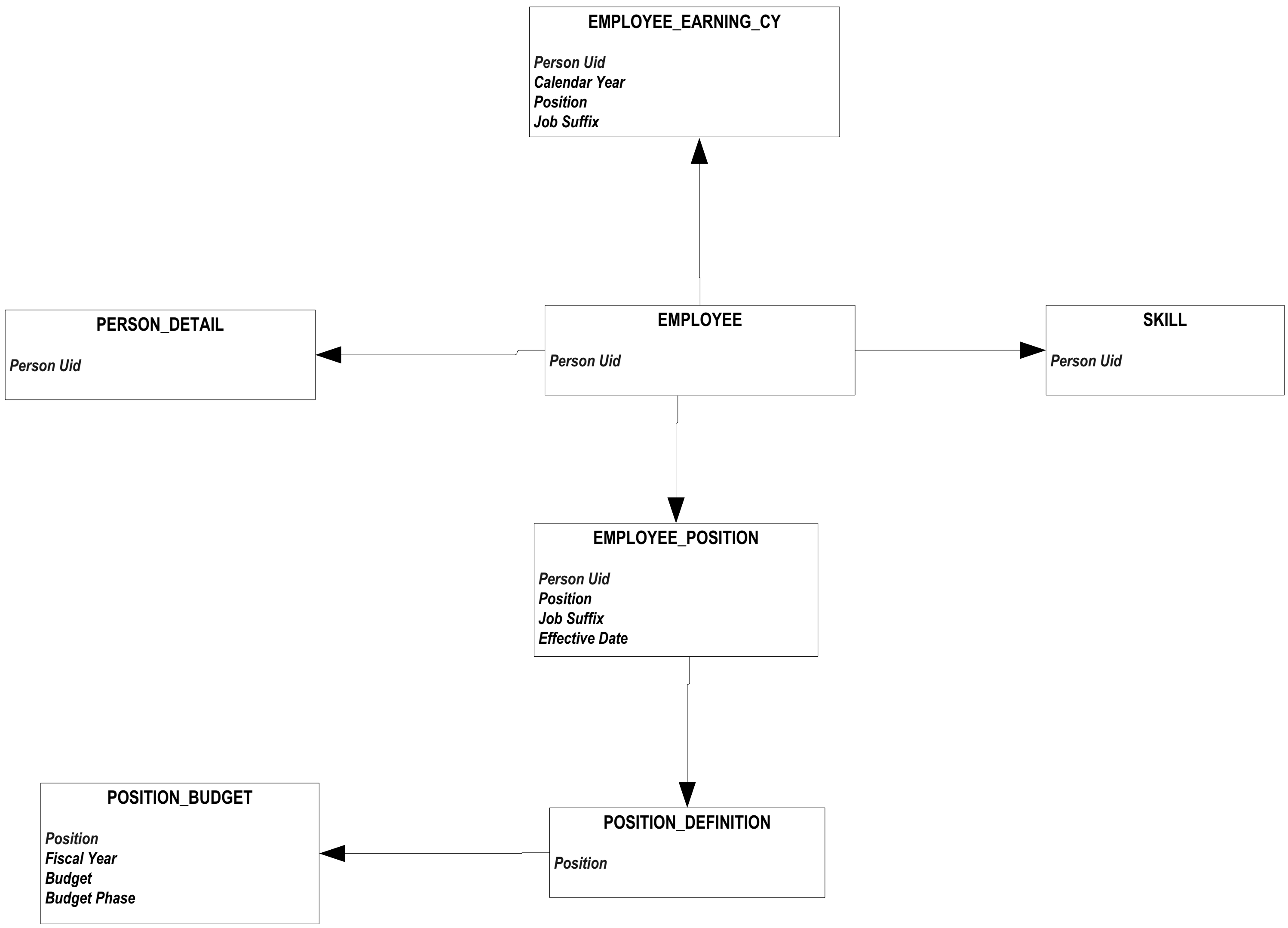


Human Resources

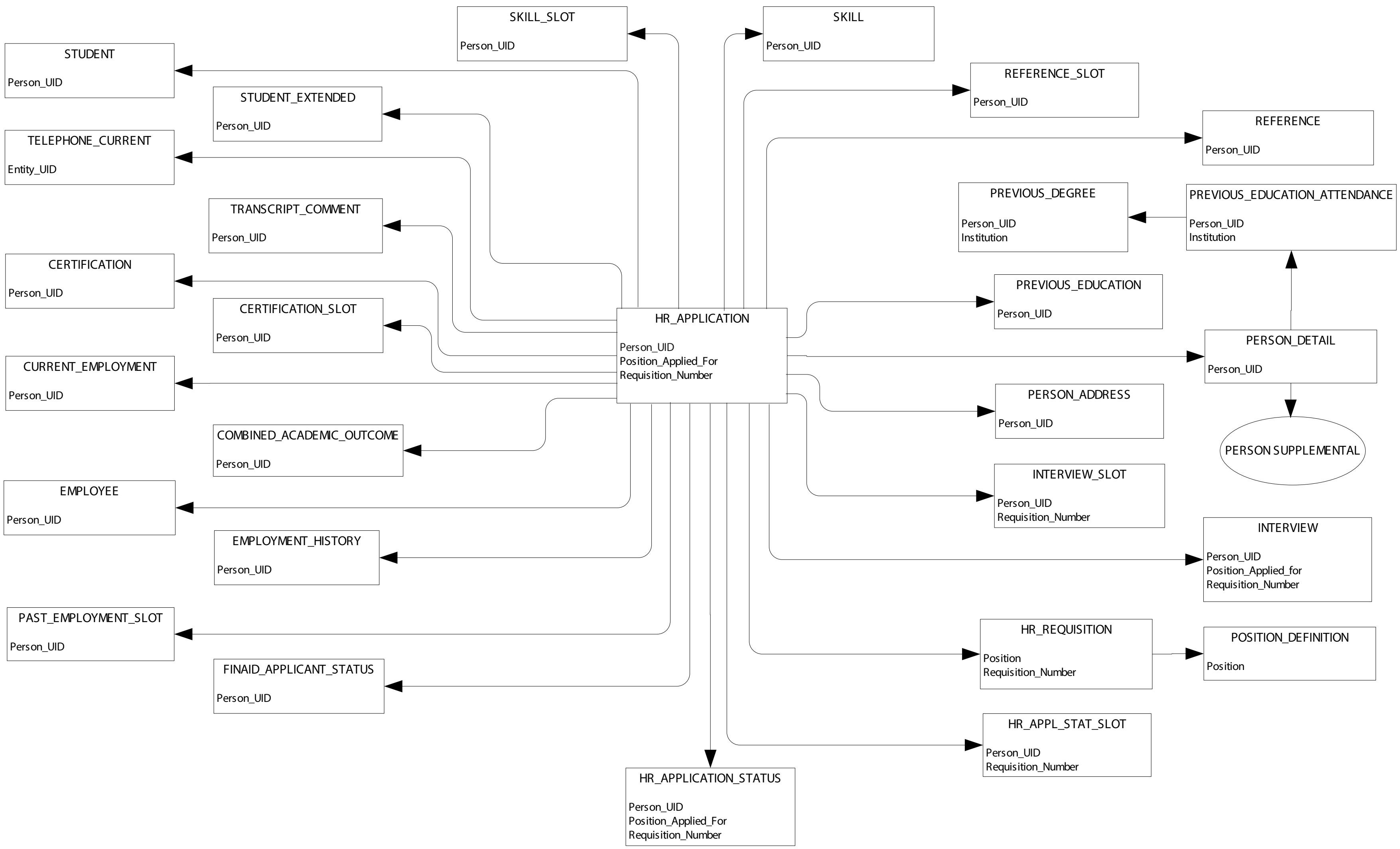
Employee


SKILL
Person_UID
Supervisor
(EMPLOYEE, EMPLOYEE_POSITION, PERSON_DETAIL)
Supervisor_UID
SKILL_SLOT
Person_UID
PREVIOUS_DEGREE
Person_UID
Institution
REVIEW
Person_UID
TAX
Person_UID
TELEPHONE_CURRENT
Entity_UID
REVIEW_SLOT
Person_UID
YEARLY_DEDUCTION
Person_UID
PERSON_DETAIL
Person_UID
PREVIOUS_EDUCATION_ATTENDANCE
Person_UID
Institution
PERSON SUPPLEMENTAL
BARGAINING_UNIT
Person_UID
BARG_UNIT_SLOT
Person_UID
EMPLOYEE
Person_UID
Supervisor_UID
FAMILY_MEDICAL_LEAVE_HISTORY
Person_UID
FMLA_Base_ID
FMLA_Usage_ID
FMLA_LEAVE_COMMENT
FMLA_Base_ID
FMLA_Usage_ID
BENEFICIARY_DEPENDENT
Person_UID
BENEFICIARY_SLOT
Person_UID
PERSON_ADDRESS
Person_UID
BENEFIT_DEDUCTION
Person_UID
PAST_EMPLOYMENT_SLOT
Person_UID
CERTIFICATION
Person_UID
ORGANIZATION_HIERARCHY
Chart_Of_Accounts
Organization_Code
CERTIFICATION_SLOT
Person_UID
MONTHLY_DEDUCT_SLOT
Person_UID
COMBINED_ACADEMIC_OUTCOME
Person_UID
MONTHLY_DEDUCTION
Person_UID
EMPLOYEE_EARNING_CY
Person_UID
EMPLOYEE_EARN_CY_SLOT
Person_UID
LEAVE_BALANCE_SLOT
Person_UID
LEAVE_BALANCE
Person_UID
EMPLOYEE_EARNING_FY
Person_UID
EMPLOYEE_POSITION
Person_UID
Position
Job_Suffix
LABOR_COST_DISTRIBUTION
Person_UID
Position
Job_Suffix
EMPLOYMENT_HISTORY
Person_UID
NON_INSTRUCTIONAL_ASSIGNMENT
Person_UID
NONINSTRUCT_ASSIGN_SLOT
Person_UID
INSTRUCTIONAL_ASSIGNMENT
Person_UID

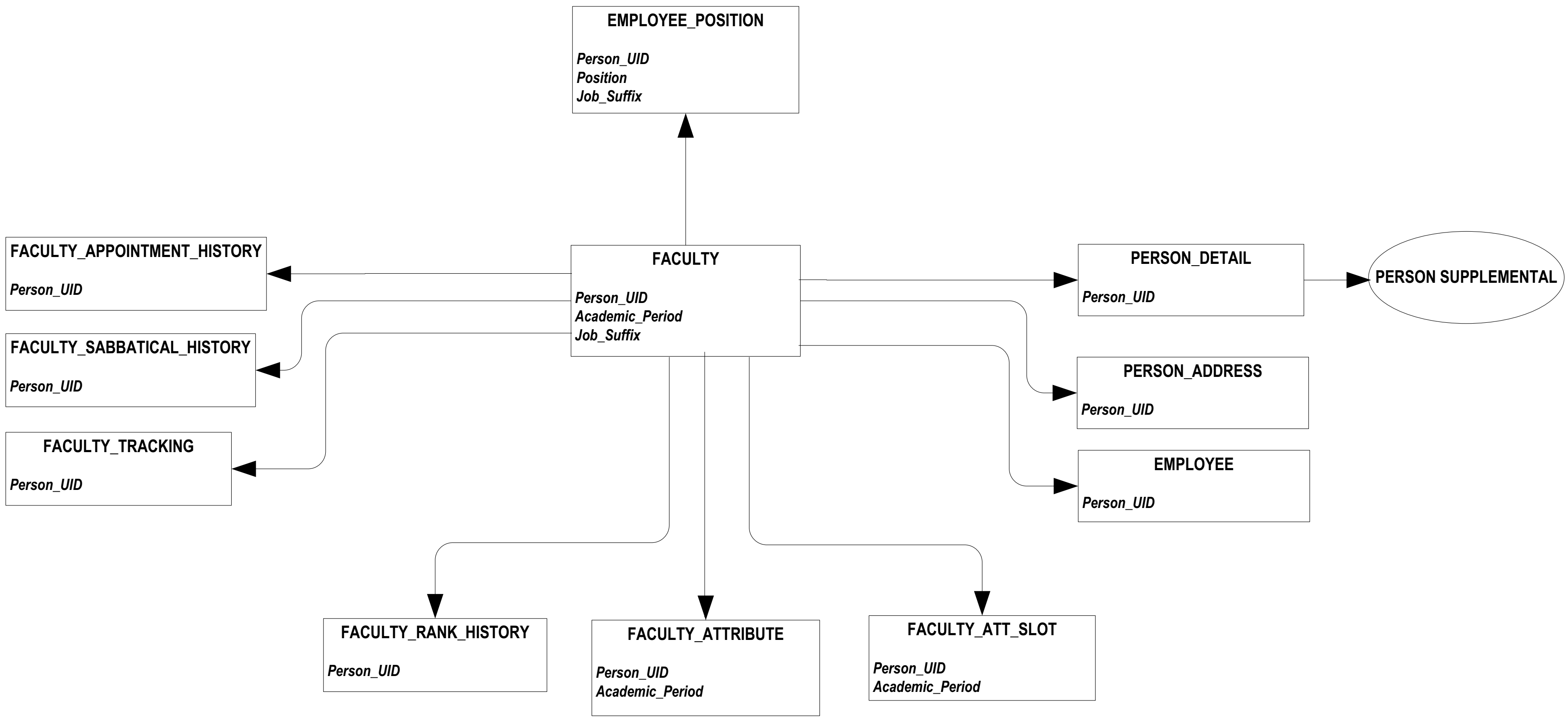
Employee and Position



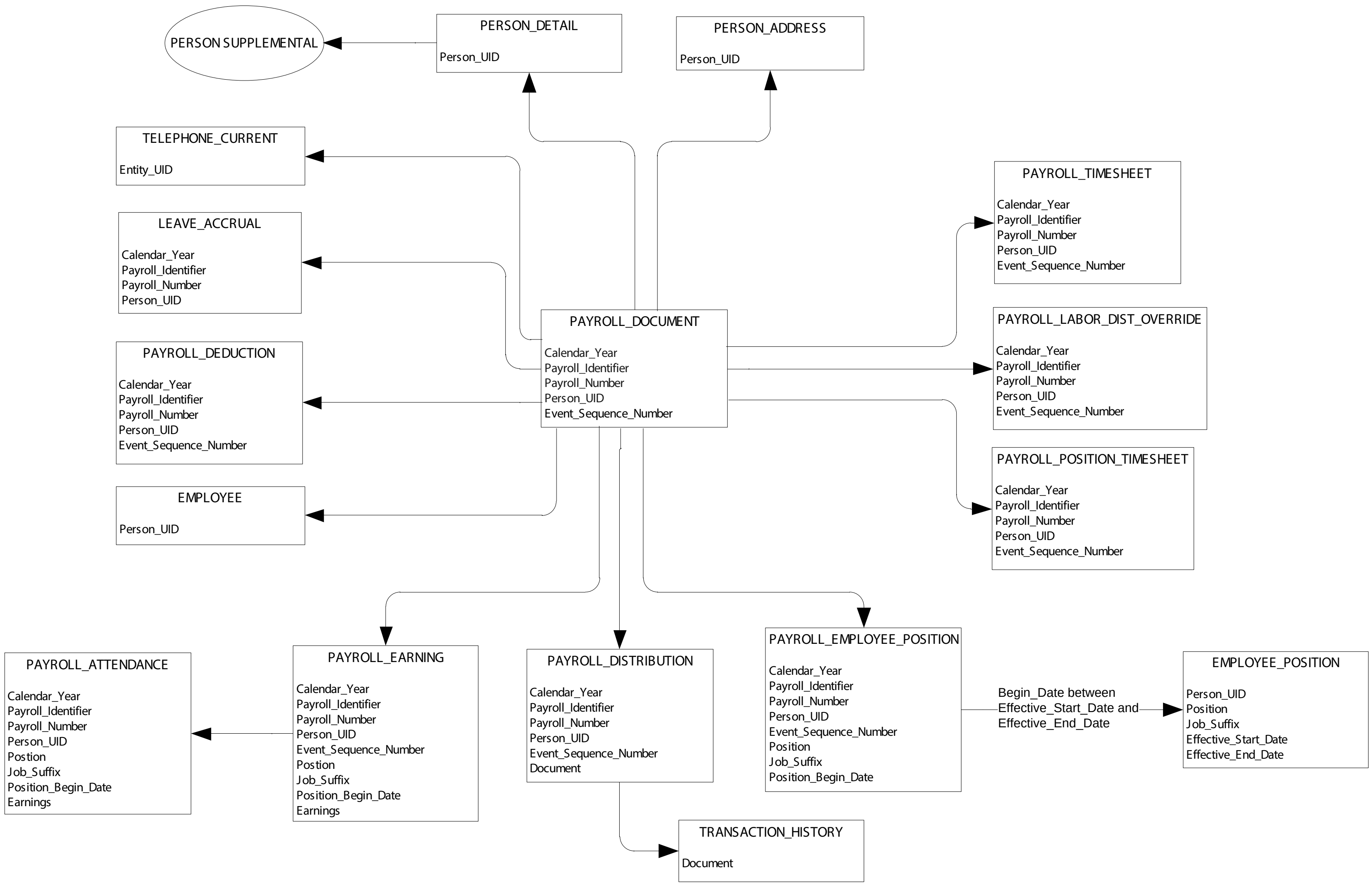
Human Resource Application



Human Resource Faculty



Payroll


PERSON SUPPLEMENTAL
PERSON_DETAIL
Person_UID
PERSON_ADDRESS
Person_UID
TELEPHONE_CURRENT
Entity_UID
LEAVE_ACCRUAL
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
PAYROLL_DEDUCTION
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Event_Sequence_Number
EMPLOYEE
Person_UID
PAYROLL_DOCUMENT
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Event_Sequence_Number
PAYROLL_TIMESHEET
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Event_Sequence_Number
PAYROLL_LABOR_DIST_OVERRIDE
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Event_Sequence_Number
PAYROLL_POSITION_TIMESHEET
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Event_Sequence_Number
PAYROLL_ATTENDANCE
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Postion
Job_Suffix
Position_Begin_Date
Earnings
PAYROLL_EARNING
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Event_Sequence_Number
Postion
Job_Suffix
Position_Begin_Date
Earnings
PAYROLL_DISTRIBUTION
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Event_Sequence_Number
Document
PAYROLL_EMPLOYEE_POSITION
Calendar_Year
Payroll_Identifier
Payroll_Number
Person_UID
Event_Sequence_Number
Position
Job_Suffix
Position_Begin_Date
Begin_Date between
Effective_Start_Date and
Effective_End_Date
EMPLOYEE_POSITION
Person_UID
Position
Job_Suffix
Effective_Start_Date
Effective_End_Date
TRANSACTION_HISTORY
Document

Determinants for Payroll:

Query Subject	Determinant Name	Determinant Columns
Payroll Document	UK_PAYROLL_DOCUMENT	Calendar_Year Payroll_Identifier Payroll_Number Person_UID Event_Sequence_Number Document Priority
Employee	UK_EMPLOYEE	Person_UID
Employee Position	UK_EMPLOYEE_POSITION	Person_UID Effective_Date Position Job_Suffix

Query Subject	Determinant Name	Determinant Columns
Leave Accrual	UK_LEAVE_ACCRUAL	Calendar_Year
		Payroll_Identifier
		Payroll_Number
		Person_UID
		Position
		Job_Suffix
		Position_Begin_Date
		Leave
Payroll Attendance	UK_PAYROLL_ATTENDANCE	Calendar_Year
		Payroll_Identifier
		Payroll_Number
		Person_UID
		Position
		Job_Suffix
		Position_Begin_Date
		Earnings
		Absence_Date

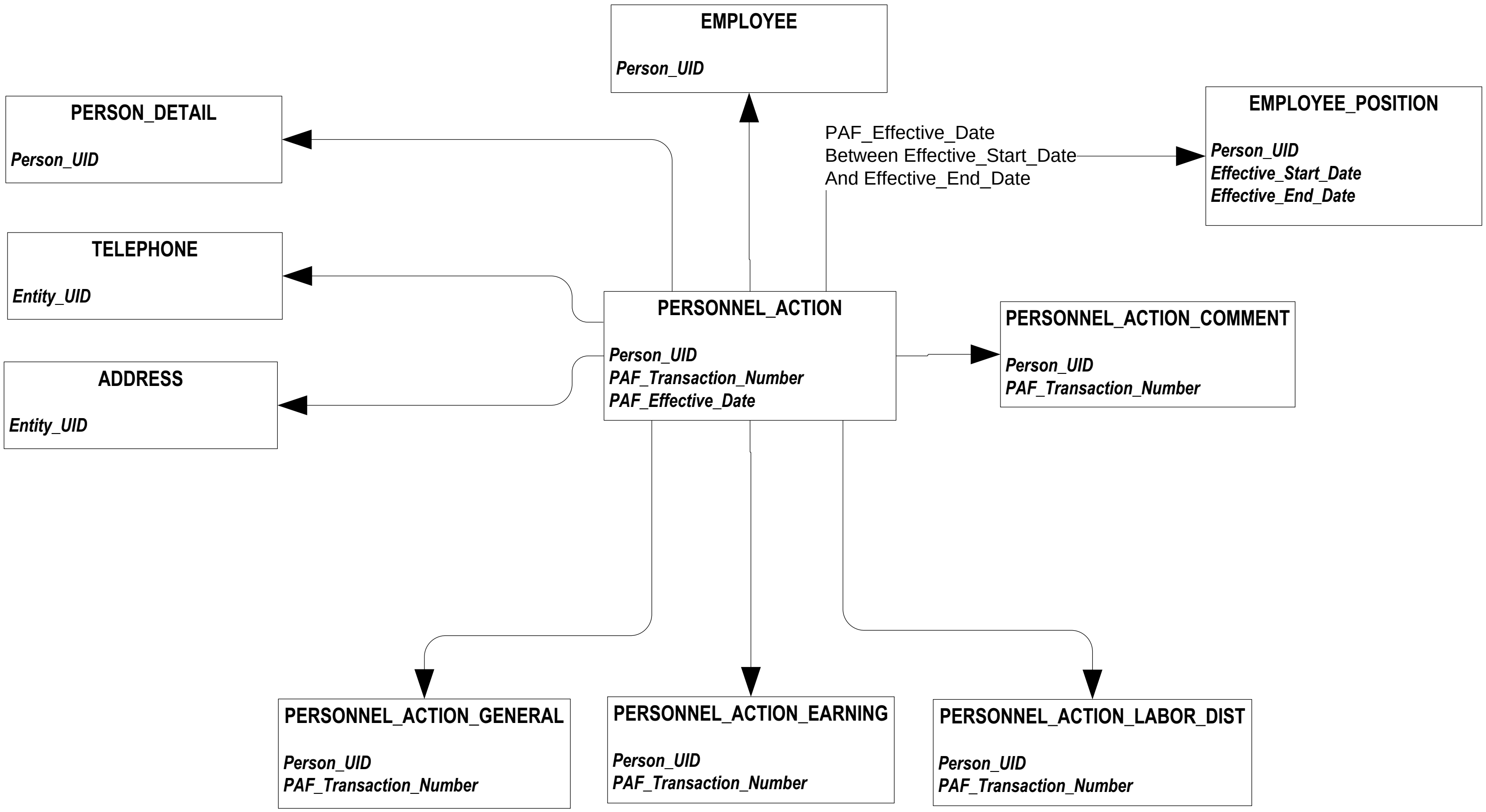
Query Subject	Determinant Name	Determinant Columns
Payroll Deduction	UK_PAYROLL_DEDUCTION	Calendar_Year Payroll_Identifier Payroll_Number Person_UID Event_Sequence_Number Deduction
Payroll Earning	UK_PAYROLL_EARNING	Calendar_Year Payroll_Identifier Payroll_Number Generated_Ind Person_UID Event_Sequence_Number Position Job_Suffix Position_Begin_Date Earnings Shift_Number

Query Subject	Determinant Name	Determinant Columns
Payroll Employee Position	UK_PAYROLL_EMPLOYEE_POSITION	Calendar_Year Payroll_Identifier Payroll_Number Person_UID Event_Sequence_Number Position Job_Suffix Position_Begin_Date
Payroll Labor Dist Override	UK_PAYROLL_LABOR_DIST_OVERRIDE	Calendar_Year Payroll_Identifier Payroll_Number System_Generated_Ind Person_UID Event_Sequence_Number Position Job_Suffix Position_Begin_Date Earnings Shift_Number

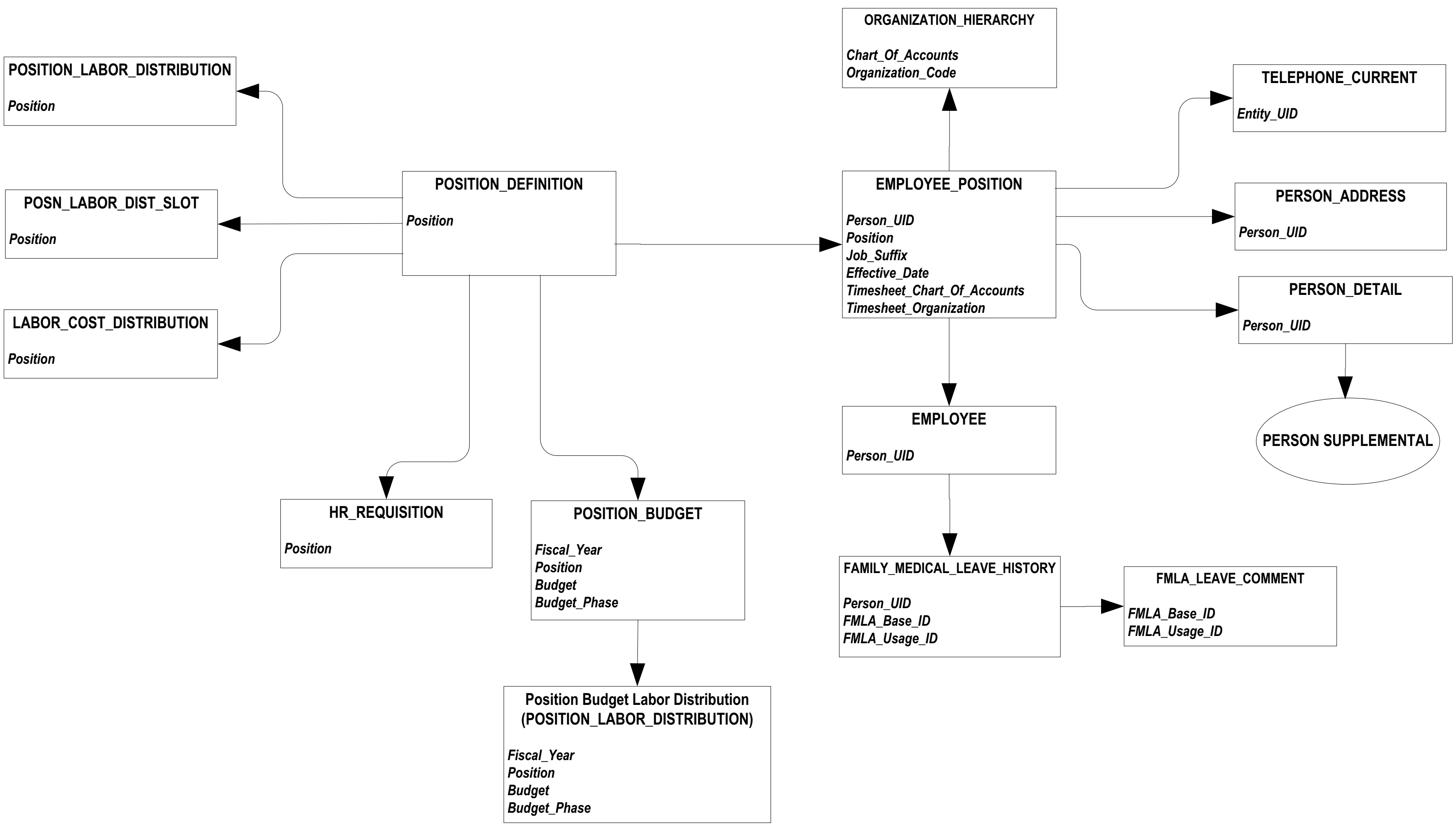
Query Subject	Determinant Name	Determinant Columns
Payroll Position Timesheet	UK_PAYROLL_POSITION_ TIMESHEET	Calendar_Year Payroll_Identifier Payroll_Number System_Generated_Ind Person_UID Event_Sequence_Number Position Job_Suffix Position_Begin_Date Earnings Shift_Number Time_Entry_Period_Begin_Date

Query Subject	Determinant Name	Determinant Columns
Payroll Timesheet	UK_PAYROLL_TIMESHEET	Calendar_Year
		Payroll_Identifier
		Payroll_Number
		Person_UID
		Event_Sequence_Number
		Position
		Job_Suffix
		Effective_Date
		Earnings
		Shift_Number
		Time_Entry_Period_Begin_Date
Person Detail	UK_PERSON_DETAIL	Person_UID

Personnel Action Audit



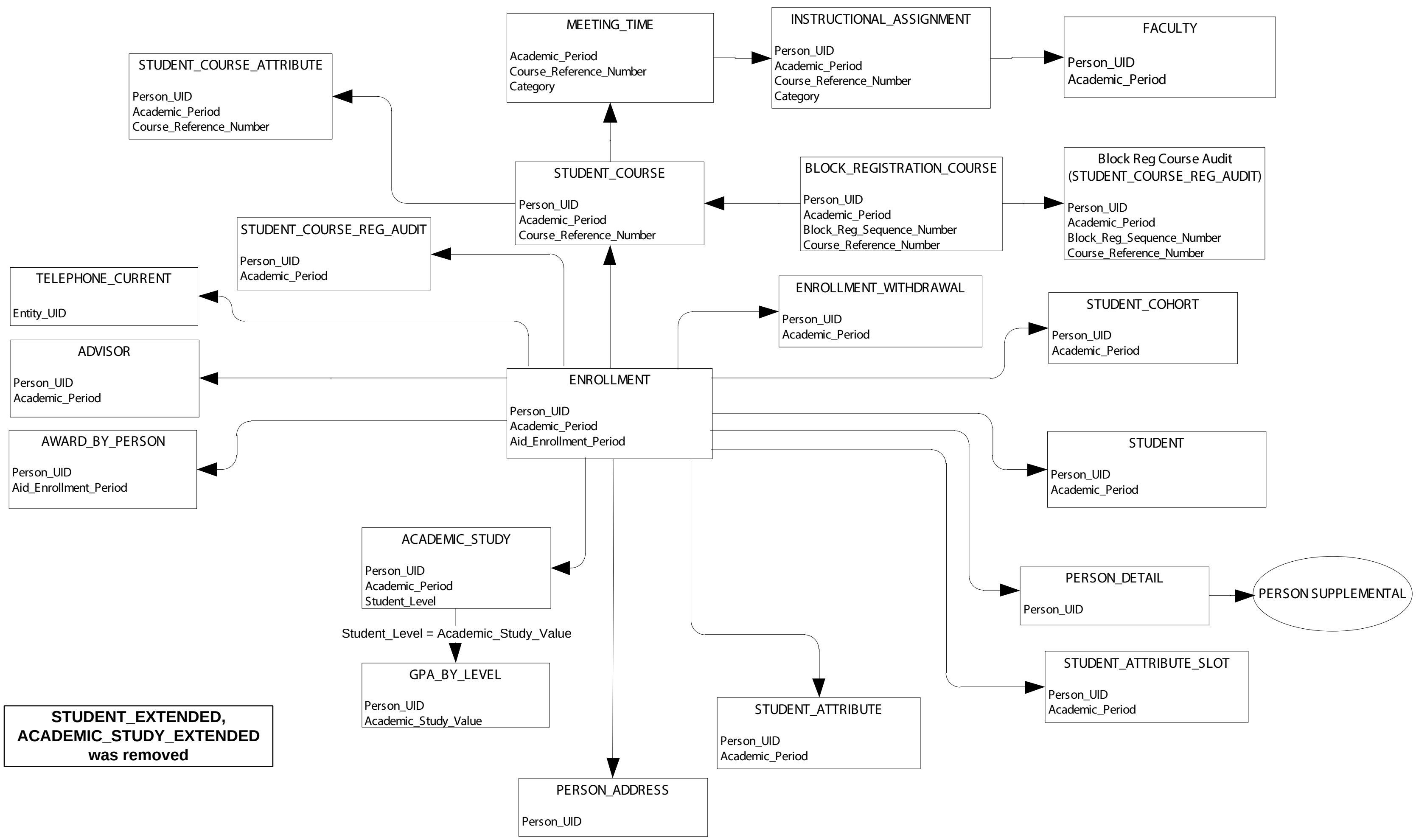
Position


POSITION_LABOR_DISTRIBUTION
Position
POSN_LABOR_DIST_SLOT
Position
LABOR_COST_DISTRIBUTION
Position
POSITION_DEFINITION
Position
HR_REQUISITION
Position
POSITION_BUDGET
Fiscal_Year
Position
Budget
Budget_Phase
Position Budget Labor Distribution
(POSITION_LABOR_DISTRIBUTION)
Fiscal_Year
Position
Budget
Budget_Phase
ORGANIZATION_HIERARCHY
Chart_Of_Accounts
Organization_Code
EMPLOYEE_POSITION
Person_UID
Position
Job_Suffix
Effective_Date
Timesheet_Chart_Of_Accounts
Timesheet_Organization
EMPLOYEE
Person_UID
FAMILY_MEDICAL_LEAVE_HISTORY
Person_UID
FMLA_Base_ID
FMLA_Usage_ID
FMLA_LEAVE_COMMENT
FMLA_Base_ID
FMLA_Usage_ID
TELEPHONE_CURRENT
Entity_UID
PERSON_ADDRESS
Person_UID
PERSON_DETAIL
Person_UID
PERSON SUPPLEMENTAL

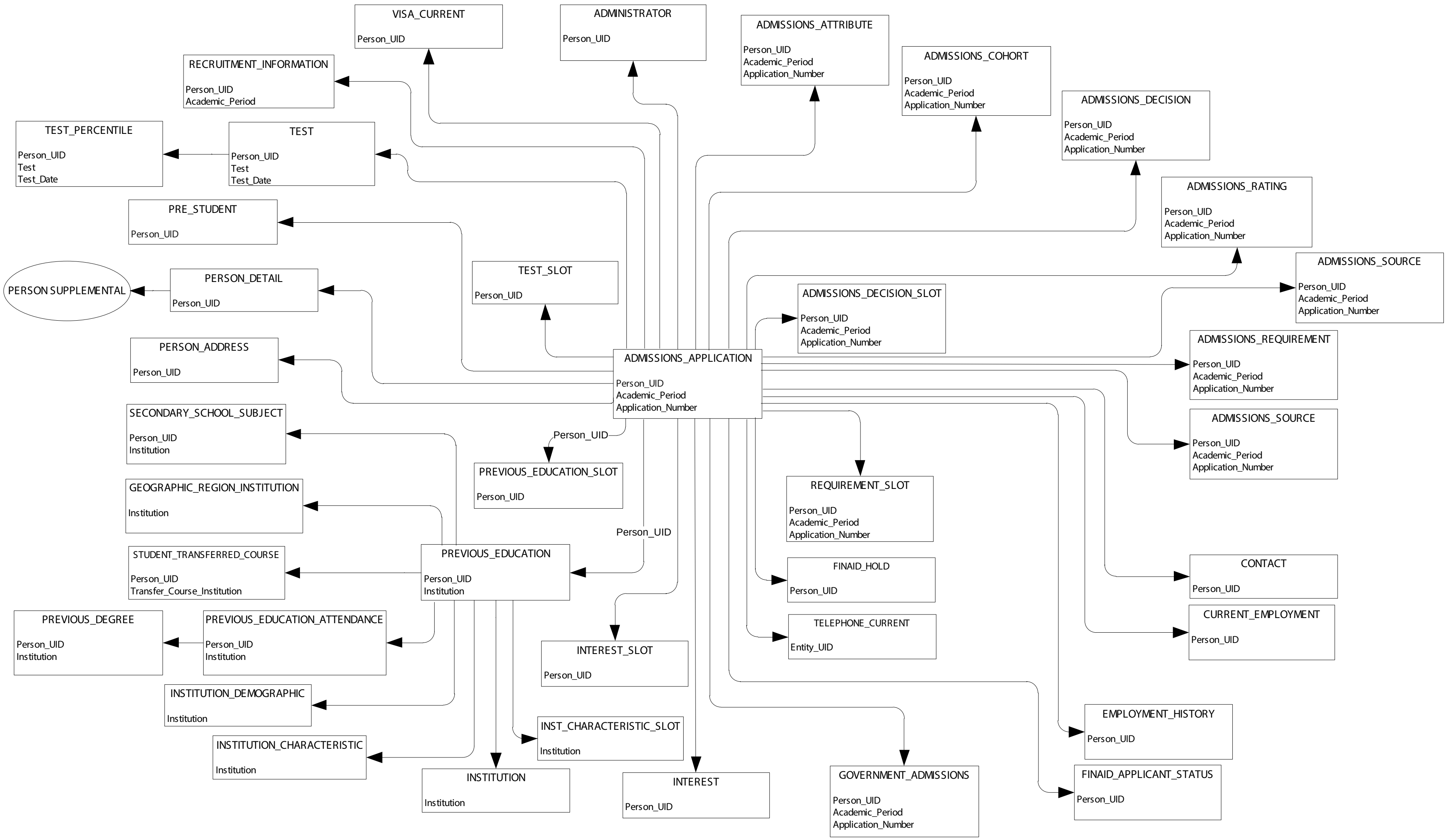
Student

Active Registration

Note that Person_UID on
Instructional_Assignment represents Faculty



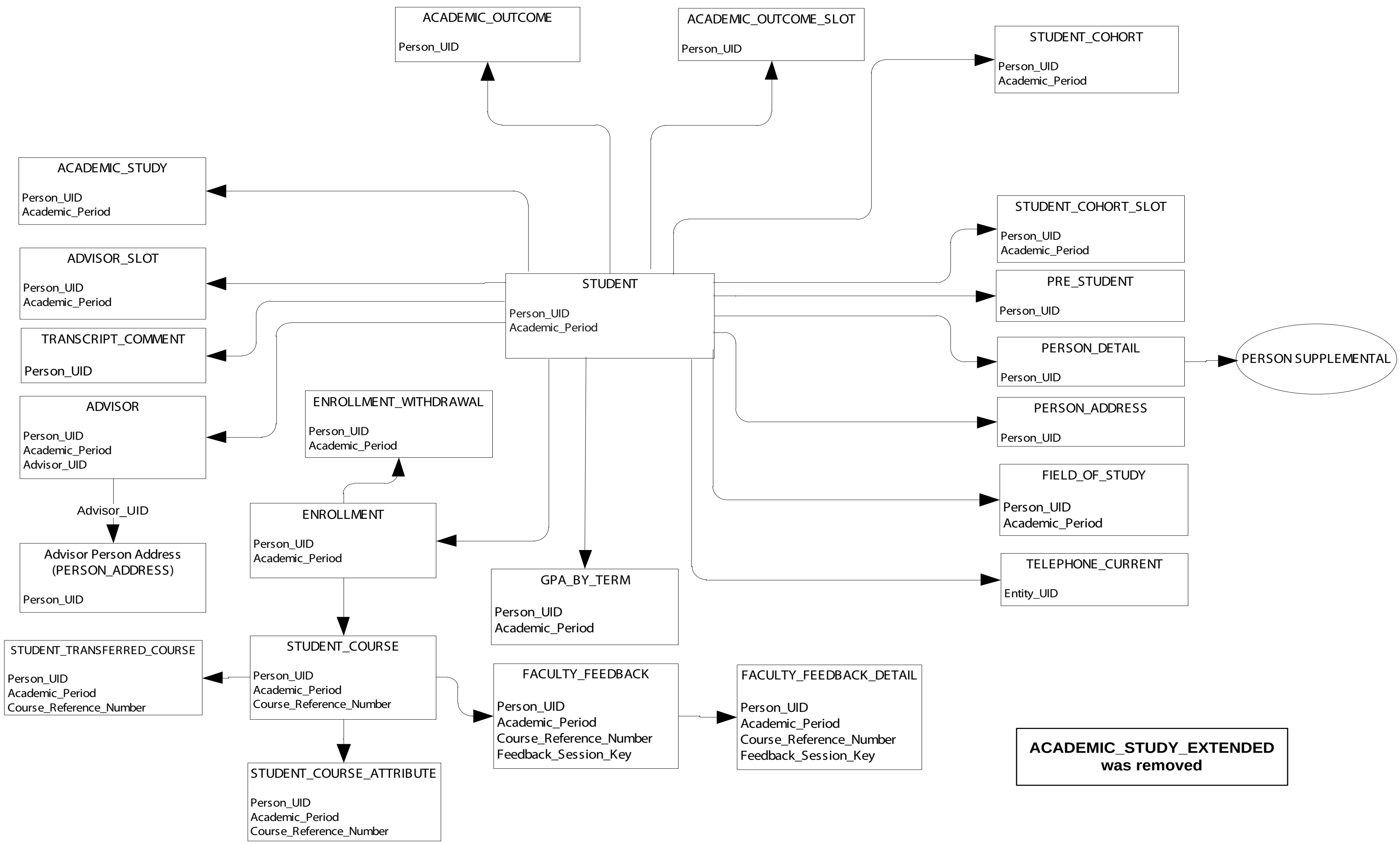
Admissions Application



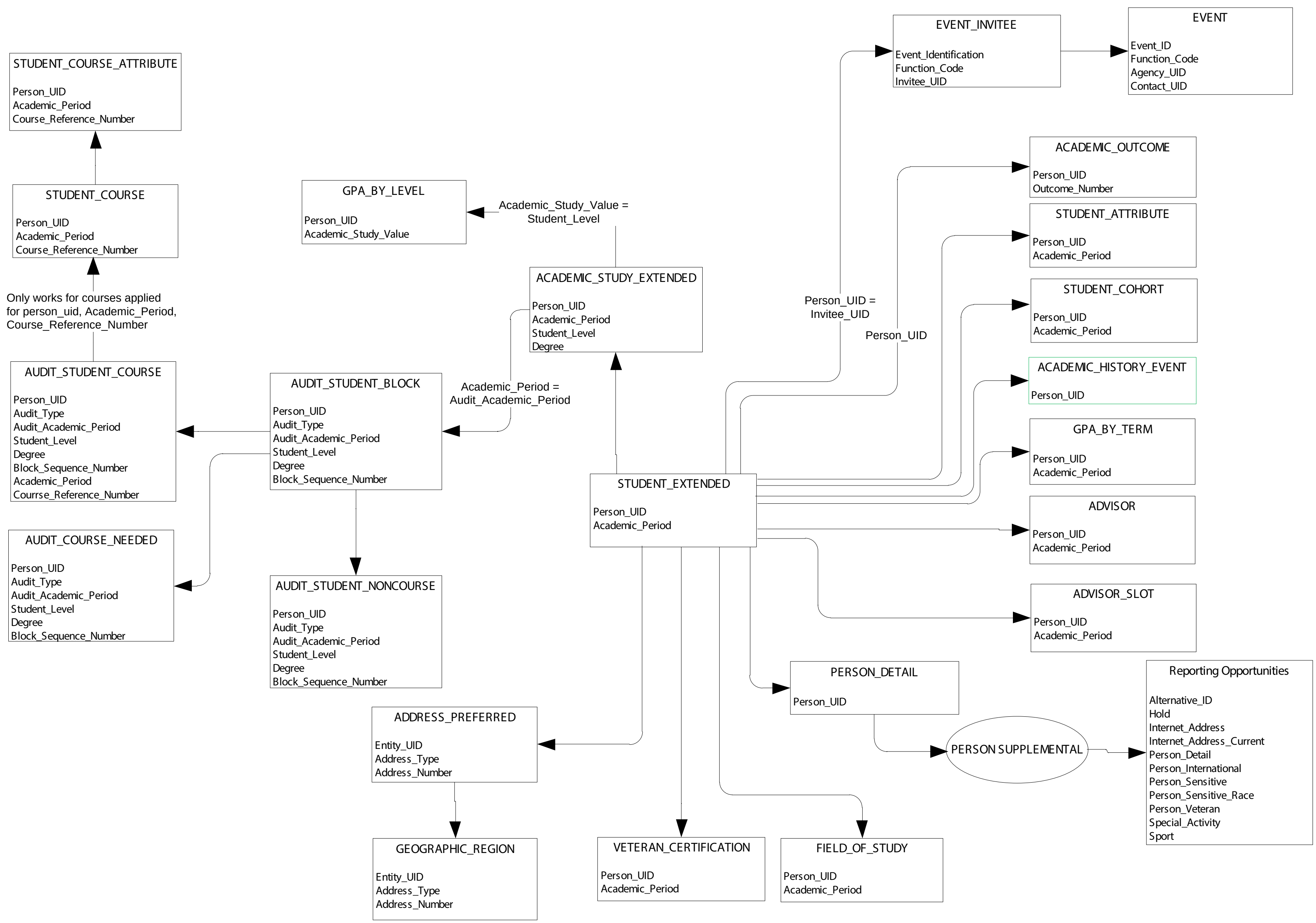
Determinants for Admissions Application:

Query Subject	Determinant Name	Determinant Columns
Admissions Application	UK_ADMISSIONS_APPLICATION	Person_UID Academic_Period Application_Number Curriculum_Priority_Number

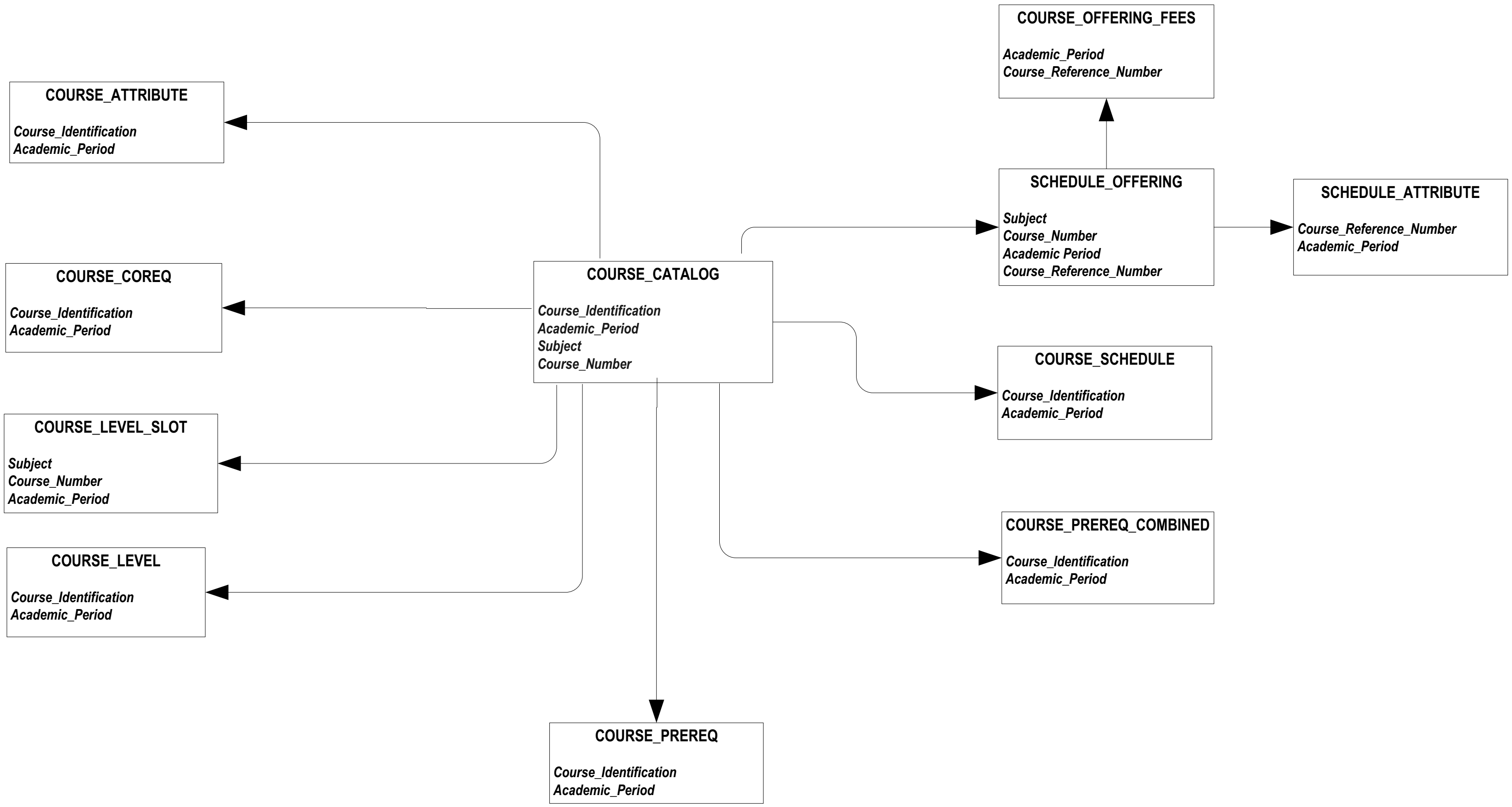
Advisor Student List



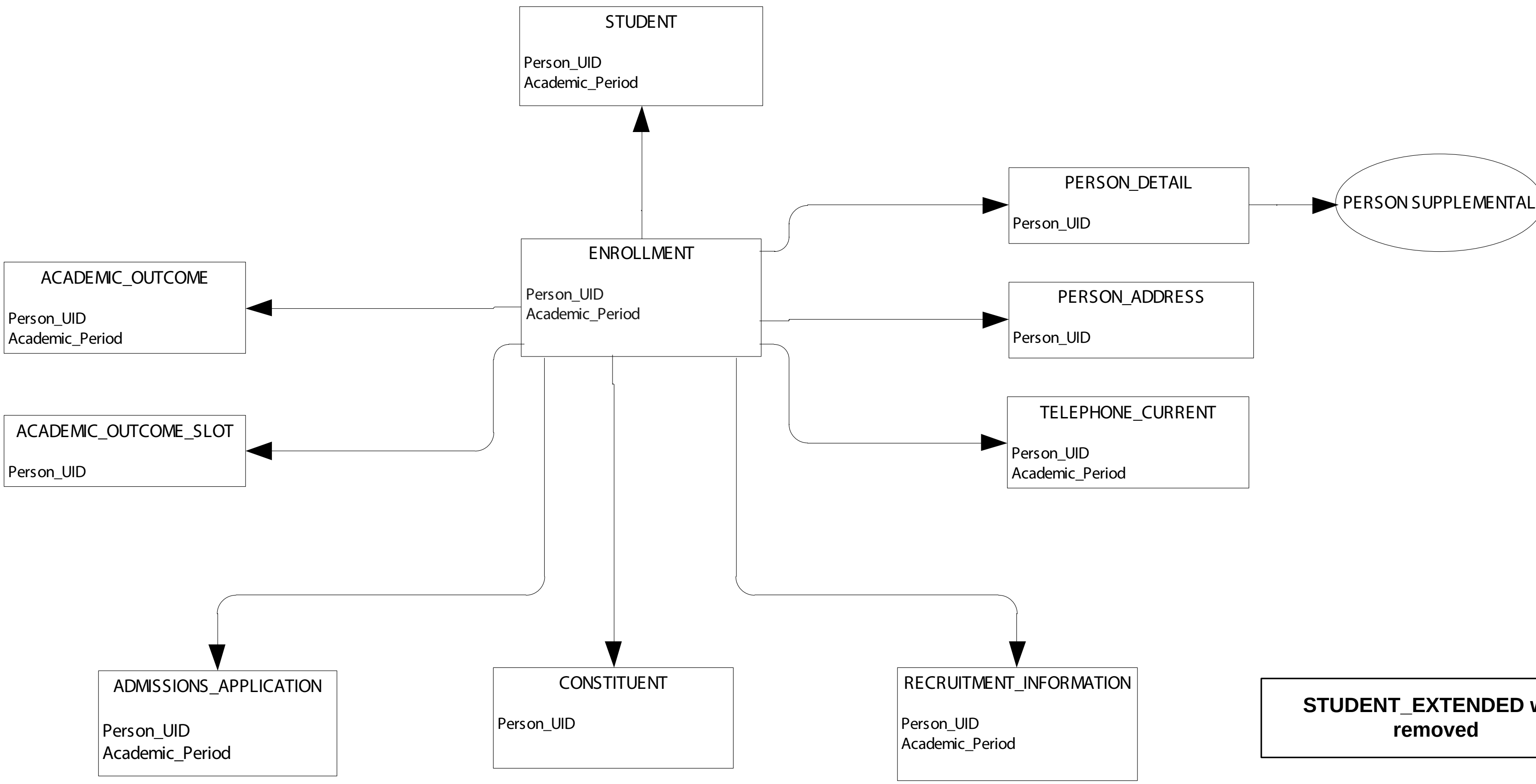
Audit Student


STUDENT_COURSE_ATTRIBUTE
Person_UID
Academic_Period
Course_Reference_Number
STUDENT_COURSE
Person_UID
Academic_Period
Course_Reference_Number
Only works for courses applied for person_uid, Academic_Period, Course_Reference_Number
AUDIT_STUDENT_COURSE
Person_UID
Audit_Type
Audit_Academic_Period
Student_Level
Degree
Block_Sequence_Number
Academic_Period
Courrse_Reference_Number
AUDIT_COURSE_NEEDED
Person_UID
Audit_Type
Audit_Academic_Period
Student_Level
Degree
Block_Sequence_Number
GPA_BY_LEVEL
Person_UID
Academic_Study_Value
Academic_Study_Value = Student_Level
ACADEMIC_STUDY_EXTENDED
Person_UID
Academic_Period
Student_Level
Degree
Academic_Period = Audit_Academic_Period
AUDIT_STUDENT_BLOCK
Person_UID
Audit_Type
Audit_Academic_Period
Student_Level
Degree
Block_Sequence_Number
AUDIT_STUDENT_NONCOURSE
Person_UID
Audit_Type
Audit_Academic_Period
Student_Level
Degree
Block_Sequence_Number
EVENT_INVITEE
Event_Identification
Function_Code
Invitee_UID
EVENT
Event_ID
Function_Code
Agency_UID
Contact_UID
Person_UID = Invitee_UID
Person_UID
ACADEMIC_OUTCOME
Person_UID
Outcome_Number
STUDENT_ATTRIBUTE
Person_UID
Academic_Period
STUDENT_COHORT
Person_UID
Academic_Period
ACADEMIC_HISTORY_EVENT
Person_UID
GPA_BY_TERM
Person_UID
Academic_Period
STUDENT_EXTENDED
Person_UID
Academic_Period
ADVISOR
Person_UID
Academic_Period
ADVISOR_SLOT
Person_UID
Academic_Period
PERSON_DETAIL
Person_UID
PERSON SUPPLEMENTAL
Reporting Opportunities
Alternative_ID
Hold
Internet_Address
Internet_Address_Current
Person_Detail
Person_International
Person_Sensitive
Person_Sensitive_Race
Person_Veteran
Special_Activity
Sport
ADDRESS_PREFERRED
Entity_UID
Address_Type
Address_Number
GEOGRAPHIC_REGION
Entity_UID
Address_Type
Address_Number
VETERAN_CERTIFICATION
Person_UID
Academic_Period
FIELD_OF_STUDY
Person_UID
Academic_Period

Course Catalog

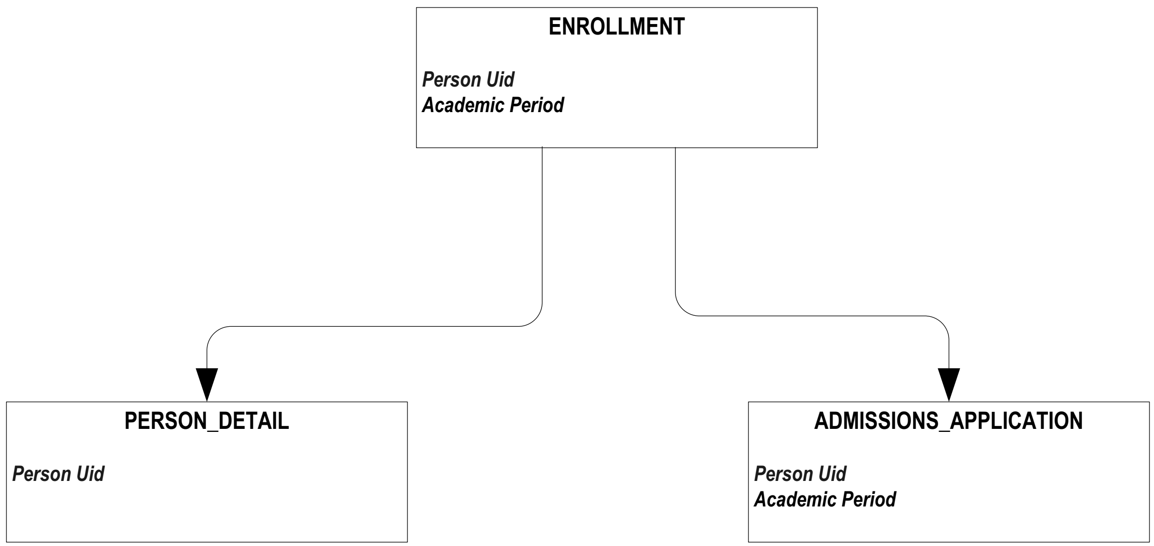


Enrollment Management

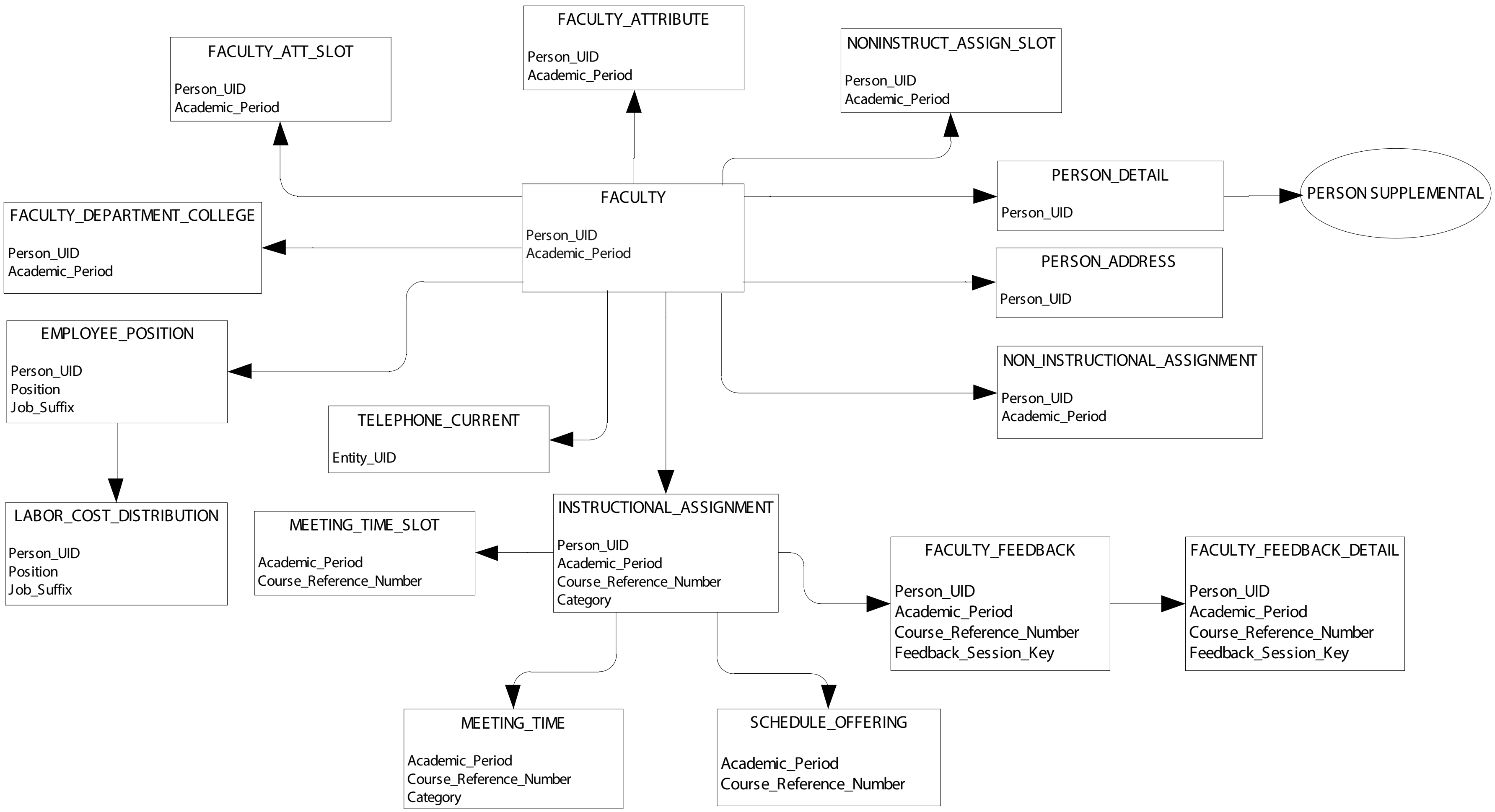


STUDENT_EXTENDED was removed

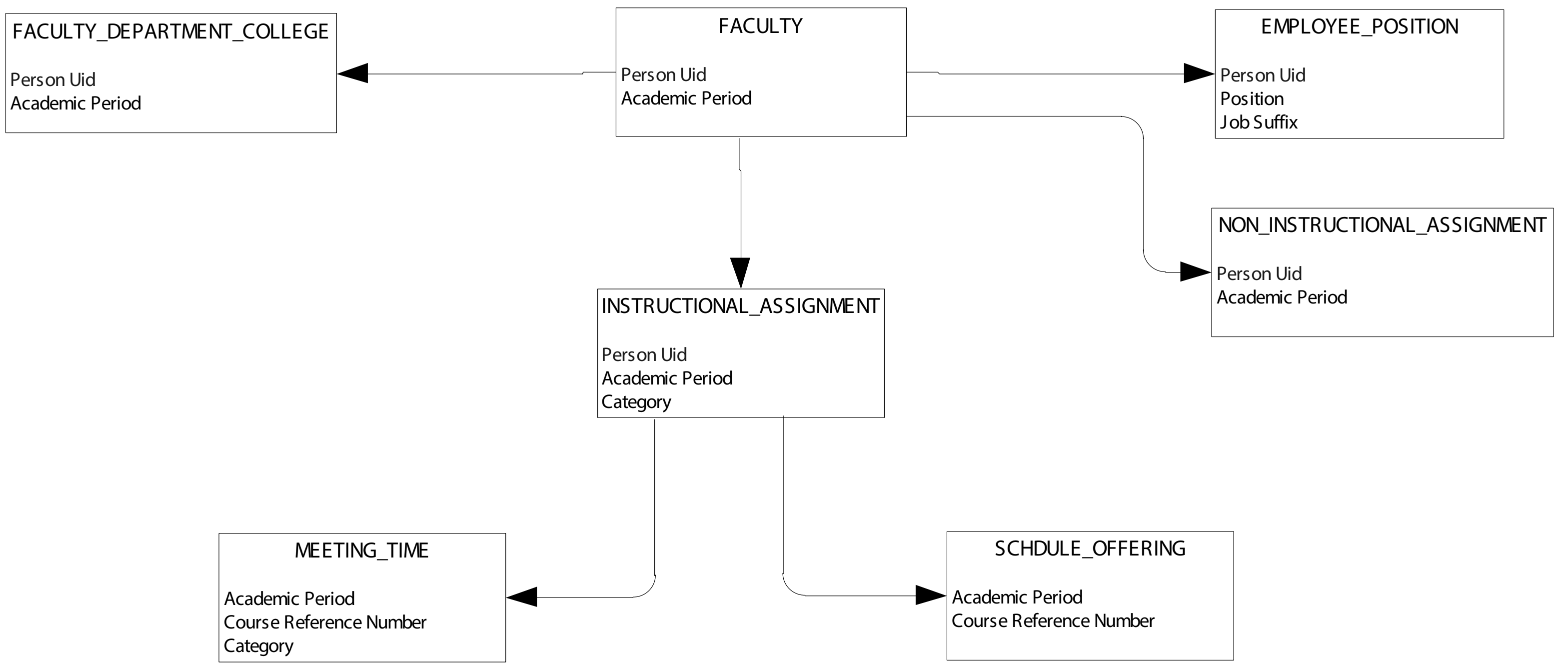
Enrollment Management Subset



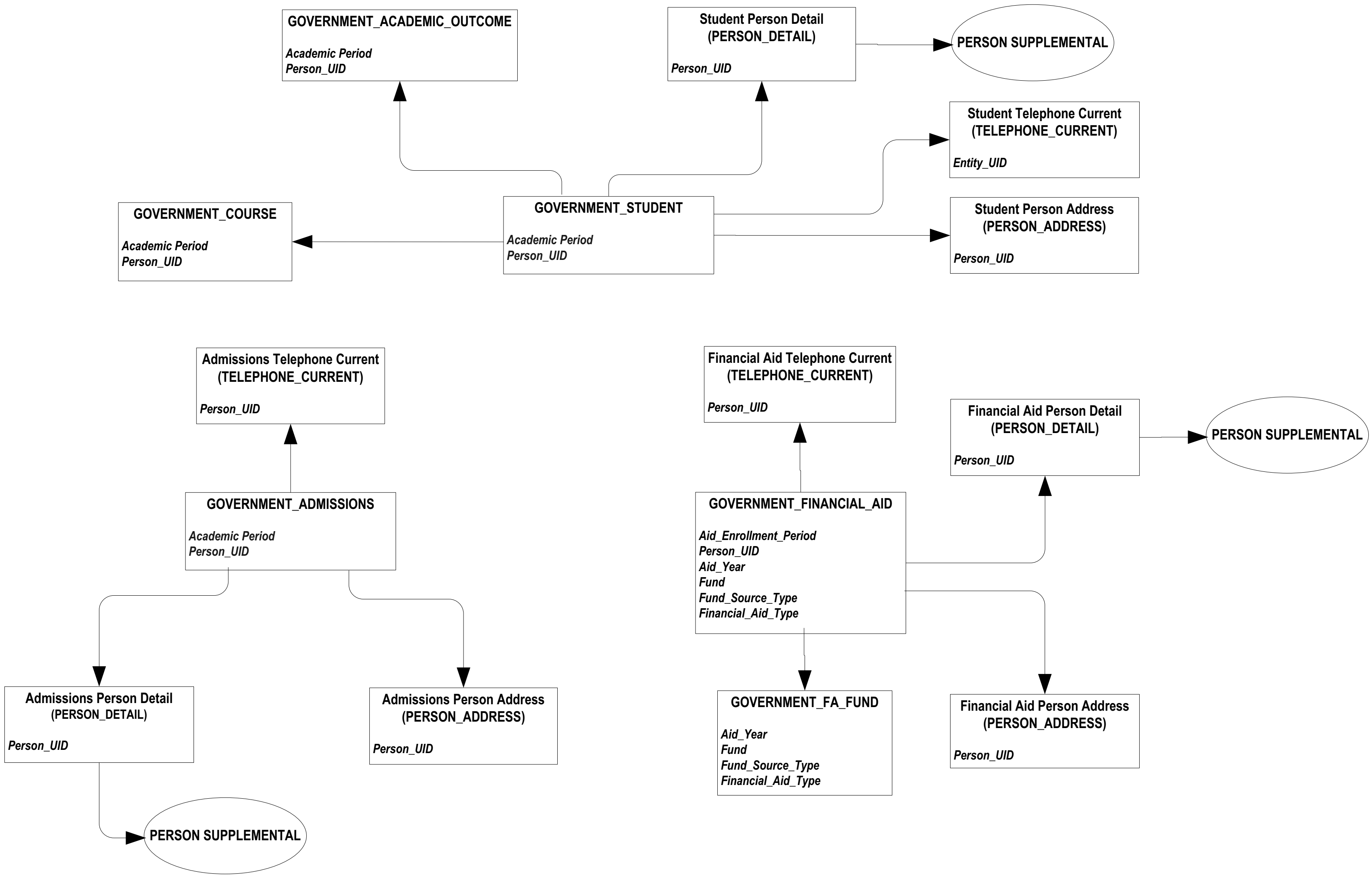
Faculty Assignment



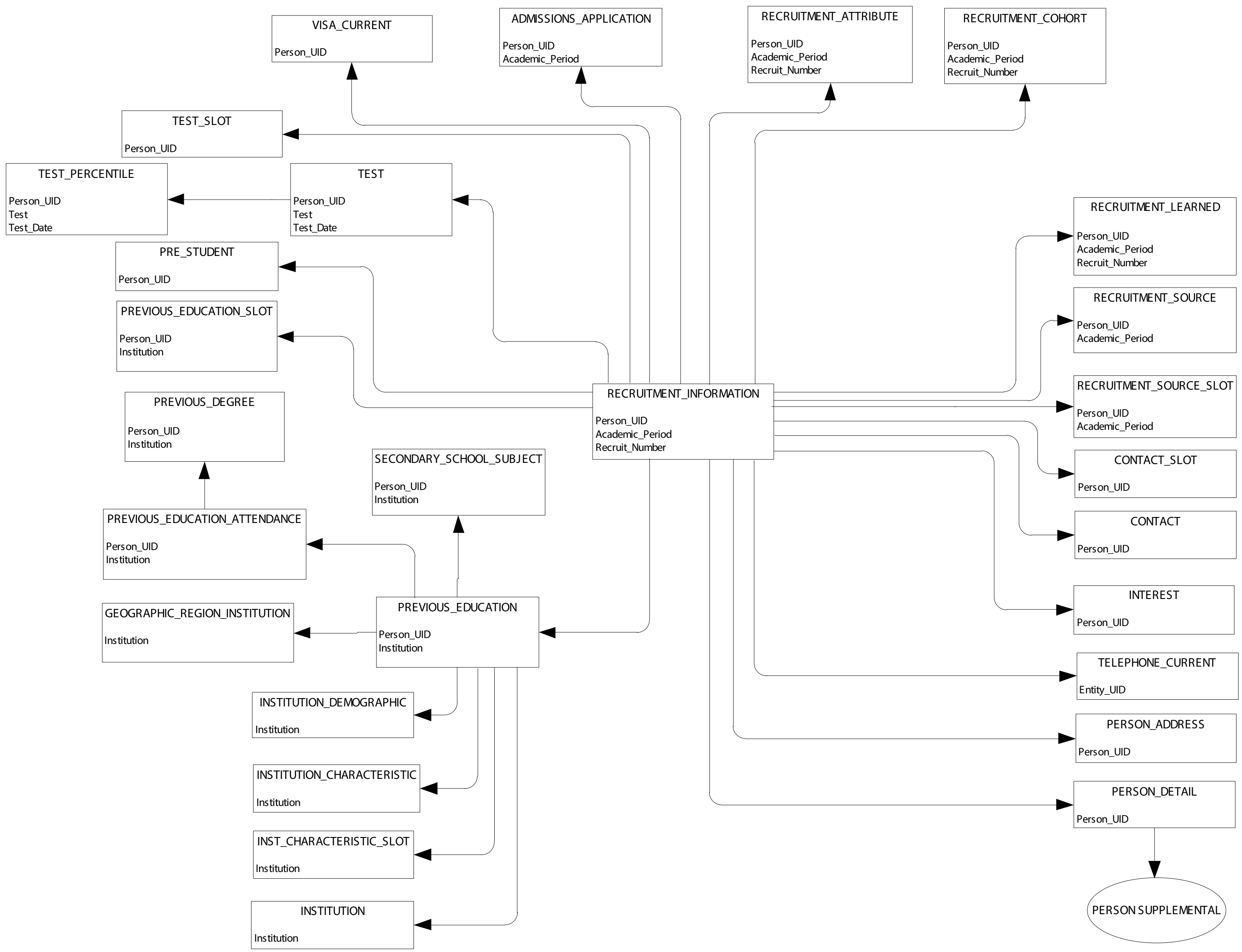
Faculty Subset



Government Reporting



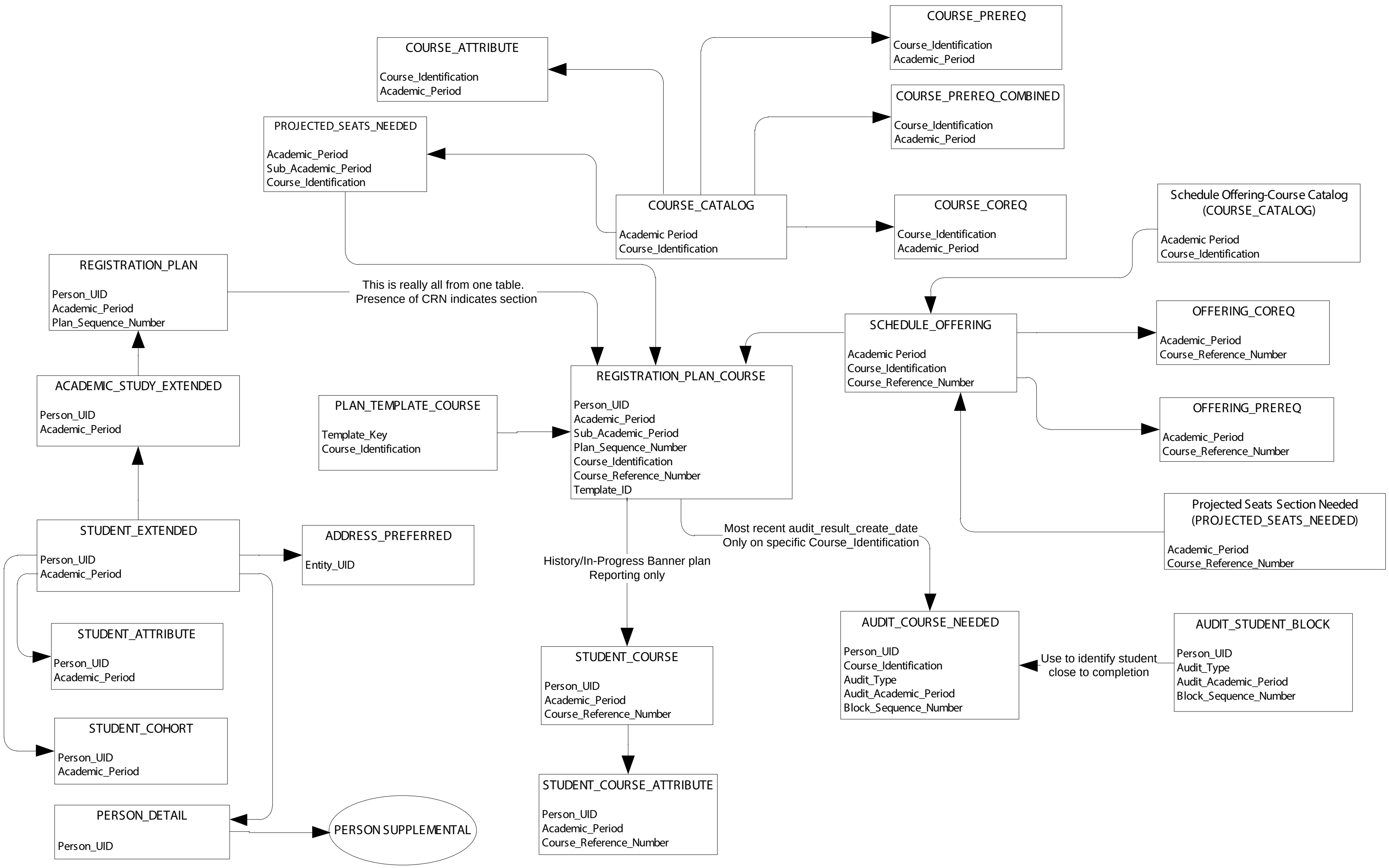
Recruitment Information


VISA_CURRENT
Person_UID
ADMISSIONS_APPLICATION
Person_UID
Academic_Period
RECRUITMENT_ATTRIBUTE
Person_UID
Academic_Period
Recruit_Number
RECRUITMENT_COHORT
Person_UID
Academic_Period
Recruit_Number
TEST_SLOT
Person_UID
TEST_PERCENTILE
Person_UID
Test
Test_Date
TEST
Person_UID
Test
Test_Date
PRE_STUDENT
Person_UID
PREVIOUS_EDUCATION_SLOT
Person_UID
Institution
PREVIOUS_DEGREE
Person_UID
Institution
SECONDARY_SCHOOL_SUBJECT
Person_UID
Institution
PREVIOUS_EDUCATION_ATTENDANCE
Person_UID
Institution
GEOGRAPHIC_REGION_INSTITUTION
Institution
PREVIOUS_EDUCATION
Person_UID
Institution
INSTITUTION_DEMOGRAPHIC
Institution
INSTITUTION_CHARACTERISTIC
Institution
INST_CHARACTERISTIC_SLOT
Institution
INSTITUTION
Institution
RECRUITMENT_INFORMATION
Person_UID
Academic_Period
Recruit_Number
RECRUITMENT_LEARNED
Person_UID
Academic_Period
Recruit_Number
RECRUITMENT_SOURCE
Person_UID
Academic_Period
RECRUITMENT_SOURCE_SLOT
Person_UID
Academic_Period
CONTACT_SLOT
Person_UID
CONTACT
Person_UID
INTEREST
Person_UID
TELEPHONE_CURRENT
Entity_UID
PERSON_ADDRESS
Person_UID
PERSON_DETAIL
Person_UID
PERSON SUPPLEMENTAL

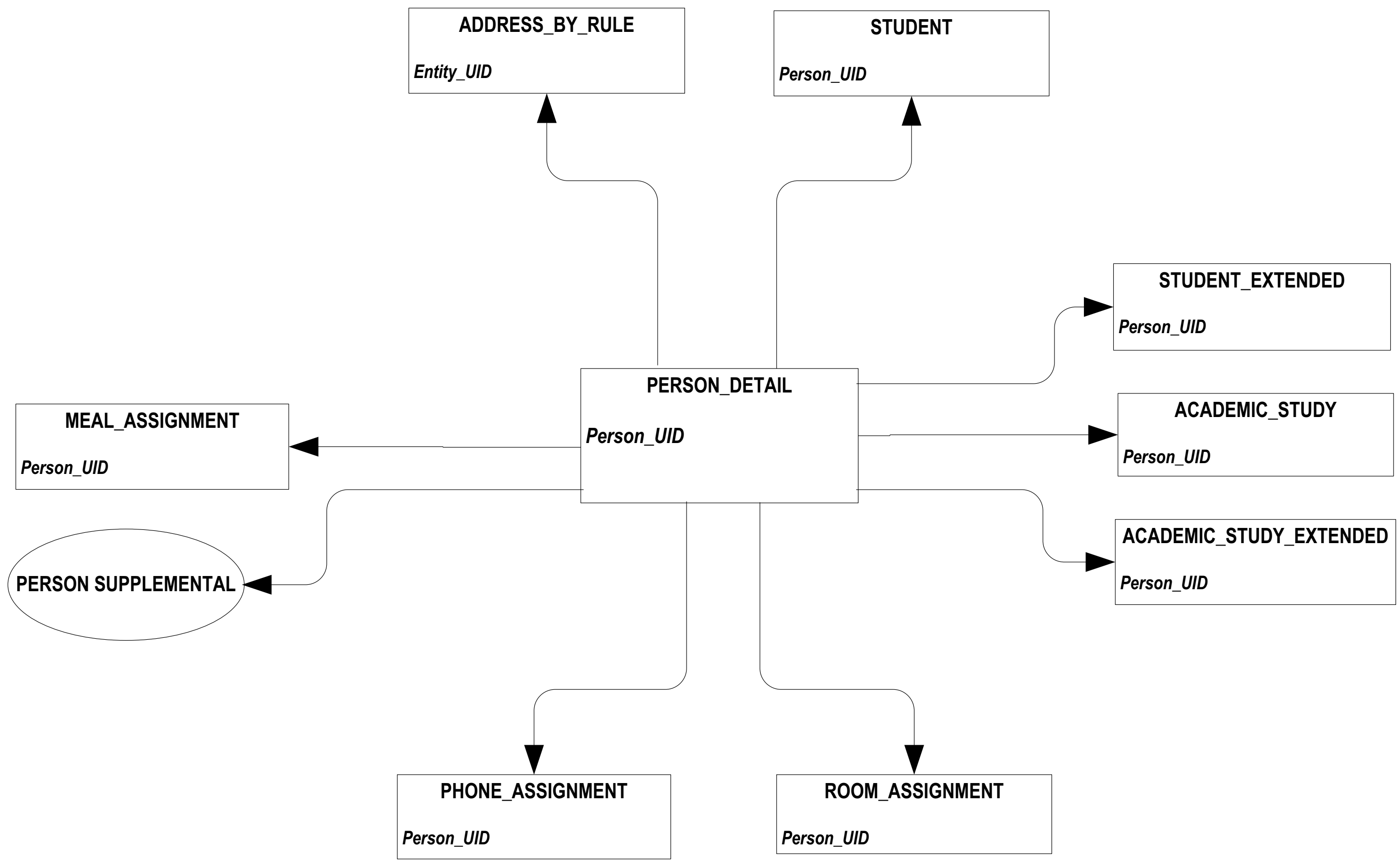
Determinants for Recruitment Information:

Query Subject	Determinant Name	Determinant Columns
Recruitment Information	UK_RECRUITMENT_INFORMATION	Person_UID
		Academic_Period
		Recruit_Number
		Curriculum_Priority_Number

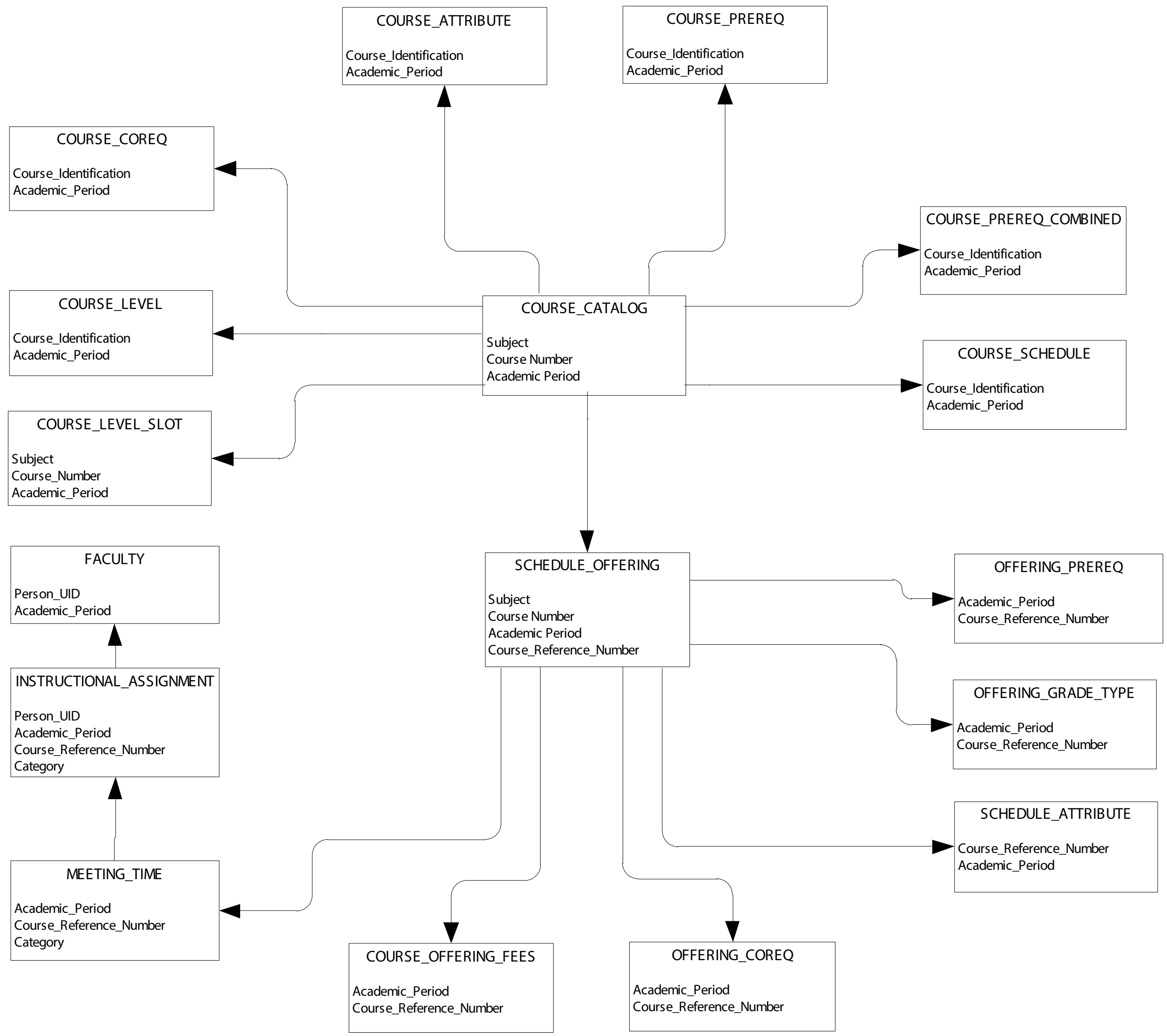
Registration Plan



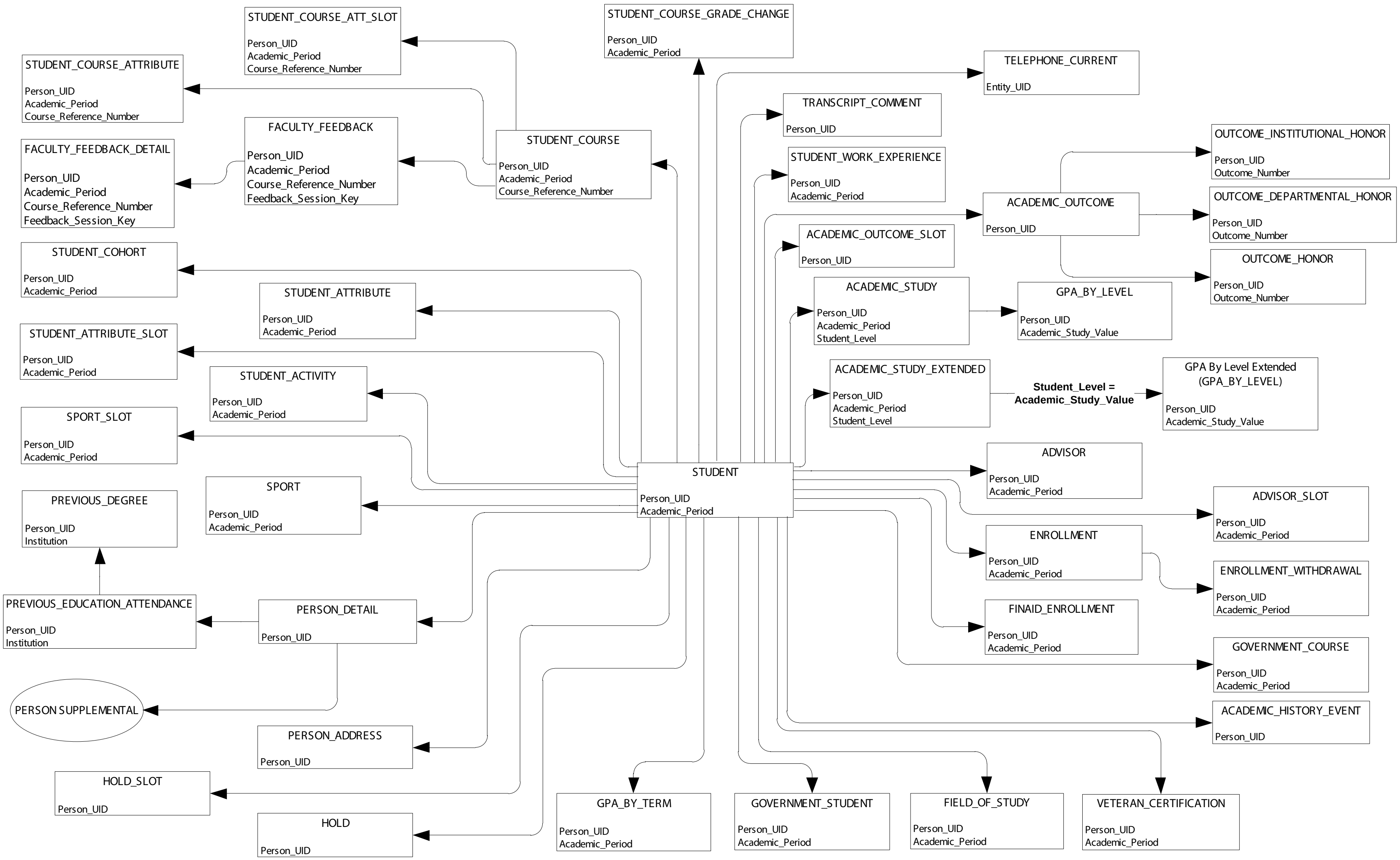
Residential Life



Schedule Offering



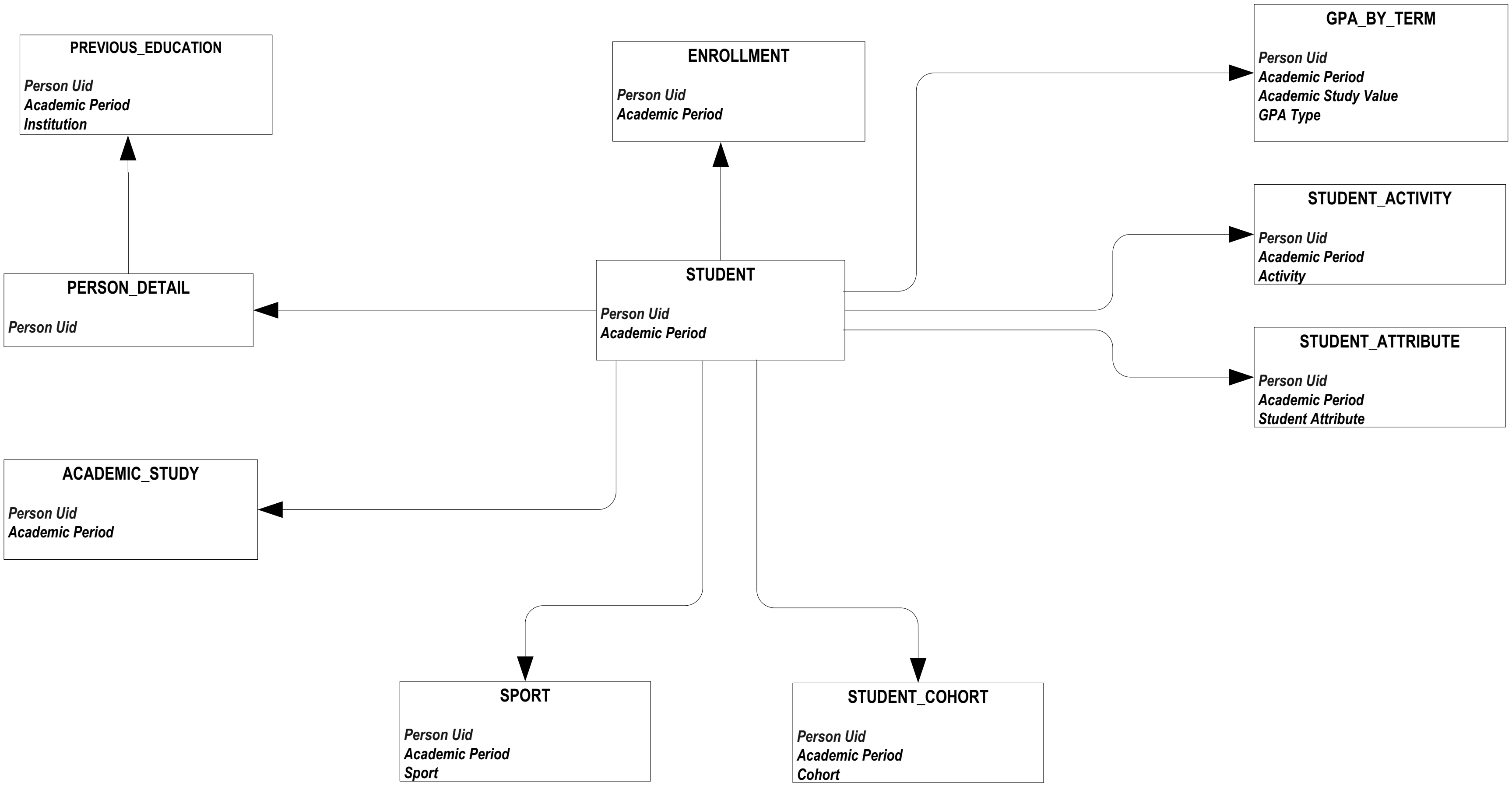
Student Detail



Determinants for Student Detail:

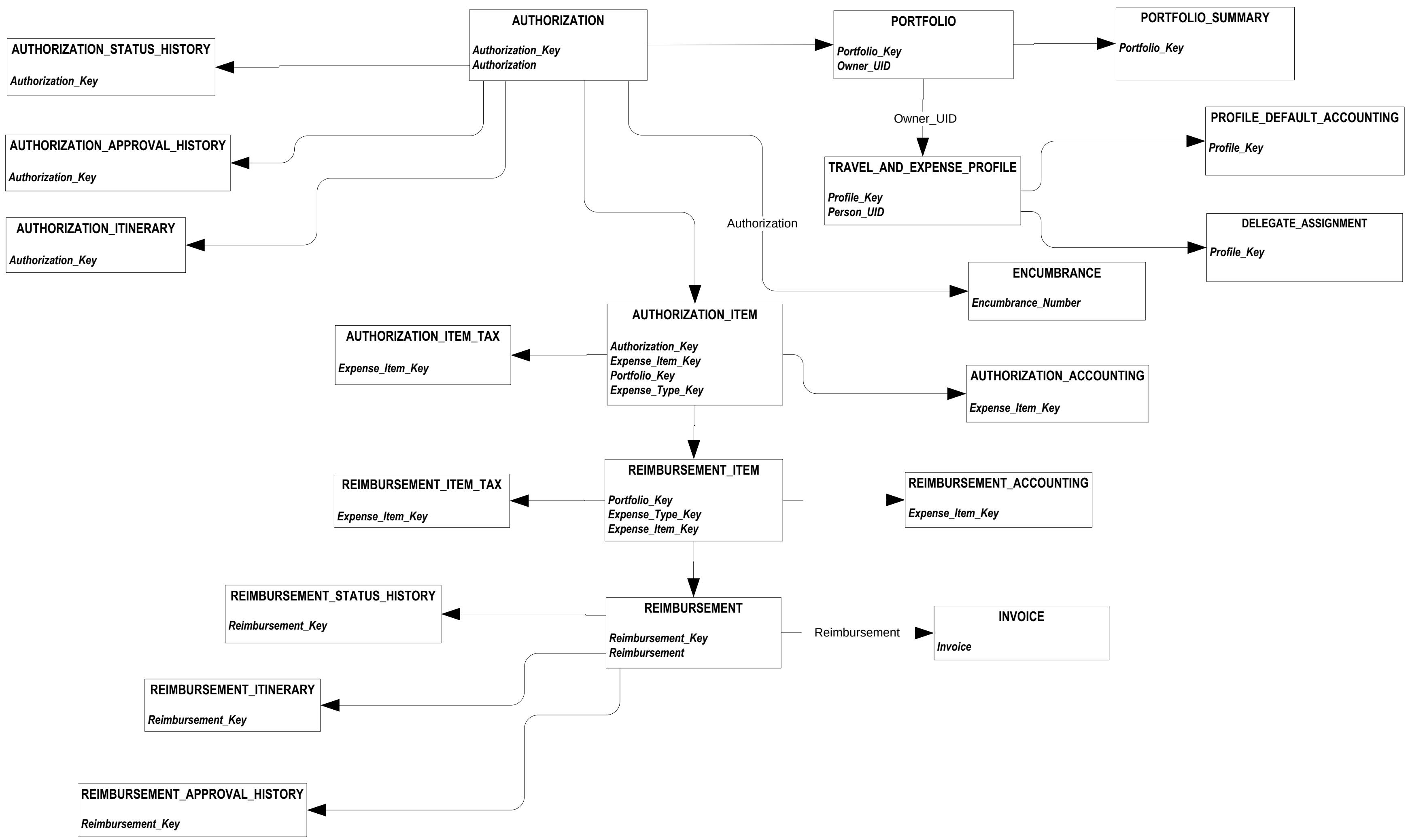
Query Subject	Determinant Name	Determinant Columns
Student	UK_STUDENT	Person_UID Academic_Period
Student Extended	UK_STUDENT_EXTENDED	Person_UID Academic_Period

Student Detail Subset

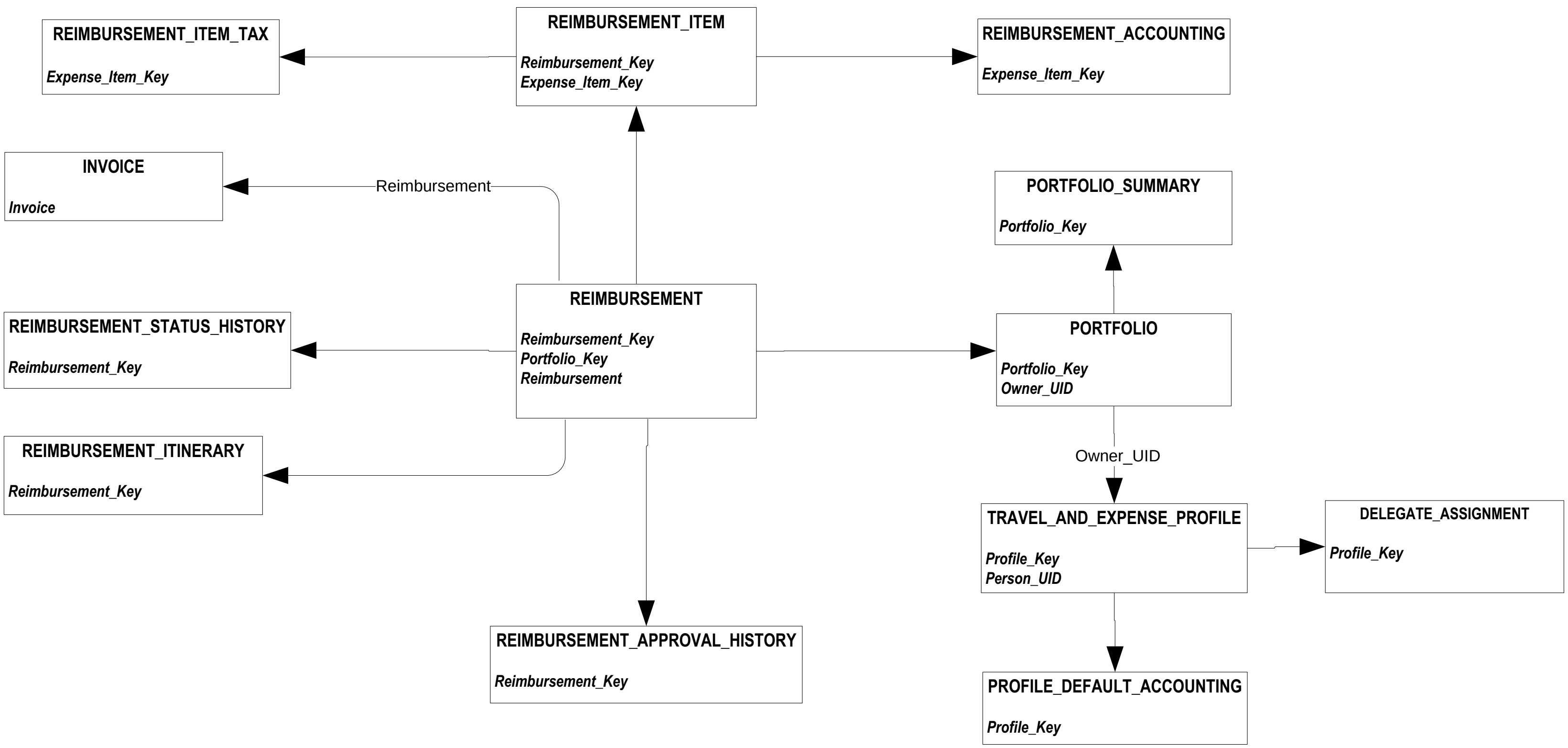


Travel and Expense

Authorization



Reimbursement



Oracle Business Intelligence Discoverer

Delivered EULs

The structure of the business areas delivered in the Oracle Discoverer EUL is designed to mimic the business concepts in the ODS meta data. The EUL contains 51 organized Business Concepts which help users identify which reporting views to use when trying to write a report in a specific business area.

The older style EUL delivered in the Banner ODS 2.0 up to the Banner ODS 3.0 was also delivered for the Banner ODS 3.1. This EUL consists of just 3 Business Area. The main Business Area being the Banner ODS – Reporting Views that comprised all of the Banner ODS Reporting Views and their logical joins to other reporting views.

This EUL has been synchronized with the subsequent Banner ODS releases and delivered so that existing reports written against this style EUL could continue to run without breaking in Banner ODS 3.1.Currently clients have the option of installing 1, both or none of these EULs.

Below are the scenarios that may help your institution decide which EUL to import moving forward:

Existing institutions that wrote reports against the EUL in Banner ODS 3.0 or earlier

- Import and continue to use the old style EUL and not import the new style EUL.

  We will continue to support the old style EUL.

- Continue to use the old style EUL and also create a separate schema to import the new EUL.

  In this scenario institutions can run their old reports against the older style EUL and create their new ones against the new EUL if they like the newer style EUL. In order for this scenario to happen 2 EUL schemas would need to be up and running. You cannot import both .eex files into the same EUL.

- Only import and use the new EUL.

  This option would require institutions to potentially have to modify existing reports that were written against the old style EUL.

Clients new to the Banner ODS can use either EUL, but we recommend that you use the new style EUL to benefit from the additional functionality.

Lists of Values

A list of values (LOV) is a set of valid values for a column in a Banner ODS reporting view. List of value views are contained within the ODSLOV schema within the Banner ODS. The LOV views obtain their information from the Banner ODS composite table called MGT_VALIDATION. The meta data layers are shipped containing lists of values to be used for drop-down lists or filters in queries and reports. The views contained within the ODSLOV schema provide the data which populates these lists of values.

See the ODSLOV List of Values section in List of Value Views for the complete list of ODSLOV list of value views. The values also exist in Oracle Business Intelligence Discoverer and Cognos 8 Business Intelligence with the exact same names as the LOV views but without the underscores.

In Oracle Business Intelligence Discoverer, there is a business area that contains folders for each of the ODSLOV views. The business view and area are called “List of Values”.

Lists of Values – Item Classes

List of value folders in Oracle Business Intelligence Discoverer are used to create items classes in Oracle Business Intelligence Discoverer Administrator. Item classes are groups of items that share some similar properties. An item class enables you to define item properties once, and then assign the item class to other items that share similar properties.

Example

The Academic Period LOV folder includes an item called Academic Period that describes each academic period. A similar item also called Academic Period is contained in the Academic Outcome folder.

To enable both items to share common properties (for example, a list of values), we created an item class from the list of value folder to define the properties, and applied it to both items. So, the list of values only had to be defined once from the ODSLOV view.

Note: You may notice that when using this approach there may be academic periods in the Academic Period LOV folder that are not in the Academic Outcome folder. However, accessing the list from the ODSLOV view is faster than accessing one created from the reporting view.

If you need a list of values that exactly matches the values in the reporting view column, you can create an item class from a reporting view column similarly to how it was created from the ODSLOV views.

Oracle Business Intelligence Discoverer end users use lists of values to display values or enter values in parameters and conditions.

A table of Oracle Business Intelligence Discoverer item classes that have been assigned to reporting view columns displays below. There are many more item classes that can be create from the list of value views. The following table lists the ones that are currently provided:

Table 1: Item Classes

Item Class	Item Class	Item Class
Lov Academic Period.Value	Lov Division.Value	Lov Native Language.Value
Lov Academic Period.Value Description	Lov Division.Value Description	Lov Native Language.Value Description
Lov Academic Standing.Value	Lov Earnings.Value	Lov Organization Level 1.Value
Lov Academic Standing.Value Description	Lov Earnings.Value Description	Lov Organization Level 2.Value
Lov Academic Title.Value	Lov Educational Goal.Value	Lov Organization Level 3.Value
Lov Academic Year.Value	Lov Educational Goal.Value Description	Lov Organization Level 4.Value
Lov Academic Year.Value Description	Lov Eeo Skill.Value	Lov Organization Level 5.Value
Lov Account Class.Value	Lov Eeo Skill.Value Description	Lov Organization Level 6.Value
Lov Account Class.Value Description	Lov Employee Class.Value	Lov Organization Level 7.Value
Lov Account Level 1.Value	Lov Employee Group.Value	Lov Organization Pool.Value
Lov Account Level 2.Value	Lov Employee Group.Value Description	Lov Organization Pool.Value Description
Lov Account Level 3.Value	Lov Employee Status.Value	Lov Packaging Group.Value
Lov Account Level 4.Value	Lov Employee Status.Value Description	Lov Packaging Group.Value Description
Lov Account Pool.Value	Lov Employer Category.Value	Lov Position Change Reason.Value
Lov Account Pool.Value Description	Lov Employer Category.Value Description	Lov Position Change Reason.Value Description
Lov Account Type Level 1.Value	Lov Employer Industrial Type.Value	Lov Position Class.Value
Lov Account Type Level 2.Value	Lov Employer.Value	Lov Position Class.Value Description
Lov Activity Category.Value	Lov Employer.Value Description	Lov Position Deferred Pay.Value

Table 1: Item Classes

Item Class	Item Class	Item Class
Lov Activity Category.Value Description	Lov Employment Status.Value	Lov Position Deferred Pay.Value Description
Lov Activity Type.Value	Lov Employment Status.Value Description	Lov Position Location.Value
Lov Activity Type.Value Description	Lov Enrollment Status.Value	Lov Position Location.Value Description
Lov Activity.Value	Lov Enrollment Status.Value Description	Lov Position Status.Value
Lov Activity.Value Description	Lov Fiscal Period.Value	Lov Position Status.Value Description
Lov Address Type.Value	Lov Fiscal Year.Value	Lov Position.Value
Lov Address Type.Value Description	Lov Foreign Currency.Value	Lov Pref Class.Value
Lov Admissions Attribute.Value	Lov Foreign Currency.Value Description	Lov Pref Class.Value Description
Lov Admissions Attribute.Value Description	Lov Fund Level 1.Value	Lov Prim Disability.Value
Lov Admissions Population.Value	Lov Fund Level 2.Value	Lov Prim Disability.Value Description
Lov Admissions Population.Value Description	Lov Fund Level 3.Value	Lov Program Classification.Value
Lov Advisor Name Lfmi.Value	Lov Fund Level 4.Value	Lov Program Classification.Value Description
Lov Advisor Type.Value	Lov Fund Level 5.Value	Lov Program Level 1.Value
Lov Advisor Type.Value Description	Lov Fund Pool.Value	Lov Program Level 2.Value
Lov Aid Year.Value	Lov Fund Pool.Value Description	Lov Program Level 3.Value
Lov Aid Year.Value Description	Lov Fund Source.Value	Lov Program Level 4.Value
Lov Application Status.Value	Lov Fund Source.Value Description	Lov Program.Value
Lov Application Status.Value Description	Lov Fund Type Level 1.Value	Lov Program.Value Description
Lov Assignment Grade.Value	Lov Fund Type Level 2.Value	Lov Progress Evaluation.Value
Lov Assignment Pay Id.Value	Lov Fund Type.Value	Lov Progress Evaluation.Value Description

Table 1: Item Classes

Item Class	Item Class	Item Class
Lov Assignment Pay Id.Value Description	Lov Fund Type.Value Description	Lov Project.Value
Lov Assignment Salary Group.Value	Lov Gender.Value	Lov Project.Value Description
Lov Assignment Salary Group.Value Description	Lov Gender.Value Description	Lov Prospect Status.Value
Lov Award Category.Value	Lov Grade Type.Value	Lov Rating Type.Value
Lov Award Category.Value Description	Lov Grade Type.Value Description	Lov Rating Type.Value Description
Lov Benefit Category.Value	Lov Grant.Value Description	Lov Rating.Value
Lov Benefit Category.Value Description	Lov Hold.Value	Lov Rating.Value Description
Lov Block Schedule.Value	Lov Hold.Value Description	Lov Recruiter.Value
Lov Block Schedule.Value Description	Lov Income Level.Value	Lov Recruiter.Value Description
Lov Budget Group.Value	Lov Income Level.Value Description	Lov Registration Reason.Value
Lov Budget Group.Value Description	Lov Installment Plan.Value	Lov Registration Reason.Value Description
Lov Budget Phase.Value	Lov Installment Plan.Value Description	Lov Registration Status.Value
Lov Budget Phase.Value Description	Lov Instruction Method.Value	Lov Registration Status.Value Description
Lov Budget.Value	Lov Instruction Method.Value Description	Lov Residency.Value
Lov Building.Value	Lov Instructional Method.Value	Lov Residency.Value Description
Lov Building.Value Description	Lov Instructional Method.Value Description	Lov Review Type.Value
Lov Campaign Type.Value	Lov Instructor Name.Value	Lov Review Type.Value Description
Lov Campaign Type.Value Description	Lov Internal Account Type.Value	Lov Schedule Type.Value
Lov Campaign.Value	Lov Internal Account Type.Value Description	Lov Schedule Type.Value Description
Lov Campus.Value	Lov Internal Fund Type.Value	Lov Secondary School.Value

Table 1: Item Classes

Item Class	Item Class	Item Class
Lov Campus.Value Description	Lov Internal Fund Type.Value Description	Lov Site.Value
Lov Certification.Value	Lov Job Leave Category.Value	Lov Site.Value Description
Lov Certification.Value Description	Lov Job Leave Category.Value Description	Lov State Province.Value
Lov Chart Of Accounts.Value	Lov Job Suffix.Value	Lov State Province.Value Description
Lov Chart Of Accounts.Value Description	Lov Leadership Role.Value	Lov Student Population.Value
Lov Cohort.Value	Lov Leadership Role.Value Description	Lov Student Population.Value Description
Lov Cohort.Value Description	Lov Leave Of Absence Reason.Value	Lov Student Status.Value
Lov Collection Agency Name.Value	Lov Leave Of Absence Reason.Value Description	Lov Student Status.Value Description
Lov College.Value	Lov Legacy.Value	Lov Sub Academic Period.Value
Lov College.Value Description	Lov Legacy.Value Description	Lov Sub Academic Period.Value Description
Lov Commodity.Value	Lov Location Level 1.Value	Lov Subject.Value
Lov Commodity.Value Description	Lov Location Level 2.Value	Lov Subject.Value Description
Lov Contract Number.Value	Lov Location Level 3.Value	Lov Termination Reason.Value
Lov Contract Type.Value	Lov Location Level 4.Value	Lov Termination Reason.Value Description
Lov Contract Type.Value Description	Lov Mail.Value	Lov Test Rule.Value
Lov County.Value	Lov Mail.Value Description	Lov Test.Value
Lov County.Value Description	Lov Major.Value	Lov Test.Value Description
Lov Course Attribute.Value	Lov Major.Value Description	Lov Tracking Group.Value
Lov Course Attribute.Value Description	Lov Marital Status.Value	Lov Tracking Group.Value Description
Lov Course Identification.Value	Lov Marital Status.Value Description	Lov Vendor Type.Value
Lov Course Reference Number.Value	Lov Meal Plan.Value	Lov Vendor Type.Value Description

Table 1: Item Classes

Item Class	Item Class	Item Class
Lov Current Time Status.Value	Lov Meal Plan.Value Description	Lov Veteran Category.Value
Lov Current Time Status.Value Description	Lov Meeting Type.Value	Lov Veteran Category.Value Description
Lov Department.Value	Lov Meeting Type.Value Description	Lov Worker Compensation Class.Value
Lov Department.Value Description	Lov Nation.Value	Lov Worker Compensation Class.Value Description
Lov Designation.Value	Lov Nation.Value Description	

Conditions

Information from reporting views in the Banner ODS can be filtered using objects in the reporting tool meta data layer. In Oracle Business Intelligence Discoverer, they are called conditions.

The table at the bottom of this section identifies which conditions are set up in the Oracle Business Intelligence Discoverer EUL.

Table 2: Oracle Business Intelligence Discoverer Objects and their definitions

Oracle Business Intelligence Discoverer Object	Definition
Condition Name	A name for the condition on the reporting view.
Formula	An expression that is used to generate a where clause when querying the Reporting View.
Folder Name	An Oracle Business Intelligence Discoverer folder that represents a Banner ODS Reporting View.
Business Area	A logical grouping of Banner ODS Reporting Views.
Optional vs. Mandatory	If a condition is optional, it is visible in Oracle Business Intelligence Discoverer Plus and can be added to a workbook. If it is mandatory, it is invisible, and always applied to a folder.

Table 3: Conditions set up in the Oracle Business Intelligence Discoverer EUL

Condition Name	Formula	Folder Name	Business Area	Optional vs. Mandatory
Endowment Distribution Document Type	Document Type = 20	Transaction History	Endowment Distribution	Optional
			Transaction History	Optional
Fixed Asset Adjustment Document Type	Document Type = 60	Transaction History	Fixed Asset	Optional
			Transaction History	Optional
Invoice Document Type	Document Type = 3	Transaction History	Invoice Payable	Optional
			Transaction History	Optional
Purchasing Document Type	Document Type = 2	Transaction History	Purchasing Payable	Optional
			Transaction History	Optional
Encumbrance Ledger Indicator	Ledger Indicator = 'E'	Transaction History	Encumbrance	Optional
			Transaction History	Optional
General Ledger Indicator	Ledger Indicator = 'G'	Transaction History	General Ledger	Optional
			Receivable Revenue	Optional
			Transaction History	Optional
Operating Ledger Indicator	Ledger Indicator = 'O'	Transaction History	Grant Ledger	Optional
			Operating Ledger	Optional
			Transaction History	Optional
Status = 'A'	Status = 'A'	Employee	Benefit Deduction	Mandatory
Status Disposition = 'U'	Status Disposition = 'U'	Hr Application	Human Resource Application	Mandatory
			Person Role	Mandatory

Date Hierarchies

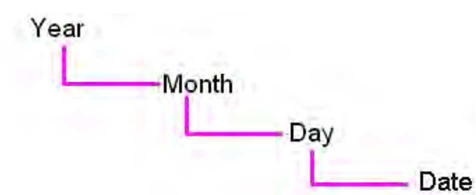
Hierarchies are logical relationships between items that enable you to drill up and down to view more or less detail. To analyze information effectively, Oracle Business Intelligence Discoverer end users should:

- Drill down to see more detail. The Year to Month to Day to Date, for example.
- Drill up to see how the detail contributes to information at a higher level. The Date to Day to Month to Year, for example.

Note: Oracle Business Intelligence Discoverer automatically creates default date hierarchies against date items when you import a reporting view into the End User Layer (EUL) using Oracle Business Intelligence Discoverer Administrator. However, these default date hierarchies can cause performance issues.

Oracle Business Intelligence Discoverer adds additional date items to a folder with default date hierarchies, using a function to populate the values returned for these items. This keeps queries that include these date items from using any indexes on the folder. Therefore the Ellucian date hierarchy replaces the Oracle Business Intelligence Discoverer default date hierarchies.

The EUL uses the CALENDAR_DATE_HIERARCHY reporting view to specify time periods needed for the hierarchy. Below is an example of the calendar date hierarchy used in the EUL.



A number of date folders are provided based on the CALENDAR_DATE_HIERARCHY reporting view. Each folder has a hierarchy defined on it. The table below lists the date folders in the Oracle Business Intelligence Discoverer EUL.

Table 4: List of date folders in the Oracle Business Intelligence Discoverer EUL

Date Folder	Date Folder
Award Status Date	Origination Tag Number Date
Birth Date	Package Completion Date
Collection Date	Pledge Date
Current Time Status Date	Pool Termination Date
Date Added Date	Position Begin Date

Table 4: List of date folders in the Oracle Business Intelligence Discoverer EUL

Date Folder	Date Folder
Deceased Date	Position Vacancy Date
Document Date	Posting Date
Enrollment Status Date	Profile Date
Function Start Date	Project Start Date
Highest Gift Amount Date	Purchase Order Date
Immigration Status Date	Rating Date
Income Spend End Date	Related Birth Date
Invoice Date	Related Deceased Date
Latest Decision Date	Start Date
Military Separation Date	Target Ask Date
Most Recent Gift Date	Tenure Date
Most Recent Pledge Date	Transaction Date
Operating Date	Visa Start Date

The EUL joins a date in a folder created for a typical reporting view to the date item in the date folder. The date is then accessible along with date items for Year, Month, and Day from the date folder. Drill up or down on these items to view more detail or a more generalized view of the information. The date folders are sometimes used in more than one business area.

The table below displays the date folders in the Oracle Business Intelligence Discoverer EUL by business area:

Table 5: List of date folders in the Oracle Business Intelligence Discoverer EUL by Business area

Business Area	Date Folder
Active Registration	Current Time Status Date
	Enrollment Status Date
Admissions Application	Latest Decision Date
Advancement Prospect	Target Ask Date
Advancement Rating	Rating Date
Annual Giving	Highest Gift Amount Date
Constituent	Most Recent Gift Date

Table 5: List of date folders in the Oracle Business Intelligence Discoverer EUL by Business area

Business Area	Date Folder
	Most Recent Pledge Date
Constituent Entity	Birth Date
Employee	Profile Date
Endowment Distribution	Income Spend End Date
Endowment Unit	Pool Termination Date
Enrollment Management	Current Time Status Date
	Enrollment Status Date
Event	Function Start Date
Faculty Assignment	Tenure Date
Financial Aid Application	Package Completion Date
Financial Aid Award and Disbursement	Award Status Date
Fixed Asset	Origination Tag Number Date
Gift	Deceased Date
	Posting Date
Government Reporting	Visa Start Date
Grant and Project	Project Start Date
Human Resource Application	Position Vacancy Date
Human Resource Faculty	Tenure Date
Invoice Payable	Invoice Date
Organizational Constituent	Most Recent Gift Date
	Most Recent Pledge Date
Payroll	Document Date
Person Demographic	Birth Date
	Deceased Date
	Immigration Status Date
	Military Separation Date
Person Role	Birth Date
	Deceased Date
	Immigration Status Date

Table 5: List of date folders in the Oracle Business Intelligence Discoverer EUL by Business area

Business Area	Date Folder
	Military Separation Date
Person Supplemental	Birth Date
	Deceased Date
	Immigration Status Date
	Military Separation Date
Pledge	Deceased Date
	Pledge Date
	Posting Date
Position	Position Begin Date
Purchasing Payable	Invoice Date
	Purchase Order Date
Receivable Customer	Collection Date
Receivable Revenue	Operating Date
Recruitment Information	Date Added Date
Relationship	Related Birth Date
	Related Deceased Date
Residential Life	Birth Date
	Deceased Date
	Immigration Status Date
	Military Separation Date
	Start Date
Schedule Offering	Start Date
Transaction History	Transaction Date

Data Models

A typical data model indicates what information is in a database, how the information can be used, and how the items in the database relate to each other.

Because of the size and scope of the Banner ODS data model, reporting views are grouped into logical “Business Concepts” to better illustrate the various business uses or reporting opportunities within the Banner ODS. These data models depict the reporting views contained in each business concept and how the reporting views, and the data within these reporting views, is related to each other.

The Banner Operational Data Store (Banner ODS) is comprised of over 300 reporting views containing data across eight subject areas applicable to higher education. The Data models in this chapter are grouped into the following sections based on business areas:

- Accounts Receivable
- Advancement
- Common
- Finance
- Financial Aid
- Human Resources
- Student
- Travel and Expense

The data models (Entity Relationship Diagrams or ERDs) in this chapter incorporate most of the reporting views available in the Banner ODS, and illustrate business concepts within and across all Banner ODS subject areas. However, this is not an inclusive representation as additional business concepts could be conceived and supported by the Banner ODS. There may also be alternative associations between the reporting views within any given data model depending on the type of report you are running.

Entity Relationship Diagrams (ERD)

The most widely used method for representing a data model is the Entity Relationship Diagram (ERD). This chapter uses ERDs to represent the logical relationships between the reporting views within a given Banner ODS business concept. Each ERD represents a business concept. The entities within each ERD correspond to the reporting views associated with that business concept. They do not include all the columns in the reporting views. They only display the primary key columns.

The following legend explains the relationships used in the business concept ERDs.

ERD Relationship Legend

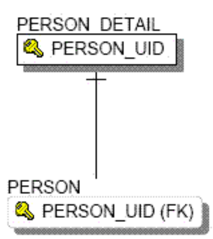
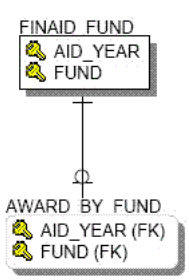
The legend contains three categories:

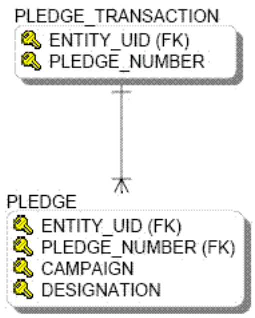
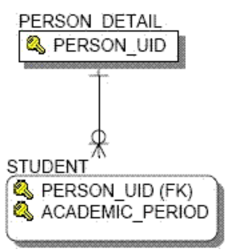
- Identifying Relationships
- Optional Non-Identifying Relationships
- Special Relationships

Identifying Relationships

Most relationships in the business concept ERDs are identifying relationships. Identifying Relationships are represented by a solid line. An Identifying Relationship is a relationship between two entities in which an instance of a child entity is identified through its association with a parent entity, which means the child entity is dependent on the parent entity for its identity and cannot exist without it.

The primary key attributes migrate from a parent entity to a child entity, so the primary key of the child has attributes from the parent entity primary key in it. These are called foreign keys, and they are marked with the characters (FK) beside them.

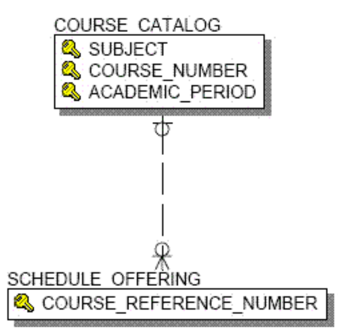
Identifying Relationship	Description
One to Exactly One 	Each Person Detail has exactly one Person.
One to Zero or One 	Each Finaid Fund has zero or one Award by Fund.

Identifying Relationship	Description
One to One or More  	Each Pledge Transaction has one or more Pledges.
One to Zero, One or More  	Each Person has zero, one, or more Students. This makes sense because a Student really represents a student for each academic period.

Optional Non-Identifying Relationship

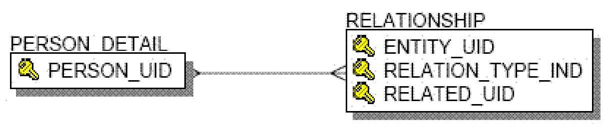
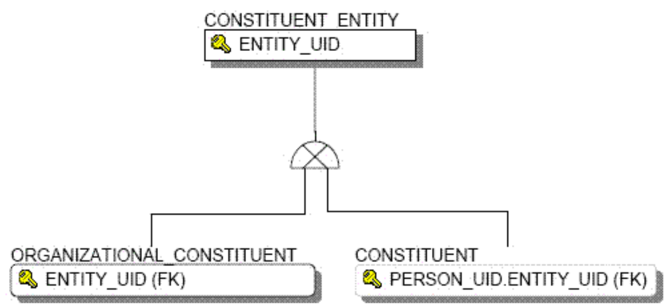
Non-identifying relationships are represented by a dashed line. A Non-Identifying Relationship is a relationship between two entities in which an instance of the child entity is not identified through its association with a parent entity. This means the child entity is not dependent on the parent entity for its identity and can exist without it.

In an optional non-identifying relationship, the attributes that are migrated into the non-key area of the child entity are not required in the child entity. Therefore, nulls are allowed in the foreign key.

Zero or One to Zero, One, or More  	Each Course Catalog entry has zero, one or more Schedule Offerings. There may be a Schedule Offering without a Course Catalog entry.

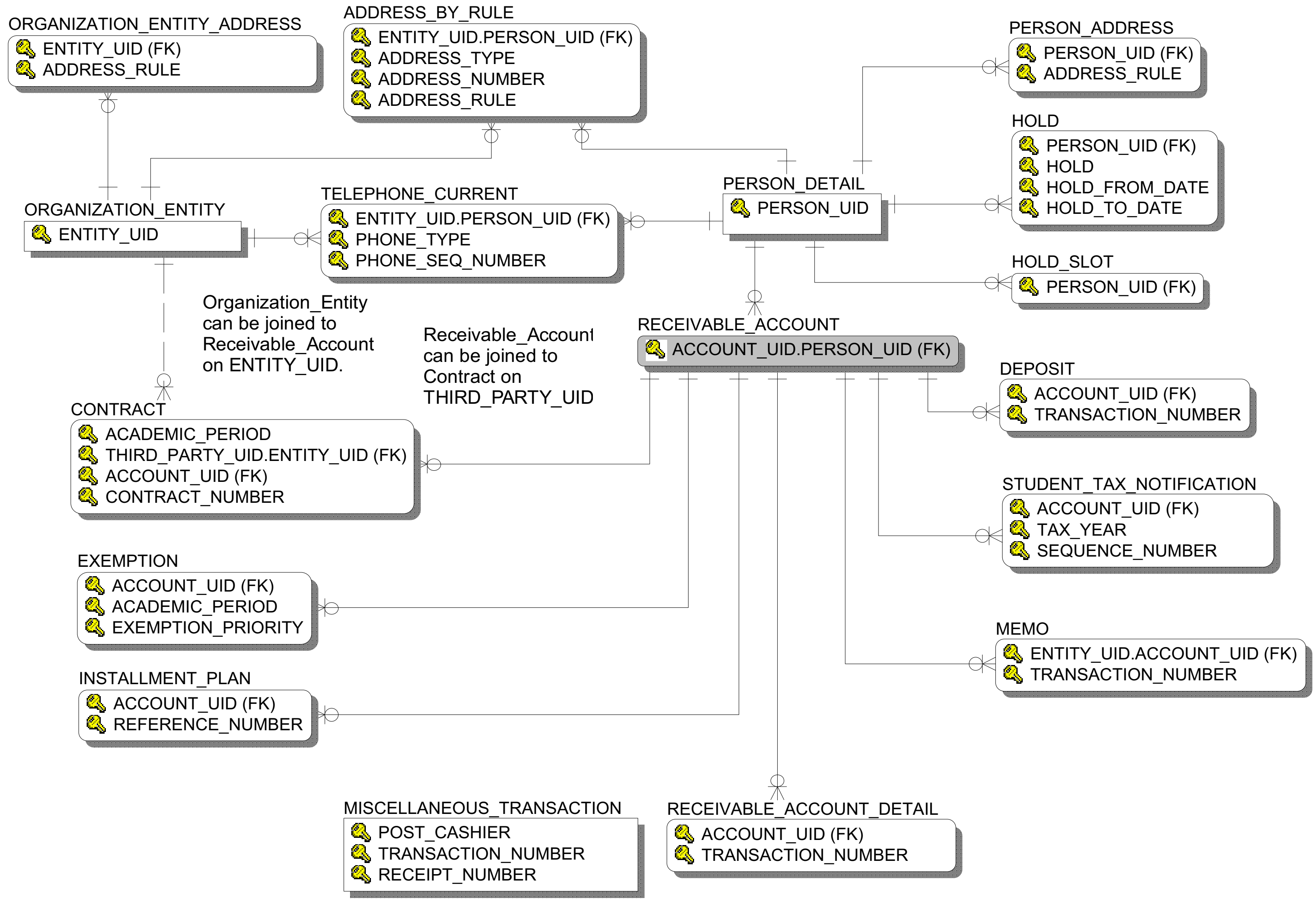
Special Relationships

Special Relationships are logical relationships that do not use foreign keys.

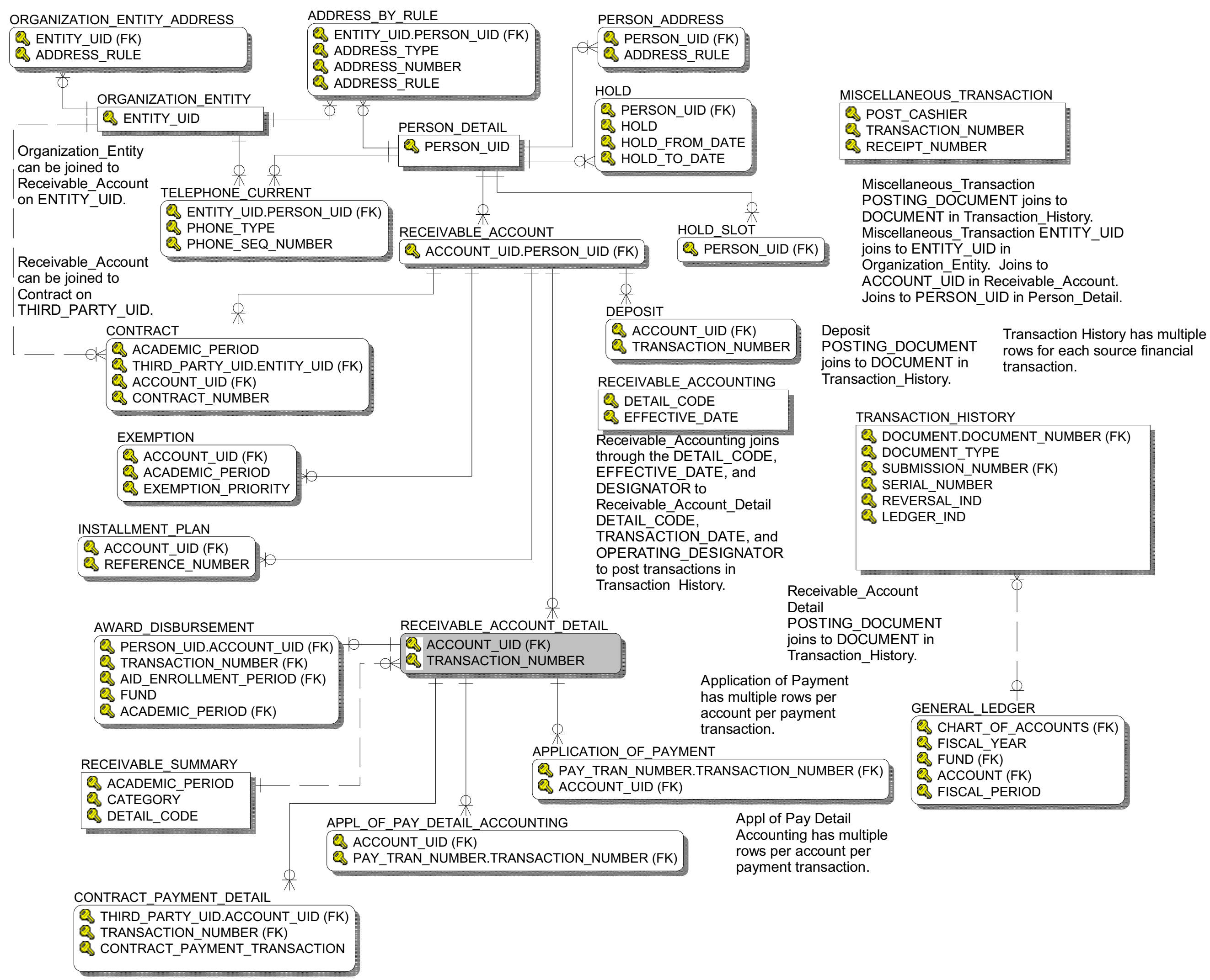
Special Relationship	Description
Many to Many 	A relationship between two entities where instances in one entity have zero, one, or more related instances in the other entity. In the example ERD relationship, each Person can have many Relationships, and each Relationship can be related to many (actually two) Persons.
Subtype Relationships 	In an ERD, you can show that organizational constituents and constituents are part of a larger category, Constituent Entity, by creating a subtype relationship. A subtype relationship connects an entity that defines the category and two or more additional entities that define each of the elements of the category. The parent entity of the category is considered the supertype and each child entity is considered a subtype.

Accounts Receivable

Receivable Customer

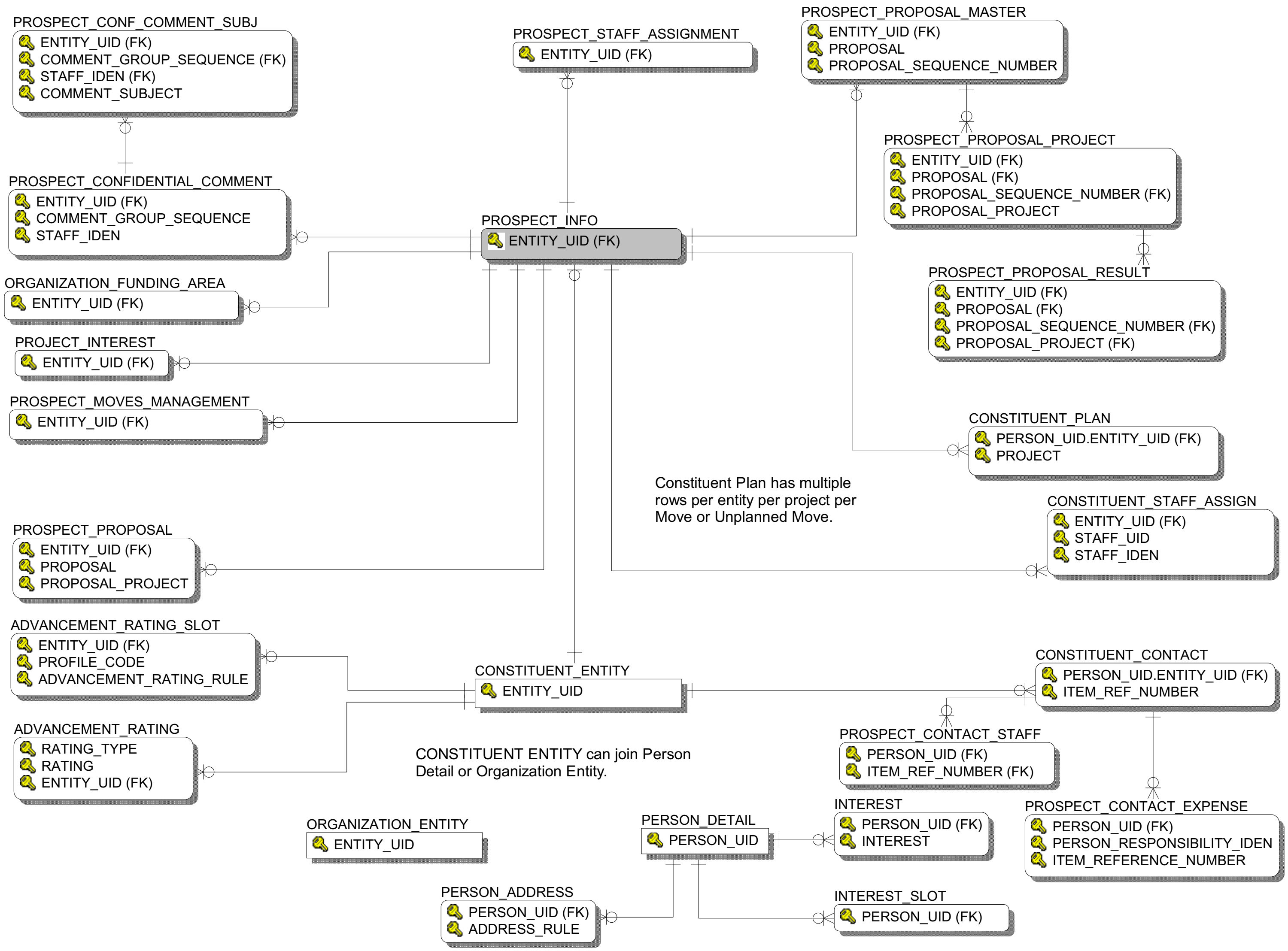


Receivable Revenue


ORGANIZATION_ENTITY_ADDRESS
ENTITY_UID (FK)
ADDRESS_RULE
ADDRESS_BY_RULE
ENTITY_UID.PERSON_UID (FK)
ADDRESS_TYPE
ADDRESS_NUMBER
ADDRESS_RULE
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
ORGANIZATION_ENTITY
ENTITY_UID
HOLD
PERSON_UID (FK)
HOLD
HOLD_FROM_DATE
HOLD_TO_DATE
MISCELLANEOUS_TRANSACTION
POST_CASHIER
TRANSACTION_NUMBER
RECEIPT_NUMBER
PERSON_DETAIL
PERSON_UID
Organization_Entity can be joined to Receivable_Account on ENTITY_UID.
TELEPHONE_CURRENT
ENTITY_UID.PERSON_UID (FK)
PHONE_TYPE
PHONE_SEQ_NUMBER
RECEIVABLE_ACCOUNT
ACCOUNT_UID.PERSON_UID (FK)
HOLD_SLOT
PERSON_UID (FK)
Miscellaneous_Transaction POSTING_DOCUMENT joins to DOCUMENT in Transaction_History. Miscellaneous_Transaction ENTITY_UID joins to ENTITY_UID in Organization_Entity. Joins to ACCOUNT_UID in Receivable_Account. Joins to PERSON_UID in Person_Detail.
Receivable_Account can be joined to Contract on THIRD_PARTY_UID.
DEPOSIT
ACCOUNT_UID (FK)
TRANSACTION_NUMBER
CONTRACT
ACADEMIC_PERIOD
THIRD_PARTY_UID.ENTITY_UID (FK)
ACCOUNT_UID (FK)
CONTRACT_NUMBER
Deposit POSTING_DOCUMENT joins to DOCUMENT in Transaction_History.
Transaction History has multiple rows for each source financial transaction.
RECEIVABLE_ACCOUNTING
DETAIL_CODE
EFFECTIVE_DATE
Receivable_Accounting joins through the DETAIL_CODE, EFFECTIVE_DATE, and DESIGNATOR to Receivable_Account_Detail DETAIL_CODE, TRANSACTION_DATE, and OPERATING_DESIGNATOR to post transactions in Transaction History.
TRANSACTION_HISTORY
DOCUMENT.DOCUMENT_NUMBER (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND
EXEMPTION
ACCOUNT_UID (FK)
ACADEMIC_PERIOD
EXEMPTION_PRIORITY
INSTALLMENT_PLAN
ACCOUNT_UID (FK)
REFERENCE_NUMBER
Receivable_Account Detail POSTING_DOCUMENT joins to DOCUMENT in Transaction_History.
AWARD_DISBURSEMENT
PERSON_UID.ACCOUNT_UID (FK)
TRANSACTION_NUMBER (FK)
AID_ENROLLMENT_PERIOD (FK)
FUND
ACADEMIC_PERIOD (FK)
RECEIVABLE_ACCOUNT_DETAIL
ACCOUNT_UID (FK)
TRANSACTION_NUMBER
Application of Payment has multiple rows per account per payment transaction.
GENERAL_LEDGER
CHART_OF_ACCOUNTS (FK)
FISCAL_YEAR
FUND (FK)
ACCOUNT (FK)
FISCAL_PERIOD
APPLICATION_OF_PAYMENT
PAY_TRAN_NUMBER.TRANSACTION_NUMBER (FK)
ACCOUNT_UID (FK)
RECEIVABLE_SUMMARY
ACADEMIC_PERIOD
CATEGORY
DETAIL_CODE
APPL_OF_PAY_DETAIL_ACCOUNTING
ACCOUNT_UID (FK)
PAY_TRAN_NUMBER.TRANSACTION_NUMBER (FK)
Appl of Pay Detail Accounting has multiple rows per account per payment transaction.
CONTRACT_PAYMENT_DETAIL
THIRD_PARTY_UID.ACCOUNT_UID (FK)
TRANSACTION_NUMBER (FK)
CONTRACT_PAYMENT_TRANSACTION

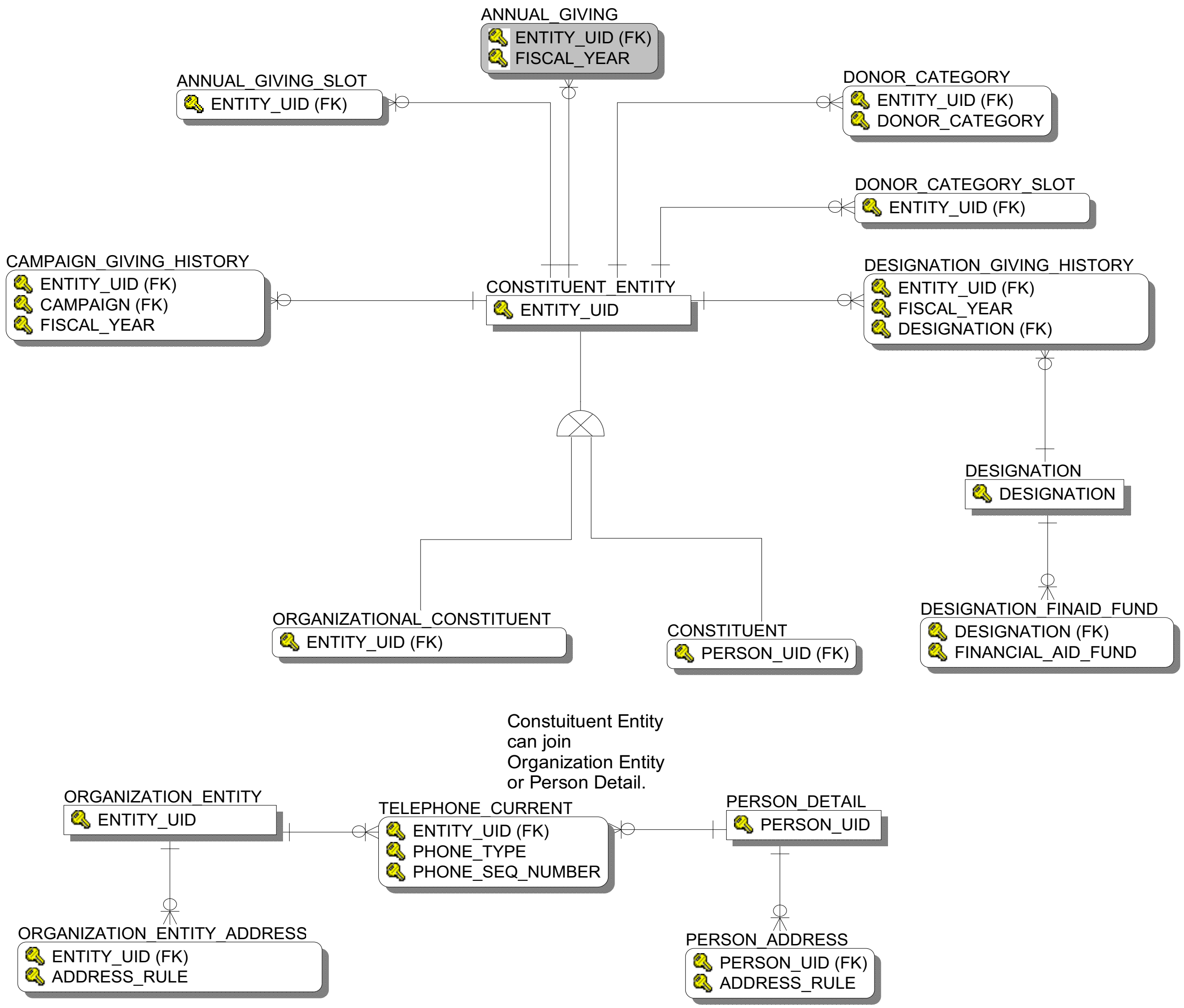
Advancement

Advancement Prospect

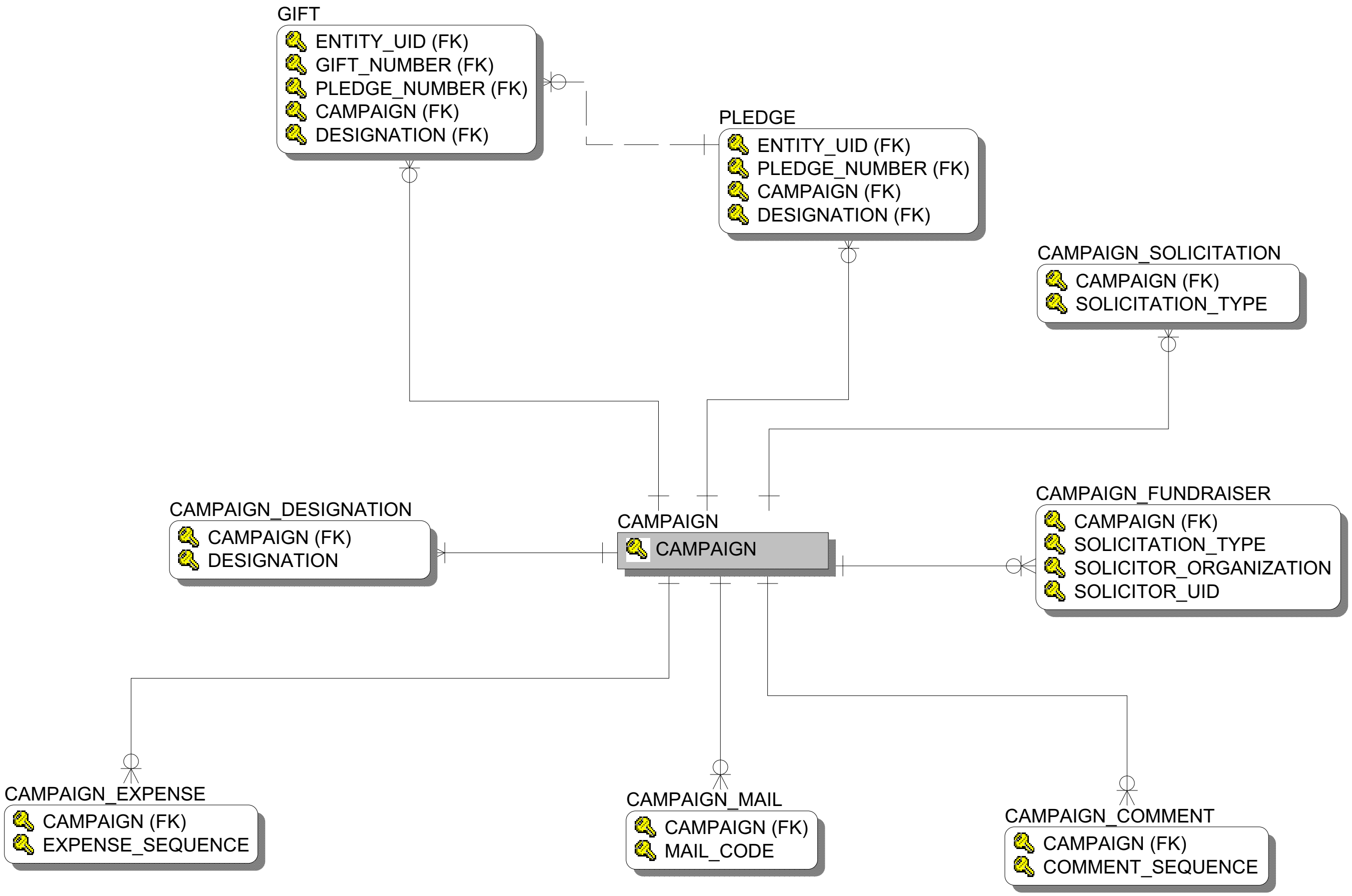

PROSPECT_CONF_COMMENT_SUBJ
ENTITY_UID (FK)
COMMENT_GROUP_SEQUENCE (FK)
STAFF_IDEN (FK)
COMMENT_SUBJECT
PROSPECT_STAFF_ASSIGNMENT
ENTITY_UID (FK)
PROSPECT_PROPOSAL_MASTER
ENTITY_UID (FK)
PROPOSAL
PROPOSAL_SEQUENCE_NUMBER
PROSPECT_PROPOSAL_PROJECT
ENTITY_UID (FK)
PROPOSAL (FK)
PROPOSAL_SEQUENCE_NUMBER (FK)
PROPOSAL_PROJECT
PROSPECT_CONFIDENTIAL_COMMENT
ENTITY_UID (FK)
COMMENT_GROUP_SEQUENCE
STAFF_IDEN
PROSPECT_INFO
ENTITY_UID (FK)
PROSPECT_PROPOSAL_RESULT
ENTITY_UID (FK)
PROPOSAL (FK)
PROPOSAL_SEQUENCE_NUMBER (FK)
PROPOSAL_PROJECT (FK)
ORGANIZATION_FUNDING_AREA
ENTITY_UID (FK)
PROJECT_INTEREST
ENTITY_UID (FK)
PROSPECT_MOVES_MANAGEMENT
ENTITY_UID (FK)
CONSTITUENT_PLAN
PERSON_UID.ENTITY_UID (FK)
PROJECT
Constituent Plan has multiple rows per entity per project per Move or Unplanned Move.
CONSTITUENT_STAFF_ASSIGN
ENTITY_UID (FK)
STAFF_UID
STAFF_IDEN
PROSPECT_PROPOSAL
ENTITY_UID (FK)
PROPOSAL
PROPOSAL_PROJECT
ADVANCEMENT_RATING_SLOT
ENTITY_UID (FK)
PROFILE_CODE
ADVANCEMENT_RATING_RULE
CONSTITUENT_ENTITY
ENTITY_UID
CONSTITUENT_CONTACT
PERSON_UID.ENTITY_UID (FK)
ITEM_REF_NUMBER
ADVANCEMENT_RATING
RATING_TYPE
RATING
ENTITY_UID (FK)
CONSTITUENT ENTITY can join Person Detail or Organization Entity.
PROSPECT_CONTACT_STAFF
PERSON_UID (FK)
ITEM_REF_NUMBER (FK)
PROSPECT_CONTACT_EXPENSE
PERSON_UID (FK)
PERSON_RESPONSIBILITY_IDEN
ITEM_REFERENCE_NUMBER
ORGANIZATION_ENTITY
ENTITY_UID
PERSON_DETAIL
PERSON_UID
INTEREST
PERSON_UID (FK)
INTEREST
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
INTEREST_SLOT
PERSON_UID (FK)

Advancement Rating

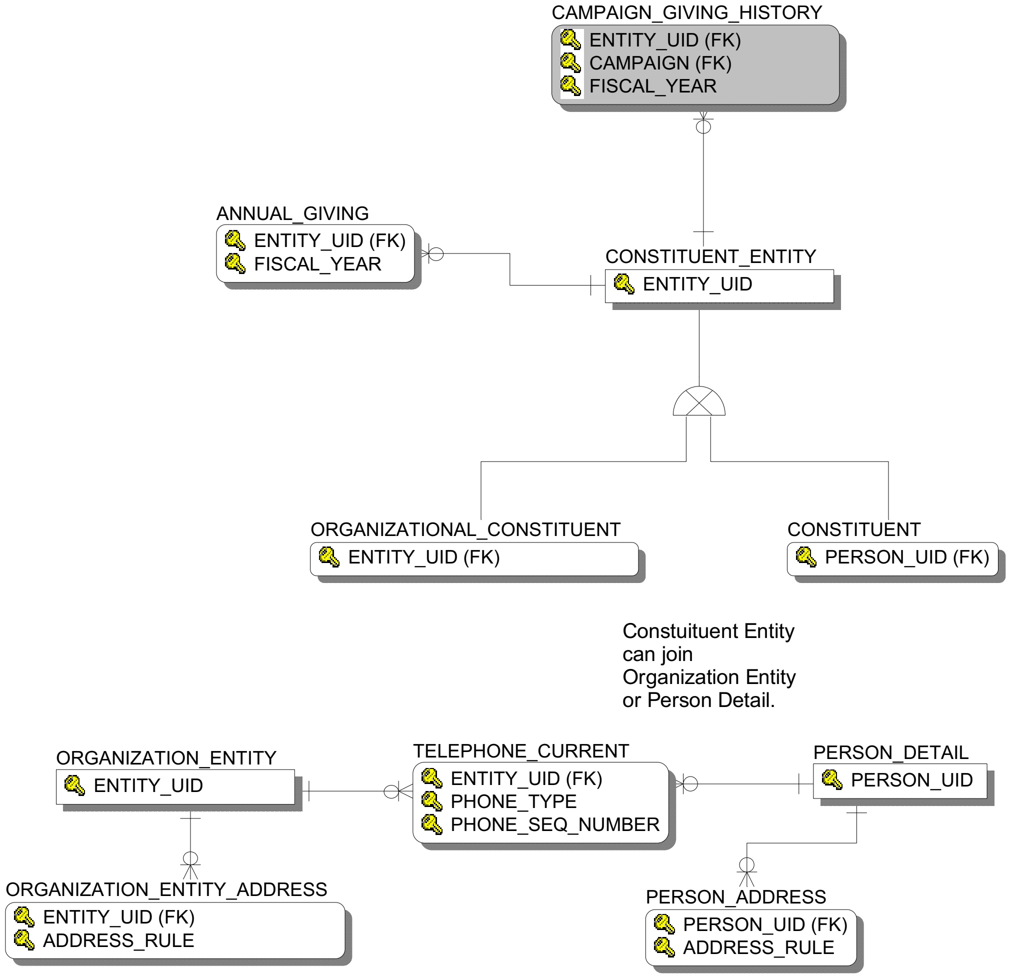
Annual Giving



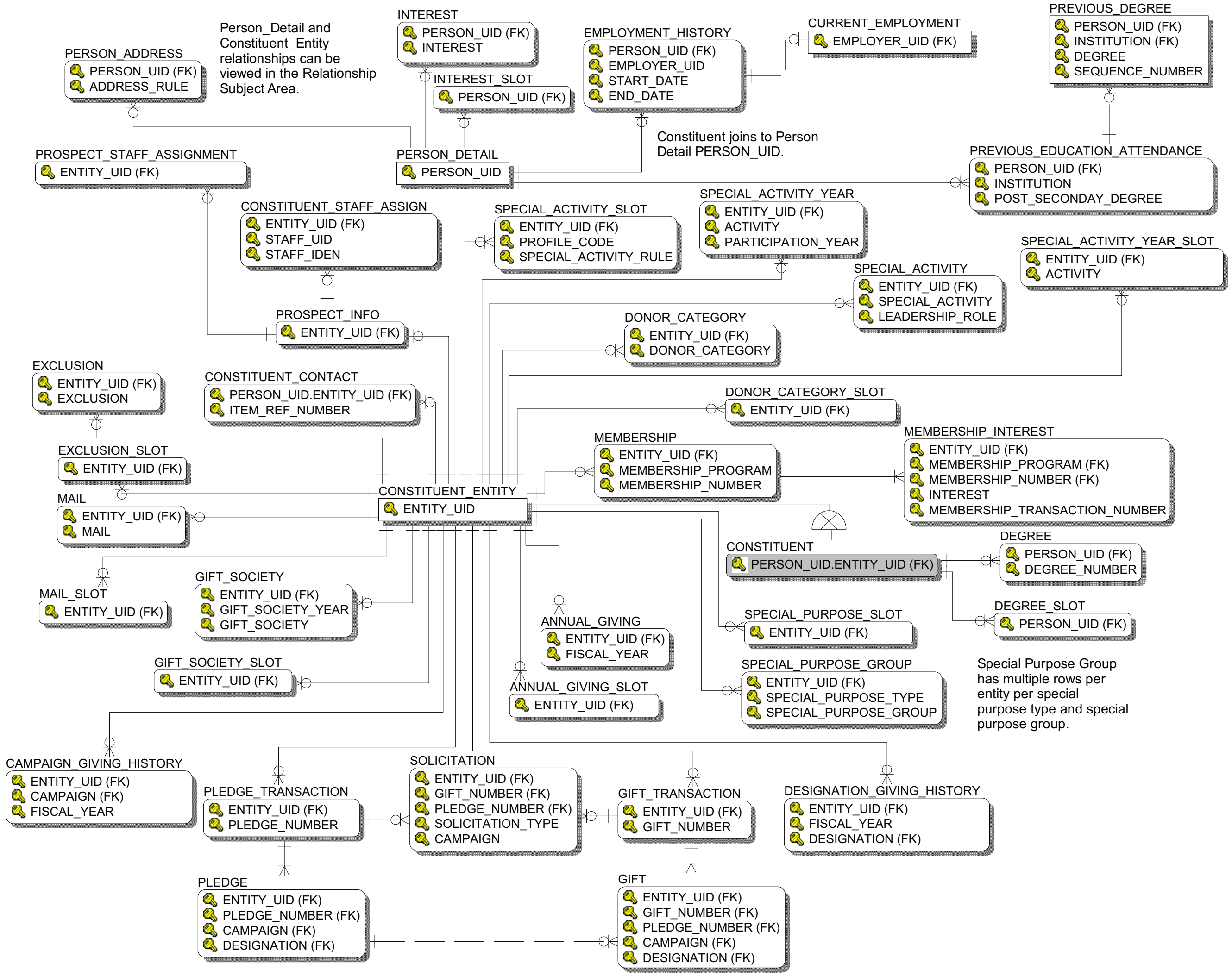
Campaign Management



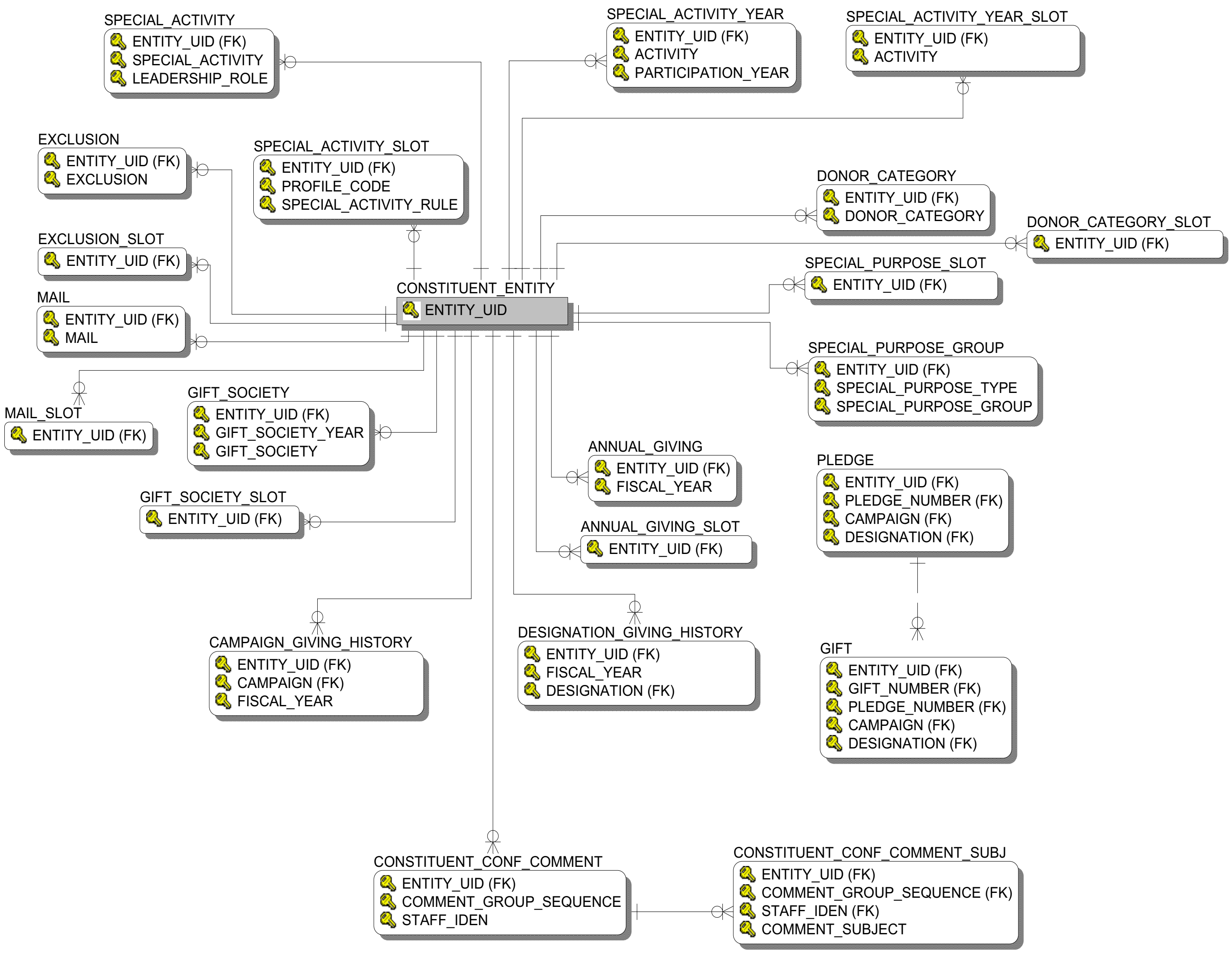
Campaign Giving History



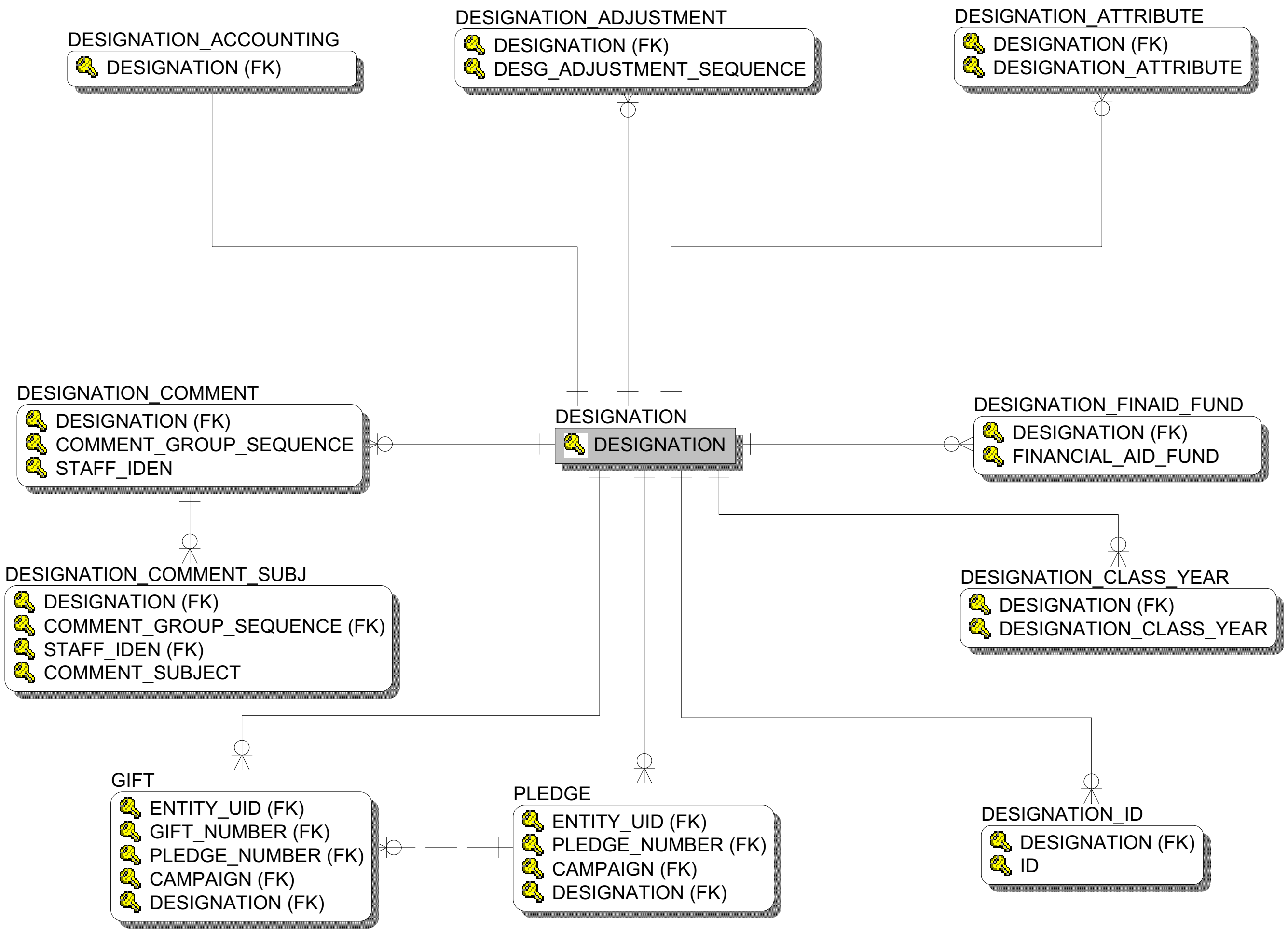
Constituent



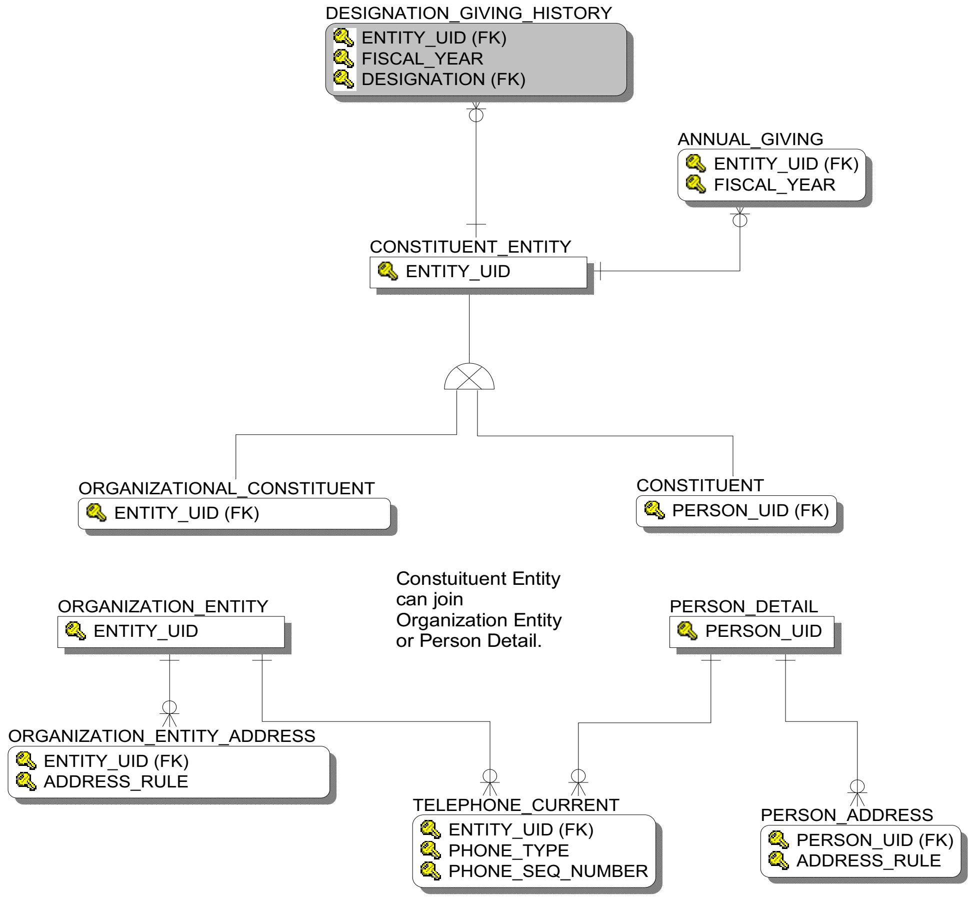
Constituent Entity


SPECIAL_ACTIVITY
ENTITY_UID (FK)
SPECIAL_ACTIVITY
LEADERSHIP_ROLE
SPECIAL_ACTIVITY_YEAR
ENTITY_UID (FK)
ACTIVITY
PARTICIPATION_YEAR
SPECIAL_ACTIVITY_YEAR_SLOT
ENTITY_UID (FK)
ACTIVITY
EXCLUSION
ENTITY_UID (FK)
EXCLUSION
SPECIAL_ACTIVITY_SLOT
ENTITY_UID (FK)
PROFILE_CODE
SPECIAL_ACTIVITY_RULE
DONOR_CATEGORY
ENTITY_UID (FK)
DONOR_CATEGORY
DONOR_CATEGORY_SLOT
ENTITY_UID (FK)
EXCLUSION_SLOT
ENTITY_UID (FK)
SPECIAL_PURPOSE_SLOT
ENTITY_UID (FK)
CONSTITUENT_ENTITY
ENTITY_UID
MAIL
ENTITY_UID (FK)
MAIL
SPECIAL_PURPOSE_GROUP
ENTITY_UID (FK)
SPECIAL_PURPOSE_TYPE
SPECIAL_PURPOSE_GROUP
GIFT_SOCIETY
ENTITY_UID (FK)
GIFT_SOCIETY_YEAR
GIFT_SOCIETY
MAIL_SLOT
ENTITY_UID (FK)
ANNUAL_GIVING
ENTITY_UID (FK)
FISCAL_YEAR
PLEDGE
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
GIFT_SOCIETY_SLOT
ENTITY_UID (FK)
ANNUAL_GIVING_SLOT
ENTITY_UID (FK)
DESIGNATION_GIVING_HISTORY
ENTITY_UID (FK)
FISCAL_YEAR
DESIGNATION (FK)
CAMPAIGN_GIVING_HISTORY
ENTITY_UID (FK)
CAMPAIGN (FK)
FISCAL_YEAR
GIFT
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
CONSTITUENT_CONF_COMMENT
ENTITY_UID (FK)
COMMENT_GROUP_SEQUENCE
STAFF_IDEN
CONSTITUENT_CONF_COMMENT_SUBJ
ENTITY_UID (FK)
COMMENT_GROUP_SEQUENCE (FK)
STAFF_IDEN (FK)
COMMENT_SUBJECT

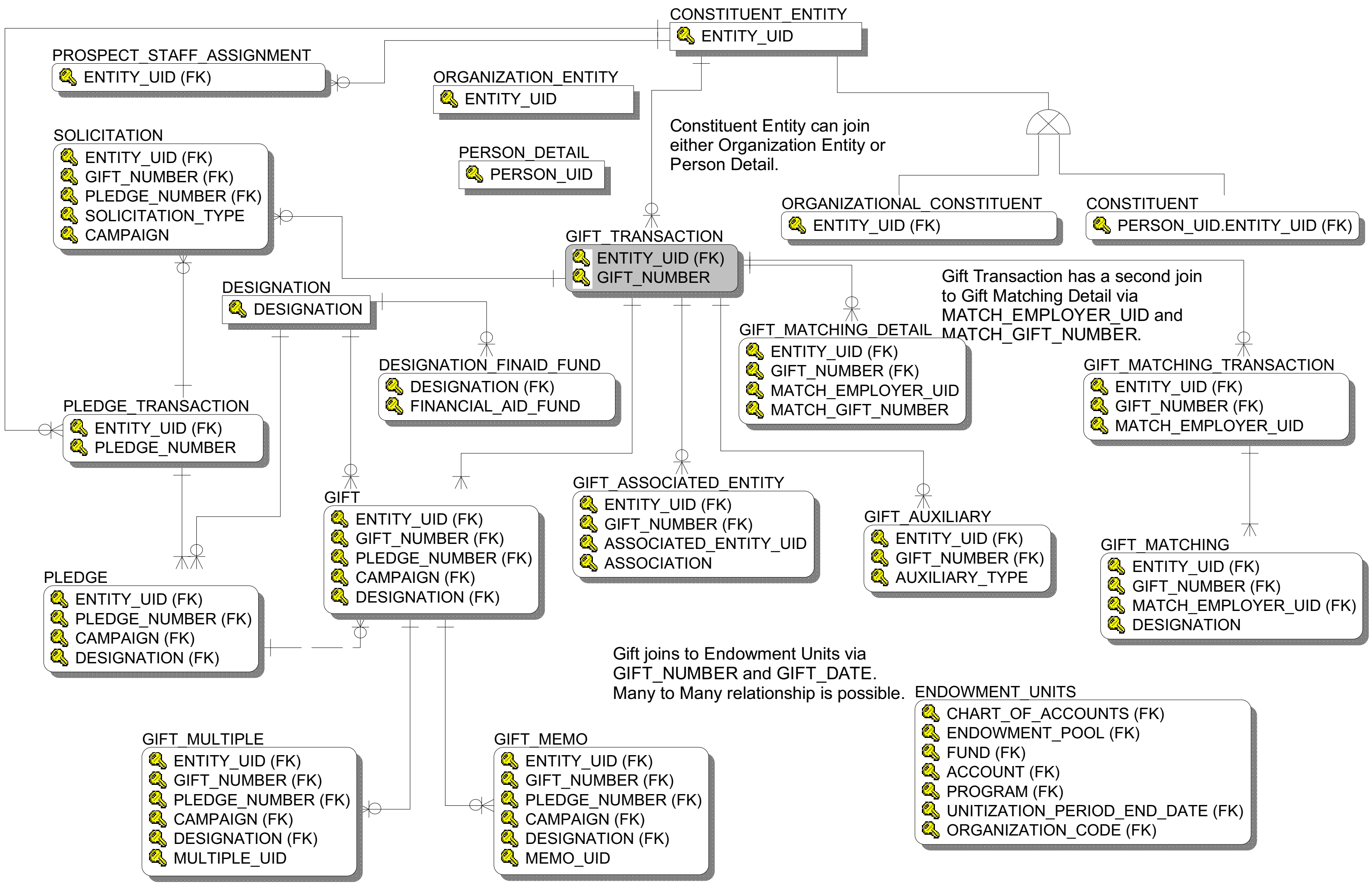
Designation



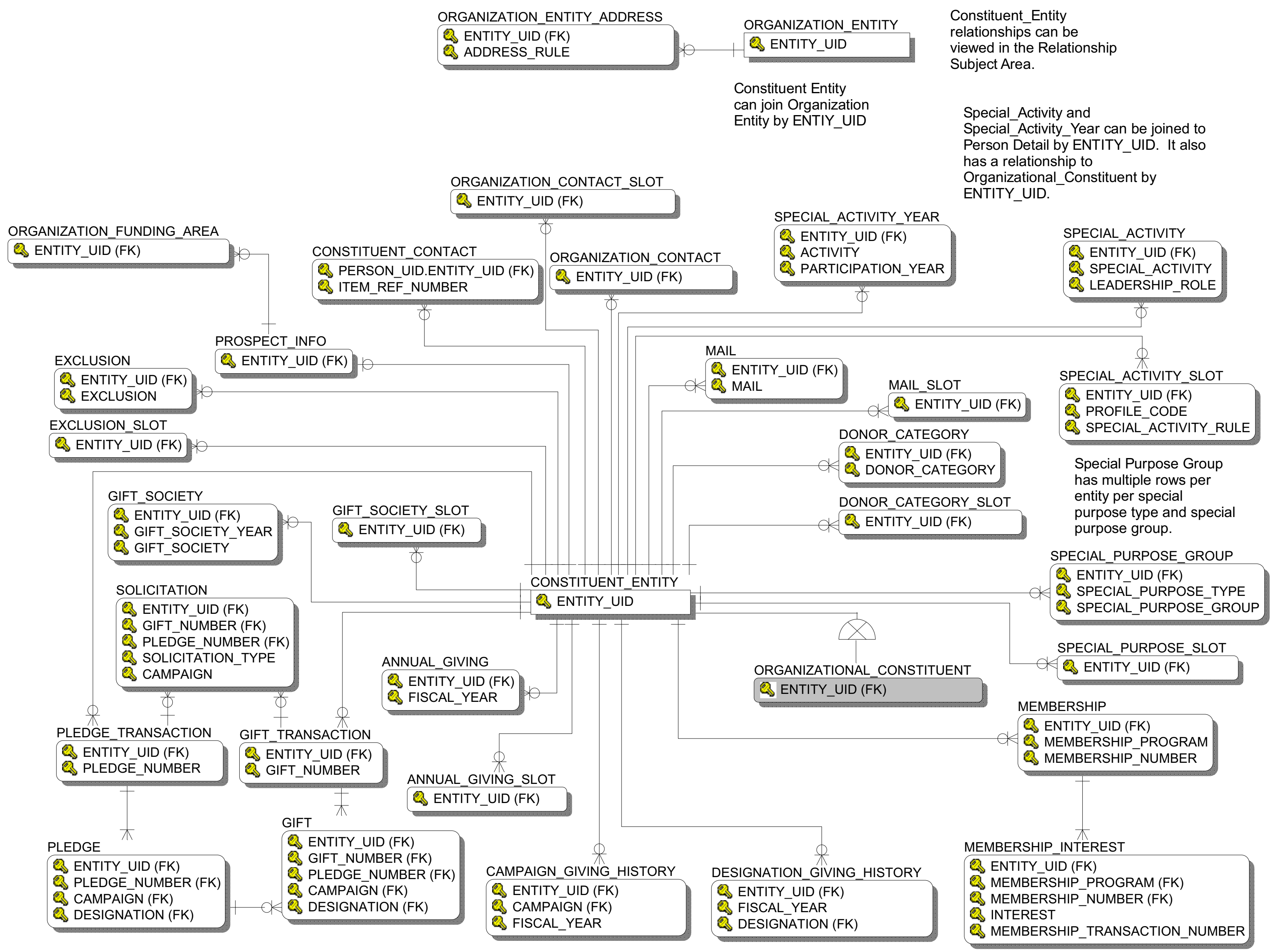
Designation Giving History



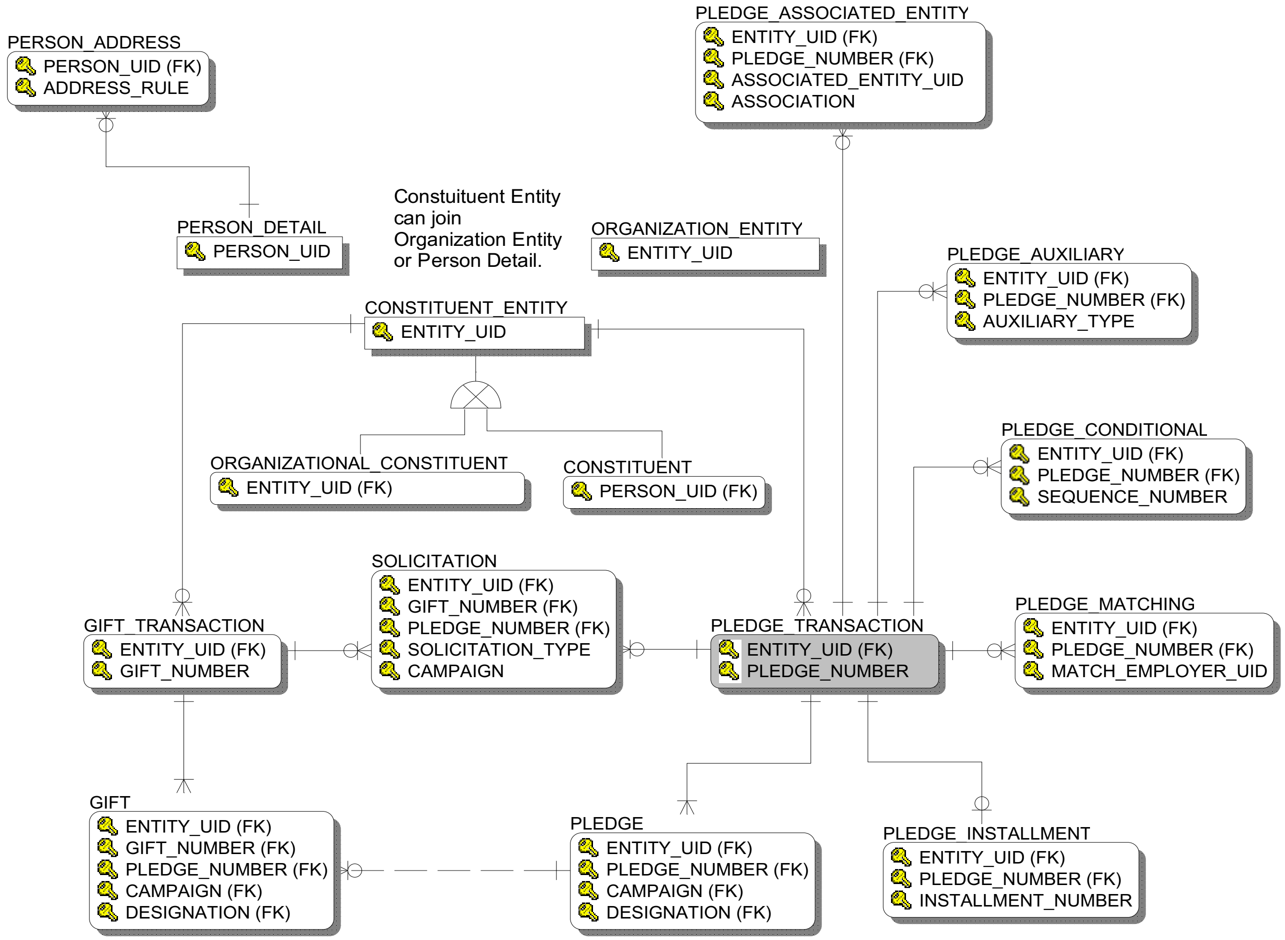
Gift


CONSTITUENT_ENTITY
ENTITY_UID
PROSPECT_STAFF_ASSIGNMENT
ENTITY_UID (FK)
ORGANIZATION_ENTITY
ENTITY_UID
Constituent Entity can join either Organization Entity or Person Detail.
SOLICITATION
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
SOLICITATION_TYPE
CAMPAIGN
PERSON_DETAIL
PERSON_UID
ORGANIZATIONAL_CONSTITUENT
ENTITY_UID (FK)
CONSTITUENT
PERSON_UID.ENTITY_UID (FK)
GIFT_TRANSACTION
ENTITY_UID (FK)
GIFT_NUMBER
DESIGNATION
DESIGNATION
Gift Transaction has a second join to Gift Matching Detail via MATCH_EMPLOYER_UID and MATCH_GIFT_NUMBER.
GIFT_MATCHING_DETAIL
ENTITY_UID (FK)
GIFT_NUMBER (FK)
MATCH_EMPLOYER_UID
MATCH_GIFT_NUMBER
DESIGNATION_FINAID_FUND
DESIGNATION (FK)
FINANCIAL_AID_FUND
GIFT_MATCHING_TRANSACTION
ENTITY_UID (FK)
GIFT_NUMBER (FK)
MATCH_EMPLOYER_UID
PLEDGE_TRANSACTION
ENTITY_UID (FK)
PLEDGE_NUMBER
GIFT
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
GIFT_ASSOCIATED_ENTITY
ENTITY_UID (FK)
GIFT_NUMBER (FK)
ASSOCIATED_ENTITY_UID
ASSOCIATION
GIFT_AUXILIARY
ENTITY_UID (FK)
GIFT_NUMBER (FK)
AUXILIARY_TYPE
GIFT_MATCHING
ENTITY_UID (FK)
GIFT_NUMBER (FK)
MATCH_EMPLOYER_UID (FK)
DESIGNATION
PLEDGE
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
Gift joins to Endowment Units via GIFT_NUMBER and GIFT_DATE. Many to Many relationship is possible.
ENDOWMENT_UNITS
CHART_OF_ACCOUNTS (FK)
ENDOWMENT_POOL (FK)
FUND (FK)
ACCOUNT (FK)
PROGRAM (FK)
UNITIZATION_PERIOD_END_DATE (FK)
ORGANIZATION_CODE (FK)
GIFT_MULTIPLE
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
MULTIPLE_UID
GIFT_MEMO
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
MEMO_UID

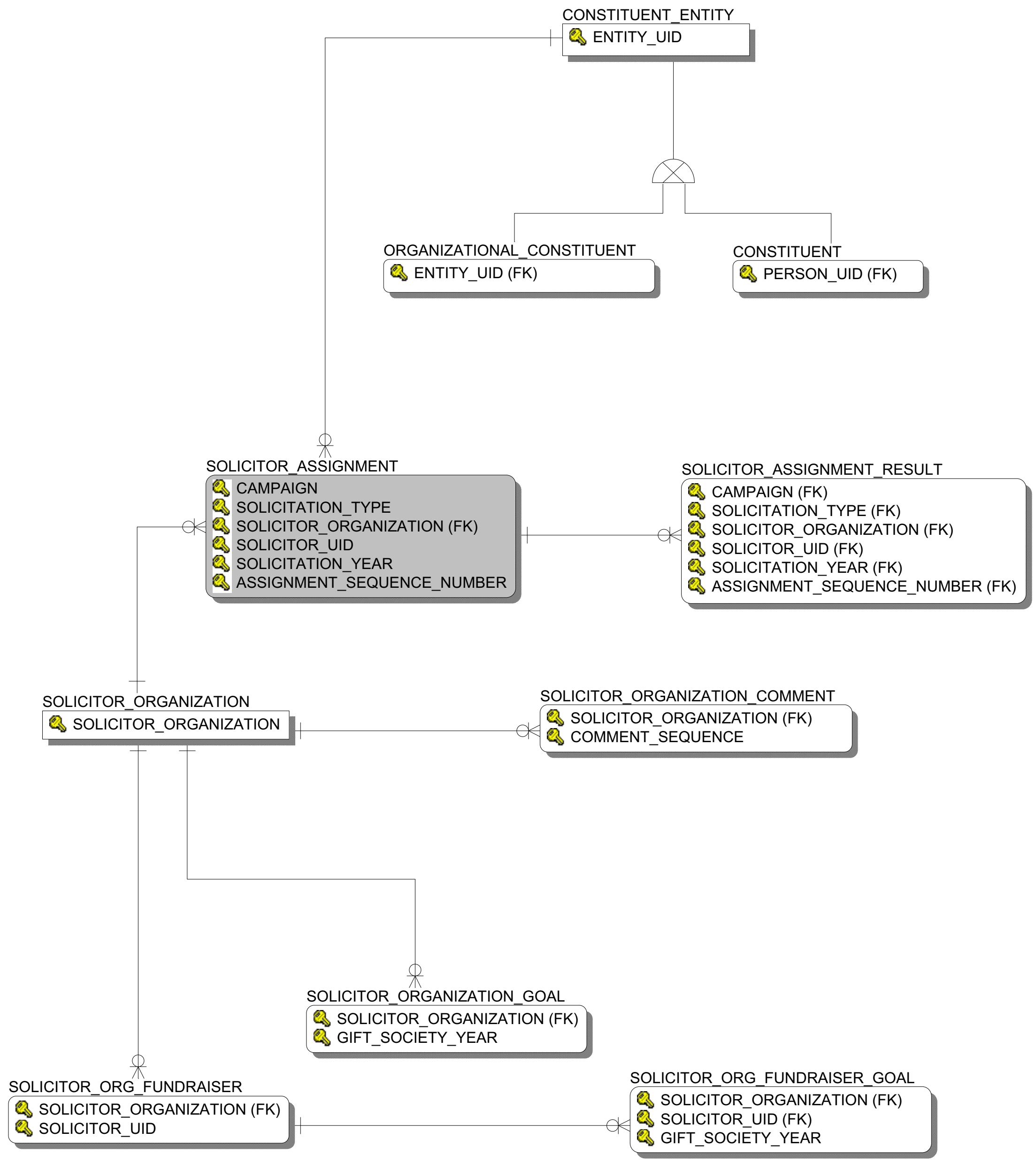
Organizational Constituent


ORGANIZATION_ENTITY_ADDRESS
ENTITY_UID (FK)
ADDRESS_RULE
ORGANIZATION_ENTITY
ENTITY_UID
Constituent_Entity relationships can be viewed in the Relationship Subject Area.
Constituent Entity can join Organization Entity by ENTIY_UID
Special_Activity and Special_Activity_Year can be joined to Person Detail by ENTITY_UID. It also has a relationship to Organizational_Constituent by ENTITY_UID.
ORGANIZATION_CONTACT_SLOT
ENTITY_UID (FK)
ORGANIZATION_FUNDING_AREA
ENTITY_UID (FK)
CONSTITUENT_CONTACT
PERSON_UID.ENTITY_UID (FK)
ITEM_REF_NUMBER
ORGANIZATION_CONTACT
ENTITY_UID (FK)
SPECIAL_ACTIVITY_YEAR
ENTITY_UID (FK)
ACTIVITY
PARTICIPATION_YEAR
SPECIAL_ACTIVITY
ENTITY_UID (FK)
SPECIAL_ACTIVITY
LEADERSHIP_ROLE
PROSPECT_INFO
ENTITY_UID (FK)
EXCLUSION
ENTITY_UID (FK)
EXCLUSION
MAIL
ENTITY_UID (FK)
MAIL
MAIL_SLOT
ENTITY_UID (FK)
SPECIAL_ACTIVITY_SLOT
ENTITY_UID (FK)
PROFILE_CODE
SPECIAL_ACTIVITY_RULE
EXCLUSION_SLOT
ENTITY_UID (FK)
DONOR_CATEGORY
ENTITY_UID (FK)
DONOR_CATEGORY
Special Purpose Group has multiple rows per entity per special purpose type and special purpose group.
GIFT_SOCIETY
ENTITY_UID (FK)
GIFT_SOCIETY_YEAR
GIFT_SOCIETY
GIFT_SOCIETY_SLOT
ENTITY_UID (FK)
DONOR_CATEGORY_SLOT
ENTITY_UID (FK)
SPECIAL_PURPOSE_GROUP
ENTITY_UID (FK)
SPECIAL_PURPOSE_TYPE
SPECIAL_PURPOSE_GROUP
CONSTITUENT_ENTITY
ENTITY_UID
SOLICITATION
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
SOLICITATION_TYPE
CAMPAIGN
ANNUAL_GIVING
ENTITY_UID (FK)
FISCAL_YEAR
SPECIAL_PURPOSE_SLOT
ENTITY_UID (FK)
ORGANIZATIONAL_CONSTITUENT
ENTITY_UID (FK)
MEMBERSHIP
ENTITY_UID (FK)
MEMBERSHIP_PROGRAM
MEMBERSHIP_NUMBER
PLEDGE_TRANSACTION
ENTITY_UID (FK)
PLEDGE_NUMBER
GIFT_TRANSACTION
ENTITY_UID (FK)
GIFT_NUMBER
ANNUAL_GIVING_SLOT
ENTITY_UID (FK)
GIFT
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
PLEDGE
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
CAMPAIGN_GIVING_HISTORY
ENTITY_UID (FK)
CAMPAIGN (FK)
FISCAL_YEAR
DESIGNATION_GIVING_HISTORY
ENTITY_UID (FK)
FISCAL_YEAR
DESIGNATION (FK)
MEMBERSHIP_INTEREST
ENTITY_UID (FK)
MEMBERSHIP_PROGRAM (FK)
MEMBERSHIP_NUMBER (FK)
INTEREST
MEMBERSHIP_TRANSACTION_NUMBER

Pledge

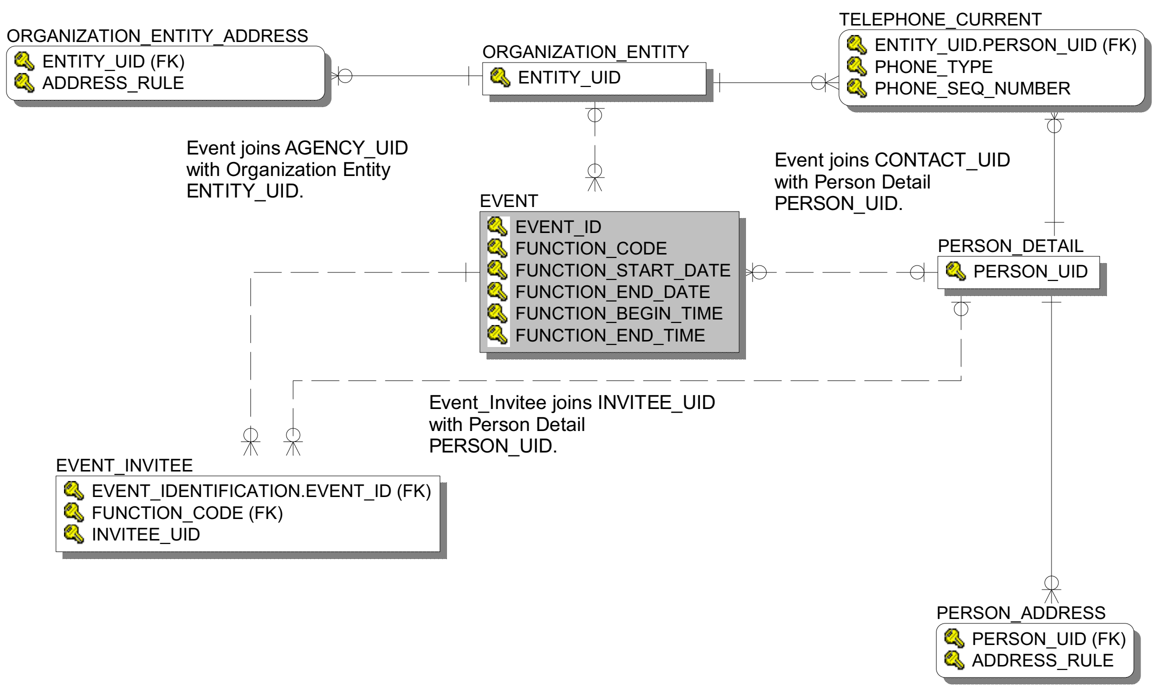

PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
PERSON_DETAIL
PERSON_UID
Constuituent Entity can join Organization Entity or Person Detail.
ORGANIZATION_ENTITY
ENTITY_UID
PLEDGE_ASSOCIATED_ENTITY
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
ASSOCIATED_ENTITY_UID
ASSOCIATION
PLEDGE_AUXILIARY
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
AUXILIARY_TYPE
CONSTITUENT_ENTITY
ENTITY_UID
ORGANIZATIONAL_CONSTITUENT
ENTITY_UID (FK)
CONSTITUENT
PERSON_UID (FK)
PLEDGE_CONDITIONAL
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
SEQUENCE_NUMBER
SOLICITATION
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
SOLICITATION_TYPE
CAMPAIGN
GIFT_TRANSACTION
ENTITY_UID (FK)
GIFT_NUMBER
PLEDGE_TRANSACTION
ENTITY_UID (FK)
PLEDGE_NUMBER
PLEDGE_MATCHING
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
MATCH_EMPLOYER_UID
GIFT
ENTITY_UID (FK)
GIFT_NUMBER (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
PLEDGE
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
CAMPAIGN (FK)
DESIGNATION (FK)
PLEDGE_INSTALLMENT
ENTITY_UID (FK)
PLEDGE_NUMBER (FK)
INSTALLMENT_NUMBER

Solicitation Effort

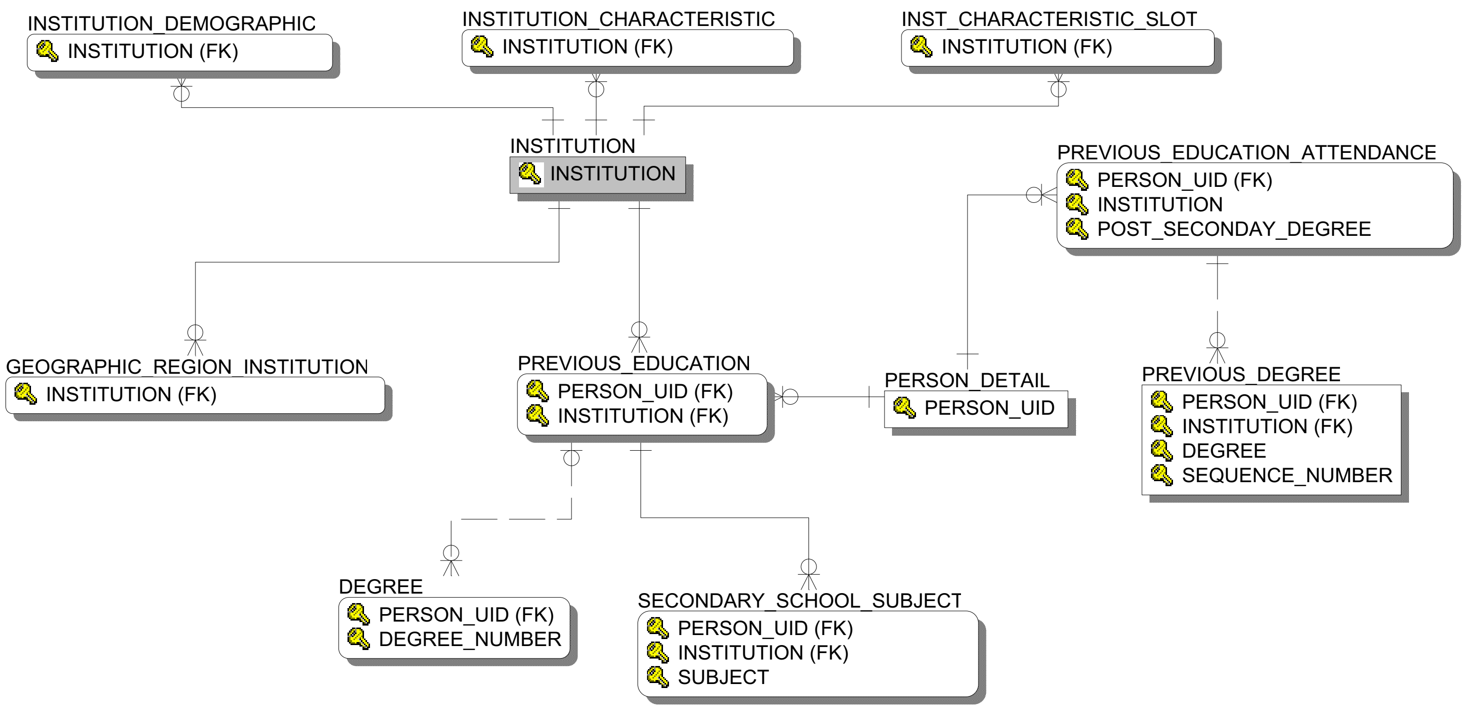

CONSTITUENT_ENTITY
ENTITY_UID
ORGANIZATIONAL_CONSTITUENT
ENTITY_UID (FK)
CONSTITUENT
PERSON_UID (FK)
SOLICITOR_ASSIGNMENT
CAMPAIGN
SOLICITATION_TYPE
SOLICITOR_ORGANIZATION (FK)
SOLICITOR_UID
SOLICITATION_YEAR
ASSIGNMENT_SEQUENCE_NUMBER
SOLICITOR_ASSIGNMENT_RESULT
CAMPAIGN (FK)
SOLICITATION_TYPE (FK)
SOLICITOR_ORGANIZATION (FK)
SOLICITOR_UID (FK)
SOLICITATION_YEAR (FK)
ASSIGNMENT_SEQUENCE_NUMBER (FK)
SOLICITOR_ORGANIZATION
SOLICITOR_ORGANIZATION
SOLICITOR_ORGANIZATION_COMMENT
SOLICITOR_ORGANIZATION (FK)
COMMENT_SEQUENCE
SOLICITOR_ORGANIZATION_GOAL
SOLICITOR_ORGANIZATION (FK)
GIFT_SOCIETY_YEAR
SOLICITOR_ORG_FUNDRAISER
SOLICITOR_ORGANIZATION (FK)
SOLICITOR_UID
SOLICITOR_ORG_FUNDRAISER_GOAL
SOLICITOR_ORGANIZATION (FK)
SOLICITOR_UID (FK)
GIFT_SOCIETY_YEAR

Common

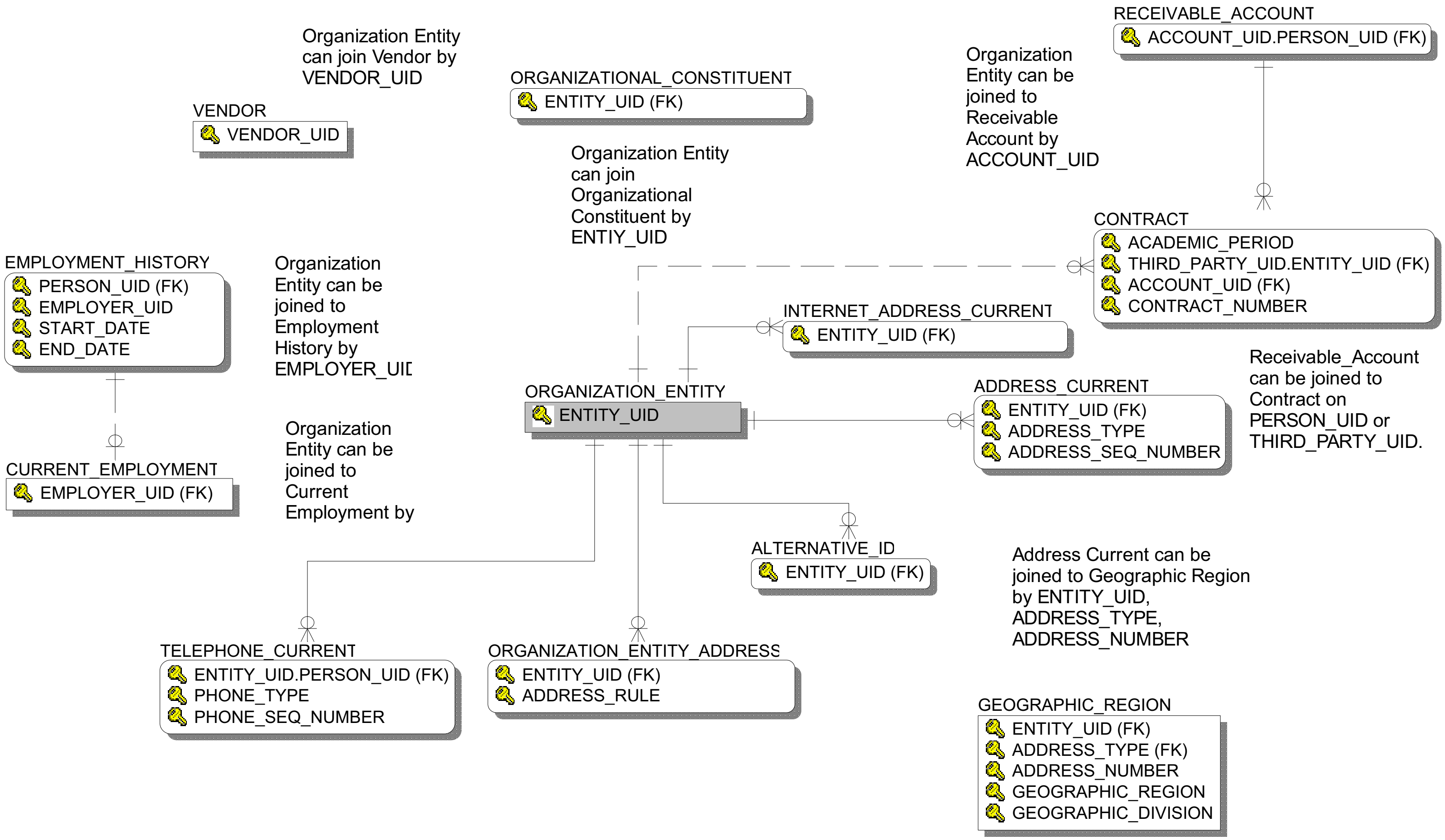
Event



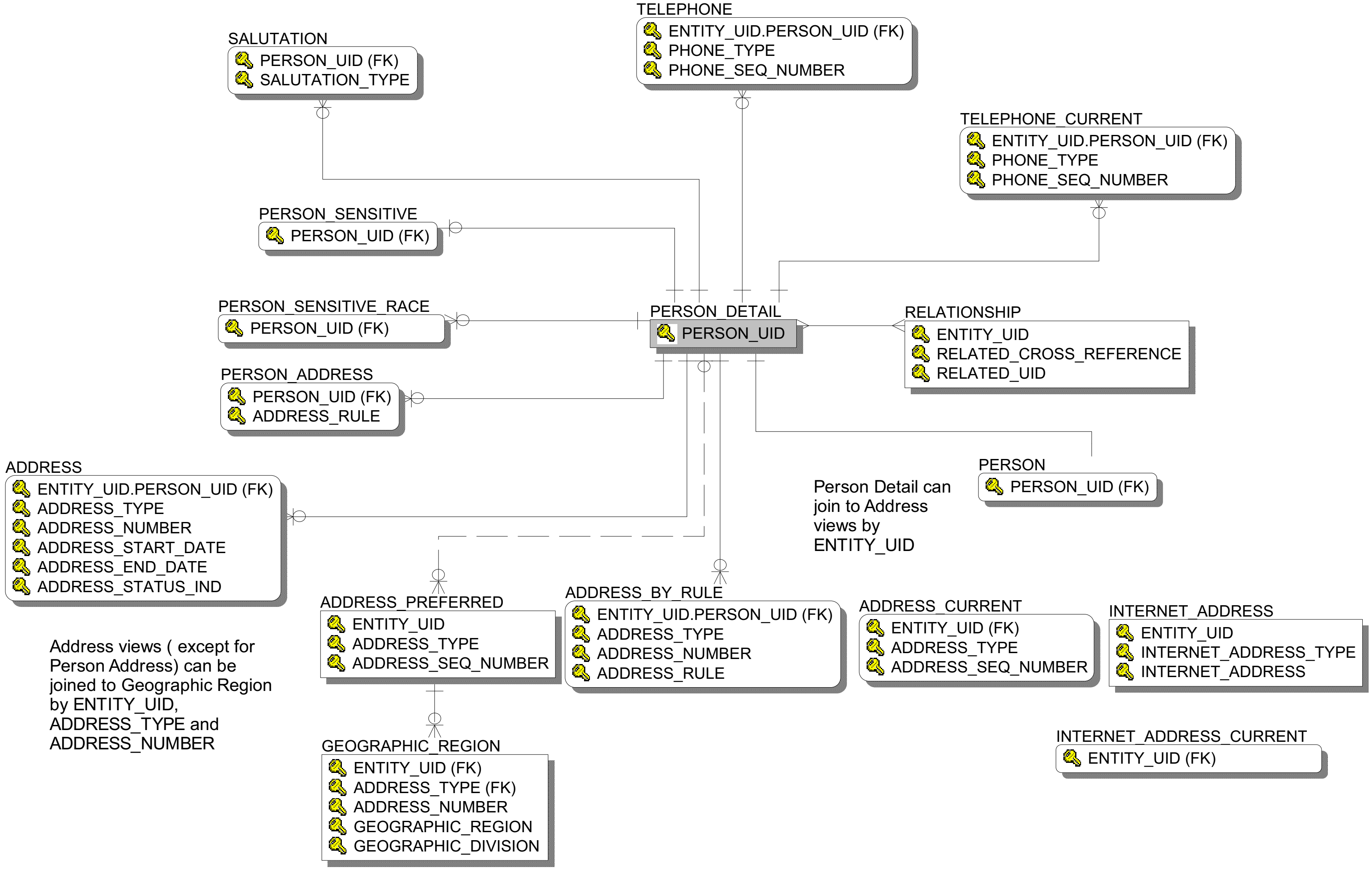
Institution



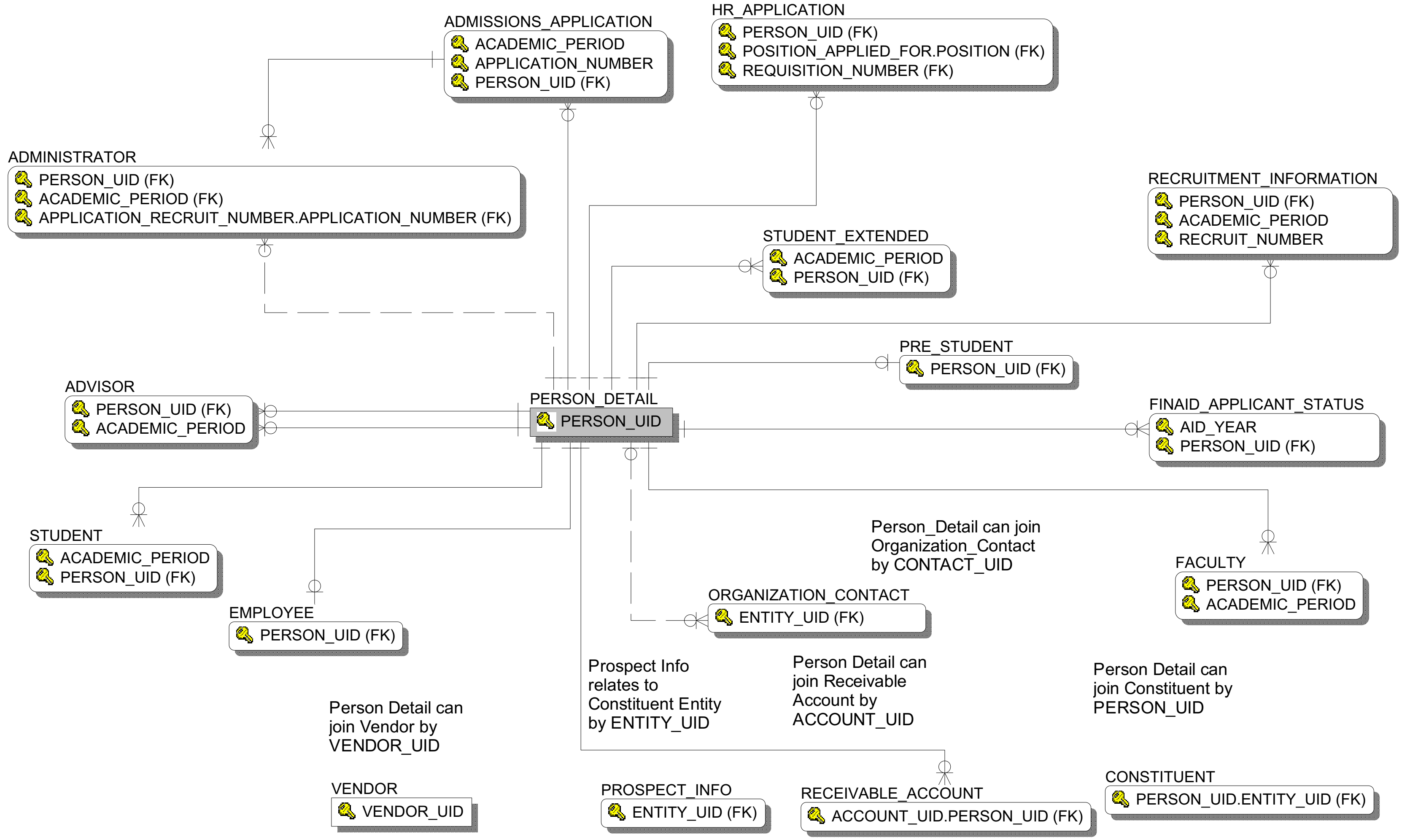
Organization Entity



Person Demographic

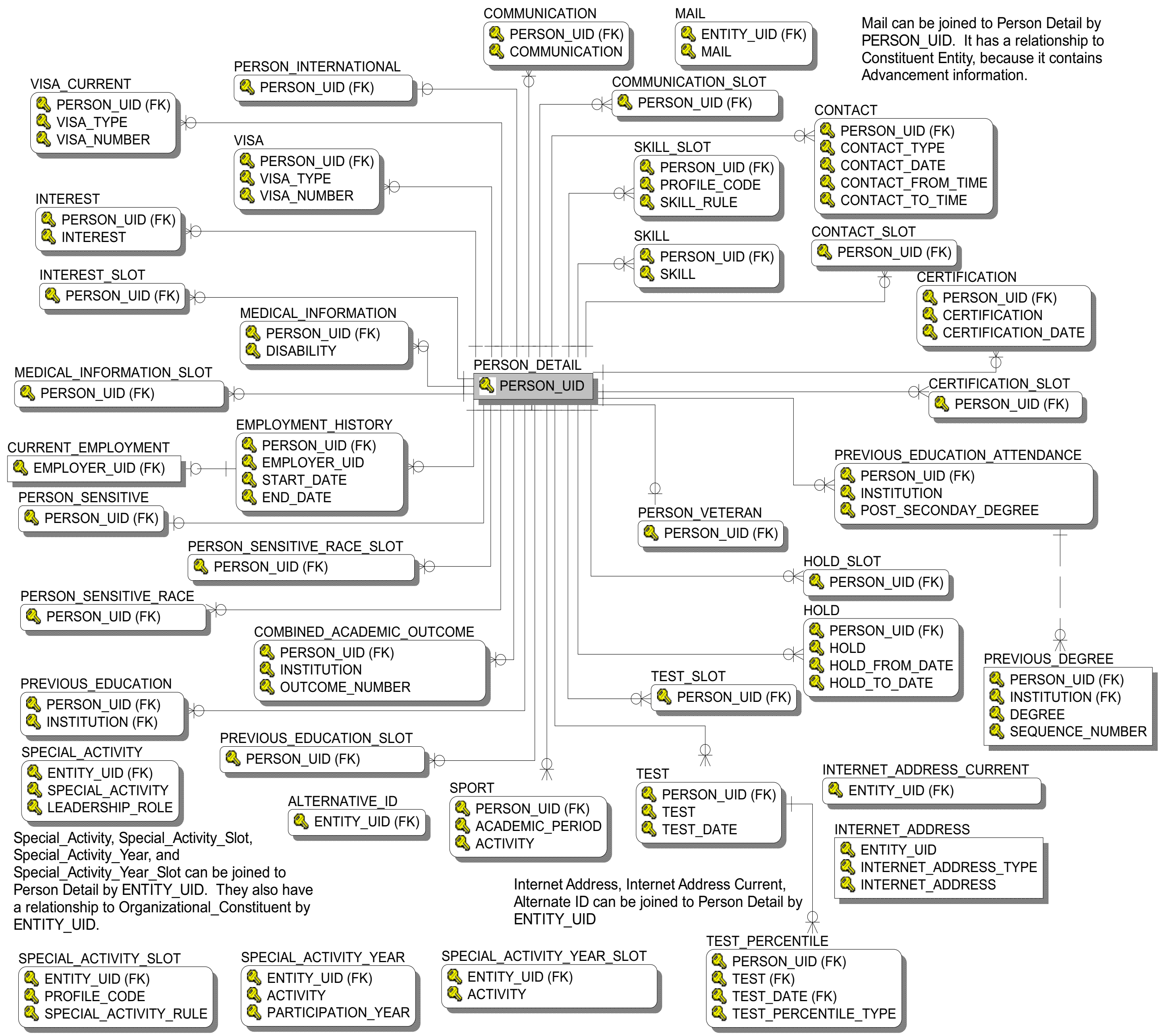


Person Role



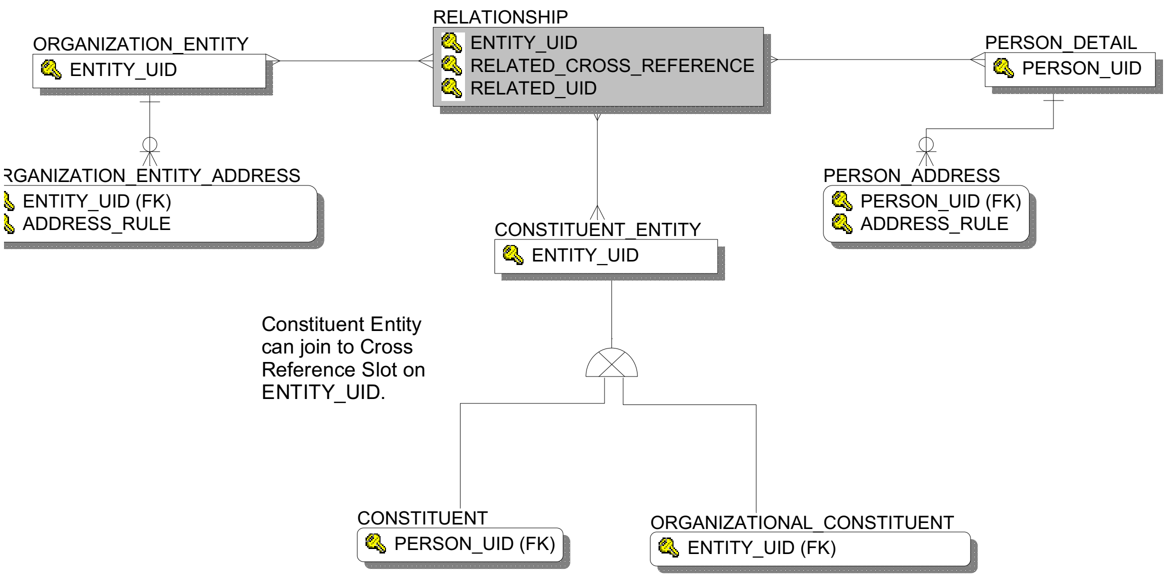
ADMISSIONS_APPLICATION
ACADEMIC_PERIOD
APPLICATION_NUMBER
PERSON_UID (FK)
HR_APPLICATION
PERSON_UID (FK)
POSITION_APPLIED_FOR.POSITION (FK)
REQUISITION_NUMBER (FK)
ADMINISTRATOR
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
APPLICATION_RECRUIT_NUMBER.APPLICATION_NUMBER (FK)
RECRUITMENT_INFORMATION
PERSON_UID (FK)
ACADEMIC_PERIOD
RECRUIT_NUMBER
STUDENT_EXTENDED
ACADEMIC_PERIOD
PERSON_UID (FK)
PRE_STUDENT
PERSON_UID (FK)
ADVISOR
PERSON_UID (FK)
ACADEMIC_PERIOD
PERSON_DETAIL
PERSON_UID
FINAID_APPLICANT_STATUS
AID_YEAR
PERSON_UID (FK)
STUDENT
ACADEMIC_PERIOD
PERSON_UID (FK)
Person_Detail can join Organization_Contact by CONTACT_UID
FACULTY
PERSON_UID (FK)
ACADEMIC_PERIOD
ORGANIZATION_CONTACT
ENTITY_UID (FK)
EMPLOYEE
PERSON_UID (FK)
Prospect Info relates to Constituent Entity by ENTITY_UID
Person Detail can join Receivable Account by ACCOUNT_UID
Person Detail can join Constituent by PERSON_UID
Person Detail can join Vendor by VENDOR_UID
VENDOR
VENDOR_UID
PROSPECT_INFO
ENTITY_UID (FK)
RECEIVABLE_ACCOUNT
ACCOUNT_UID.PERSON_UID (FK)
CONSTITUENT
PERSON_UID.ENTITY_UID (FK)

Person Supplemental


COMMUNICATION
PERSON_UID (FK)
COMMUNICATION
MAIL
ENTITY_UID (FK)
MAIL
Mail can be joined to Person Detail by PERSON_UID. It has a relationship to Constituent Entity, because it contains Advancement information.
PERSON_INTERNATIONAL
PERSON_UID (FK)
COMMUNICATION_SLOT
PERSON_UID (FK)
VISA_CURRENT
PERSON_UID (FK)
VISA_TYPE
VISA_NUMBER
CONTACT
PERSON_UID (FK)
CONTACT_TYPE
CONTACT_DATE
CONTACT_FROM_TIME
CONTACT_TO_TIME
VISA
PERSON_UID (FK)
VISA_TYPE
VISA_NUMBER
SKILL_SLOT
PERSON_UID (FK)
PROFILE_CODE
SKILL_RULE
INTEREST
PERSON_UID (FK)
INTEREST
SKILL
PERSON_UID (FK)
SKILL
CONTACT_SLOT
PERSON_UID (FK)
INTEREST_SLOT
PERSON_UID (FK)
CERTIFICATION
PERSON_UID (FK)
CERTIFICATION
CERTIFICATION_DATE
MEDICAL_INFORMATION
PERSON_UID (FK)
DISABILITY
MEDICAL_INFORMATION_SLOT
PERSON_UID (FK)
PERSON_DETAIL
PERSON_UID
CERTIFICATION_SLOT
PERSON_UID (FK)
EMPLOYMENT_HISTORY
PERSON_UID (FK)
EMPLOYER_UID
START_DATE
END_DATE
CURRENT_EMPLOYMENT
EMPLOYER_UID (FK)
PREVIOUS_EDUCATION_ATTENDANCE
PERSON_UID (FK)
INSTITUTION
POST_SECONDAY_DEGREE
PERSON_SENSITIVE
PERSON_UID (FK)
PERSON_VETERAN
PERSON_UID (FK)
PERSON_SENSITIVE_RACE_SLOT
PERSON_UID (FK)
HOLD_SLOT
PERSON_UID (FK)
PERSON_SENSITIVE_RACE
PERSON_UID (FK)
HOLD
PERSON_UID (FK)
HOLD
HOLD_FROM_DATE
HOLD_TO_DATE
COMBINED_ACADEMIC_OUTCOME
PERSON_UID (FK)
INSTITUTION
OUTCOME_NUMBER
PREVIOUS_DEGREE
PERSON_UID (FK)
INSTITUTION (FK)
DEGREE
SEQUENCE_NUMBER
PREVIOUS_EDUCATION
PERSON_UID (FK)
INSTITUTION (FK)
TEST_SLOT
PERSON_UID (FK)
PREVIOUS_EDUCATION_SLOT
PERSON_UID (FK)
SPECIAL_ACTIVITY
ENTITY_UID (FK)
SPECIAL_ACTIVITY
LEADERSHIP_ROLE
SPORT
PERSON_UID (FK)
ACADEMIC_PERIOD
ACTIVITY
TEST
PERSON_UID (FK)
TEST
TEST_DATE
INTERNET_ADDRESS_CURRENT
ENTITY_UID (FK)
ALTERNATIVE_ID
ENTITY_UID (FK)
INTERNET_ADDRESS
ENTITY_UID
INTERNET_ADDRESS_TYPE
INTERNET_ADDRESS
Special_Activity, Special_Activity_Slot, Special_Activity_Year, and Special_Activity_Year_Slot can be joined to Person Detail by ENTITY_UID. They also have a relationship to Organizational_Constituent by ENTITY_UID.
Internet Address, Internet Address Current, Alternate ID can be joined to Person Detail by ENTITY_UID
TEST_PERCENTILE
PERSON_UID (FK)
TEST (FK)
TEST_DATE (FK)
TEST_PERCENTILE_TYPE
SPECIAL_ACTIVITY_SLOT
ENTITY_UID (FK)
PROFILE_CODE
SPECIAL_ACTIVITY_RULE
SPECIAL_ACTIVITY_YEAR
ENTITY_UID (FK)
ACTIVITY
PARTICIPATION_YEAR
SPECIAL_ACTIVITY_YEAR_SLOT
ENTITY_UID (FK)
ACTIVITY

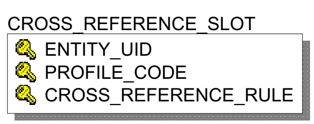
Relationship

Relationships using a Relationship Type



Relationships using a Slotted View

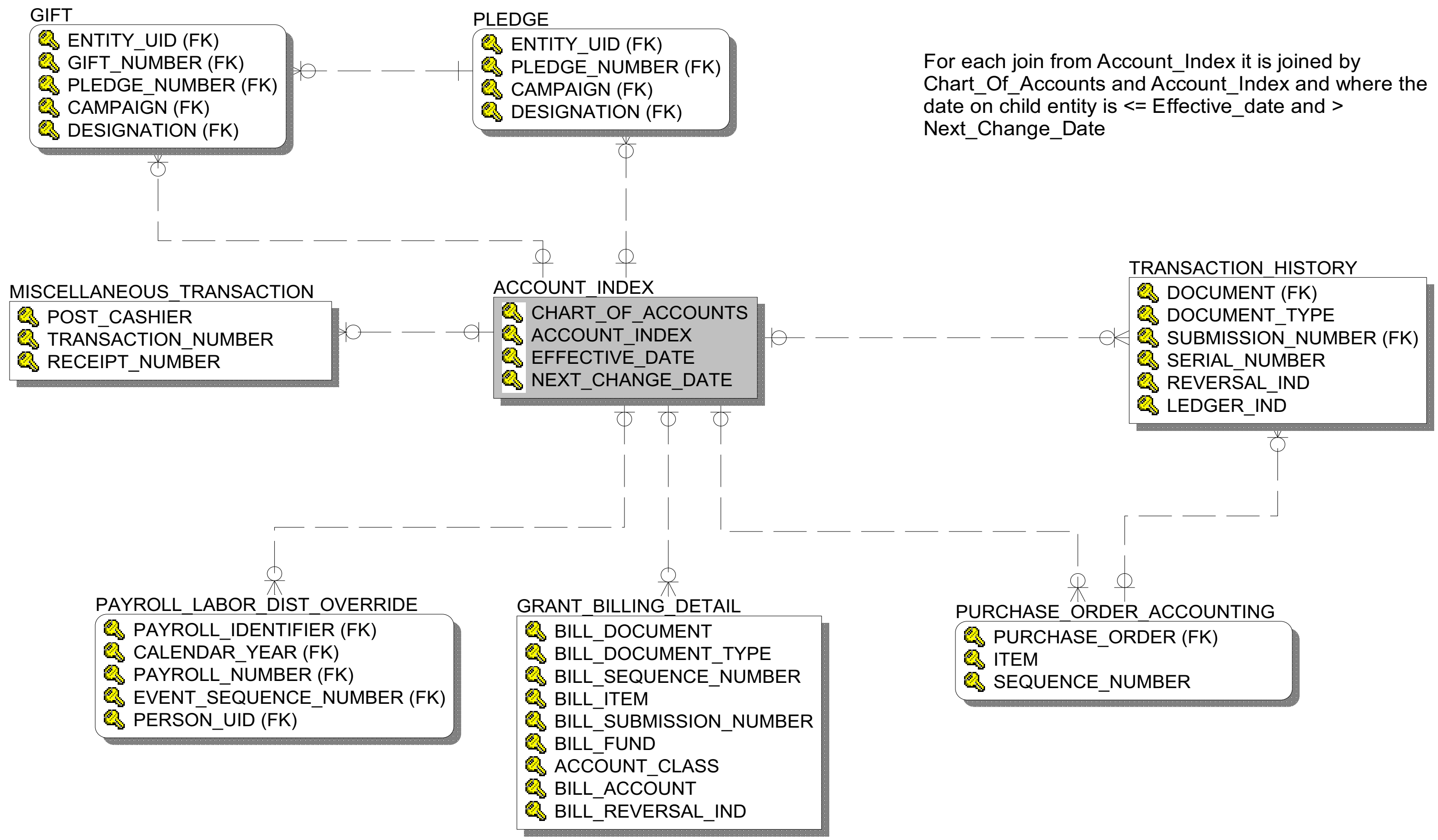
Organization Entity can join to Cross Reference Slot on ENTITY_UID.



Person Detail can join to Cross Reference Slot on PERSON_UID.

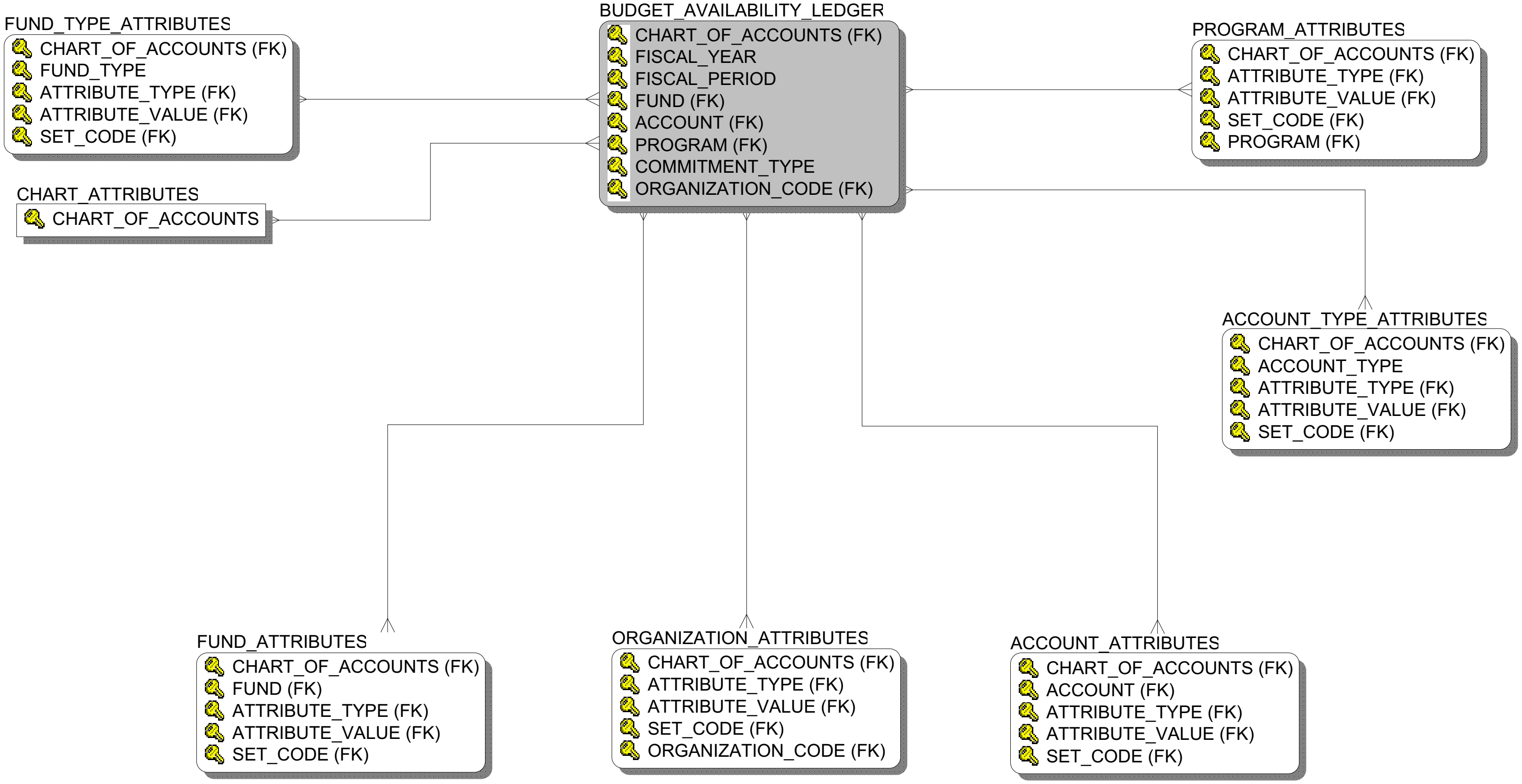
Finance

Account Index Audit

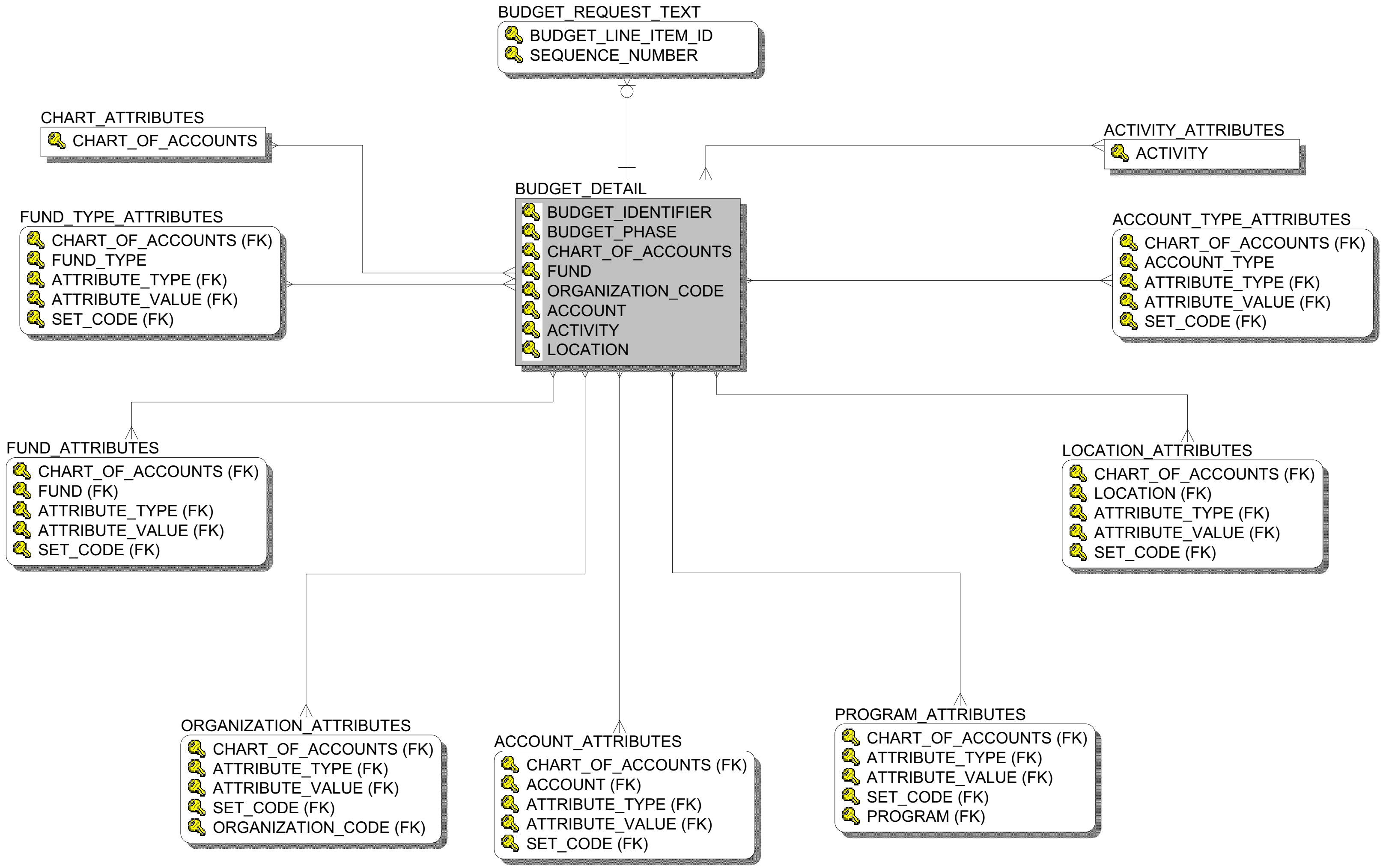


For each join from Account_Index it is joined by Chart_Of_Accounts and Account_Index and where the date on child entity is <= Effective_date and > Next_Change_Date

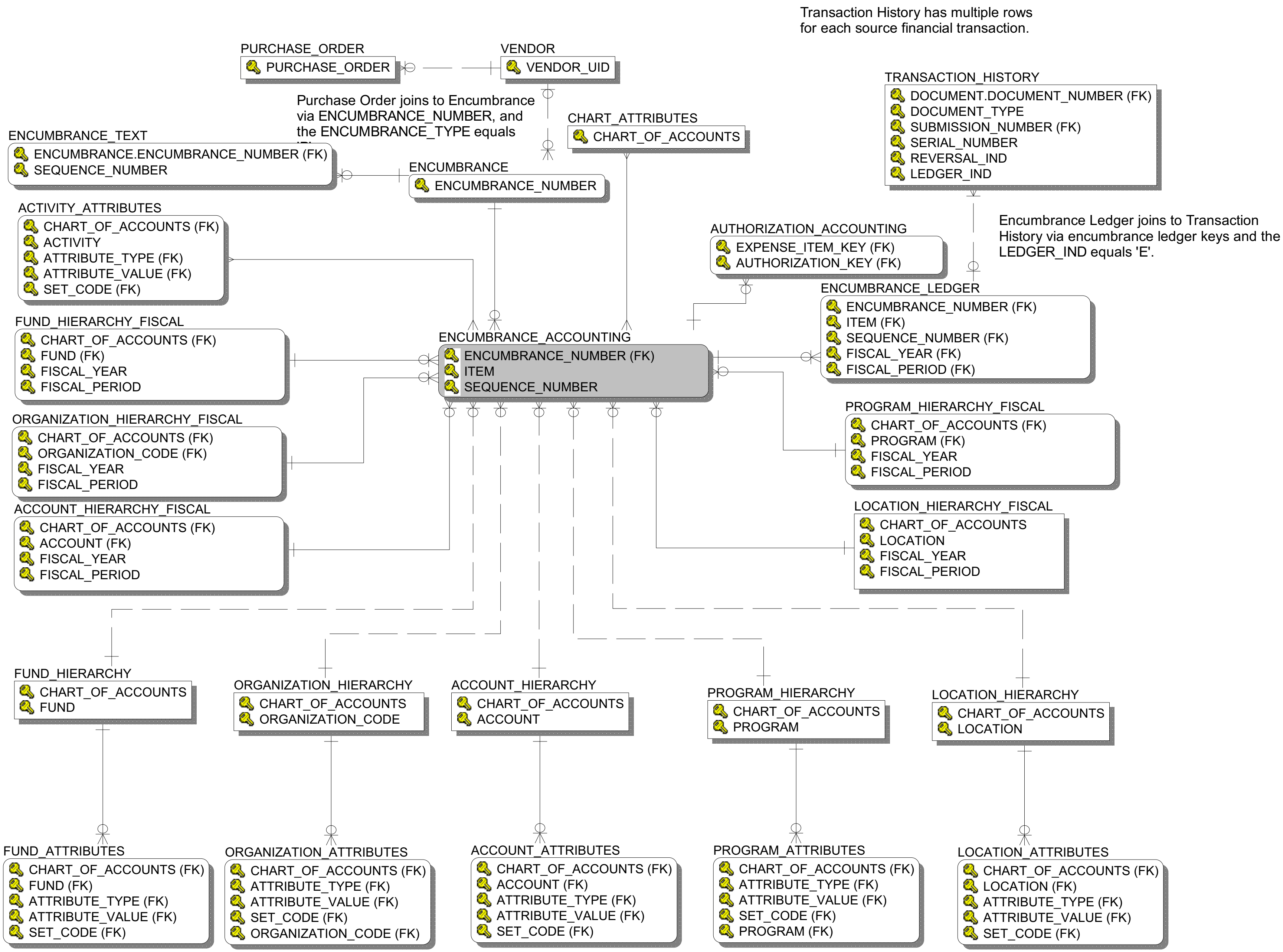
Budget Availability Ledger



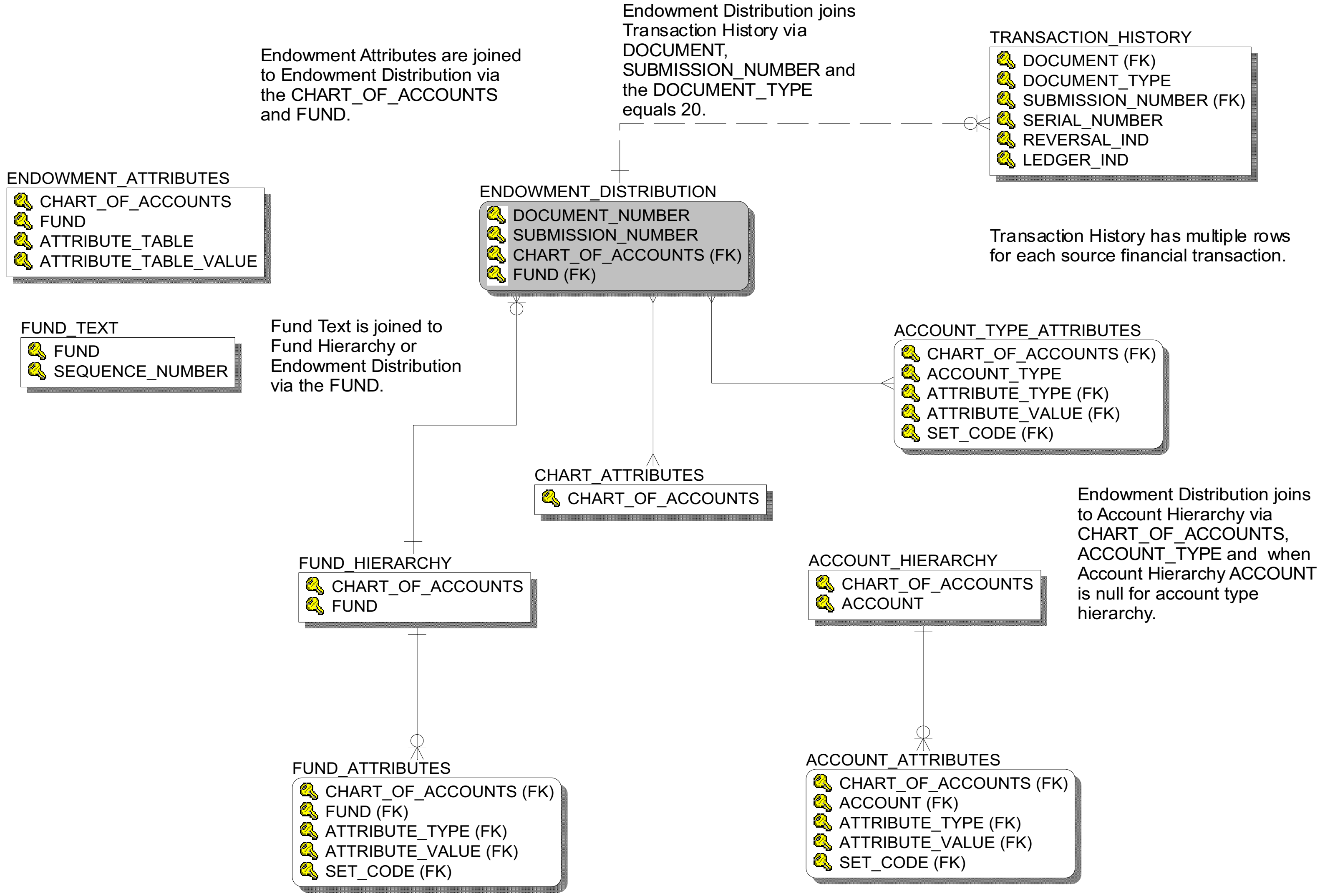
Budget Detail



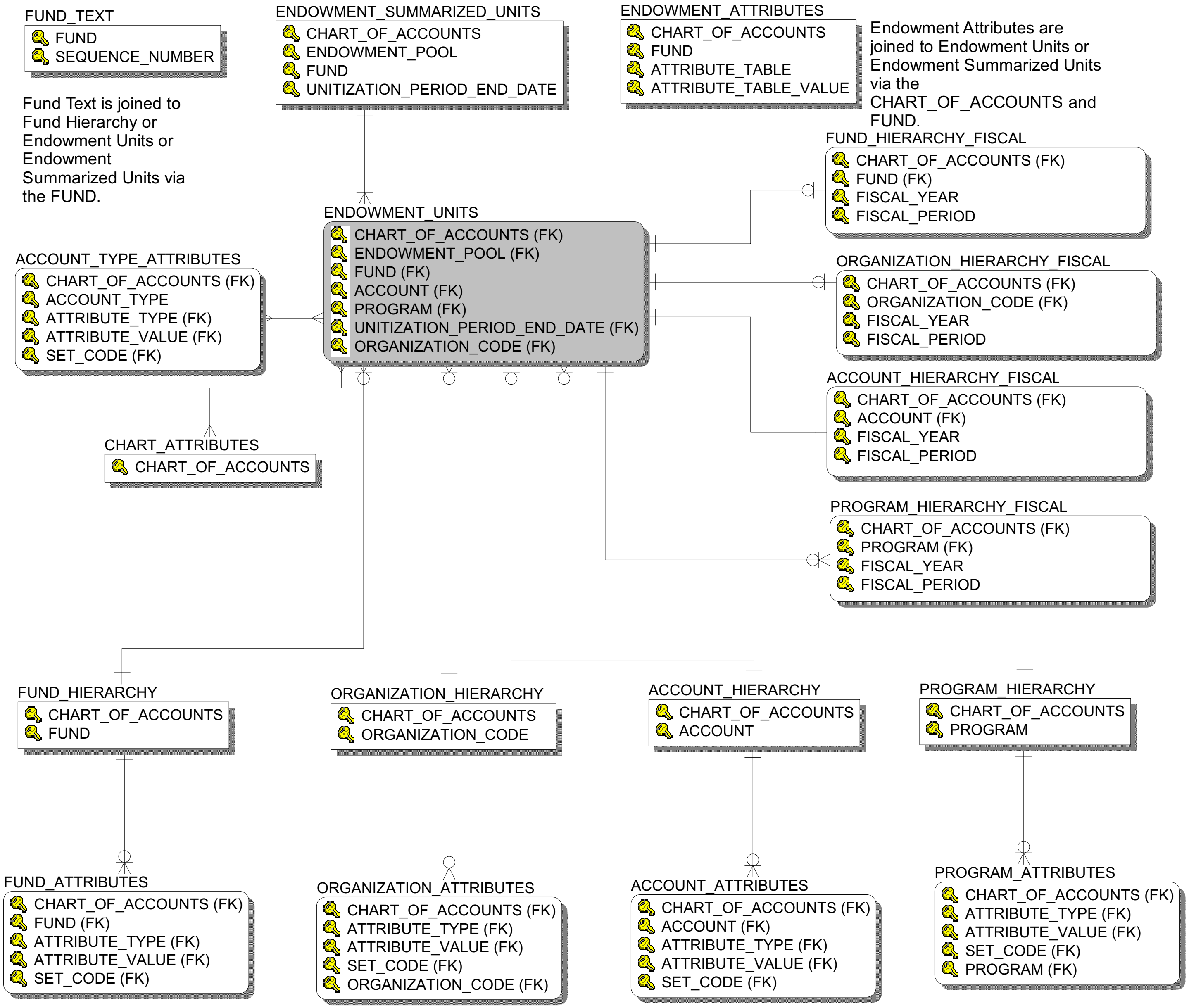
Encumbrance


Transaction History has multiple rows for each source financial transaction.
PURCHASE_ORDER
PURCHASE_ORDER
VENDOR
VENDOR_UID
Purchase Order joins to Encumbrance via ENCUMBRANCE_NUMBER, and the ENCUMBRANCE_TYPE equals
CHART_ATTRIBUTES
CHART_OF_ACCOUNTS
TRANSACTION_HISTORY
DOCUMENT.DOCUMENT_NUMBER (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND
ENCUMBRANCE_TEXT
ENCUMBRANCE.ENCUMBRANCE_NUMBER (FK)
SEQUENCE_NUMBER
ENCUMBRANCE
ENCUMBRANCE_NUMBER
ACTIVITY_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ACTIVITY
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
AUTHORIZATION_ACCOUNTING
EXPENSE_ITEM_KEY (FK)
AUTHORIZATION_KEY (FK)
Encumbrance Ledger joins to Transaction History via encumbrance ledger keys and the LEDGER_IND equals 'E'.
ENCUMBRANCE_LEDGER
ENCUMBRANCE_NUMBER (FK)
ITEM (FK)
SEQUENCE_NUMBER (FK)
FISCAL_YEAR (FK)
FISCAL_PERIOD (FK)
FUND_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS (FK)
FUND (FK)
FISCAL_YEAR
FISCAL_PERIOD
ENCUMBRANCE_ACCOUNTING
ENCUMBRANCE_NUMBER (FK)
ITEM
SEQUENCE_NUMBER
ORGANIZATION_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS (FK)
ORGANIZATION_CODE (FK)
FISCAL_YEAR
FISCAL_PERIOD
PROGRAM_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS (FK)
PROGRAM (FK)
FISCAL_YEAR
FISCAL_PERIOD
ACCOUNT_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS (FK)
ACCOUNT (FK)
FISCAL_YEAR
FISCAL_PERIOD
LOCATION_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS
LOCATION
FISCAL_YEAR
FISCAL_PERIOD
FUND_HIERARCHY
CHART_OF_ACCOUNTS
FUND
ORGANIZATION_HIERARCHY
CHART_OF_ACCOUNTS
ORGANIZATION_CODE
ACCOUNT_HIERARCHY
CHART_OF_ACCOUNTS
ACCOUNT
PROGRAM_HIERARCHY
CHART_OF_ACCOUNTS
PROGRAM
LOCATION_HIERARCHY
CHART_OF_ACCOUNTS
LOCATION
FUND_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
FUND (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
ORGANIZATION_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
ORGANIZATION_CODE (FK)
ACCOUNT_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ACCOUNT (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
PROGRAM_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
PROGRAM (FK)
LOCATION_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
LOCATION (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)

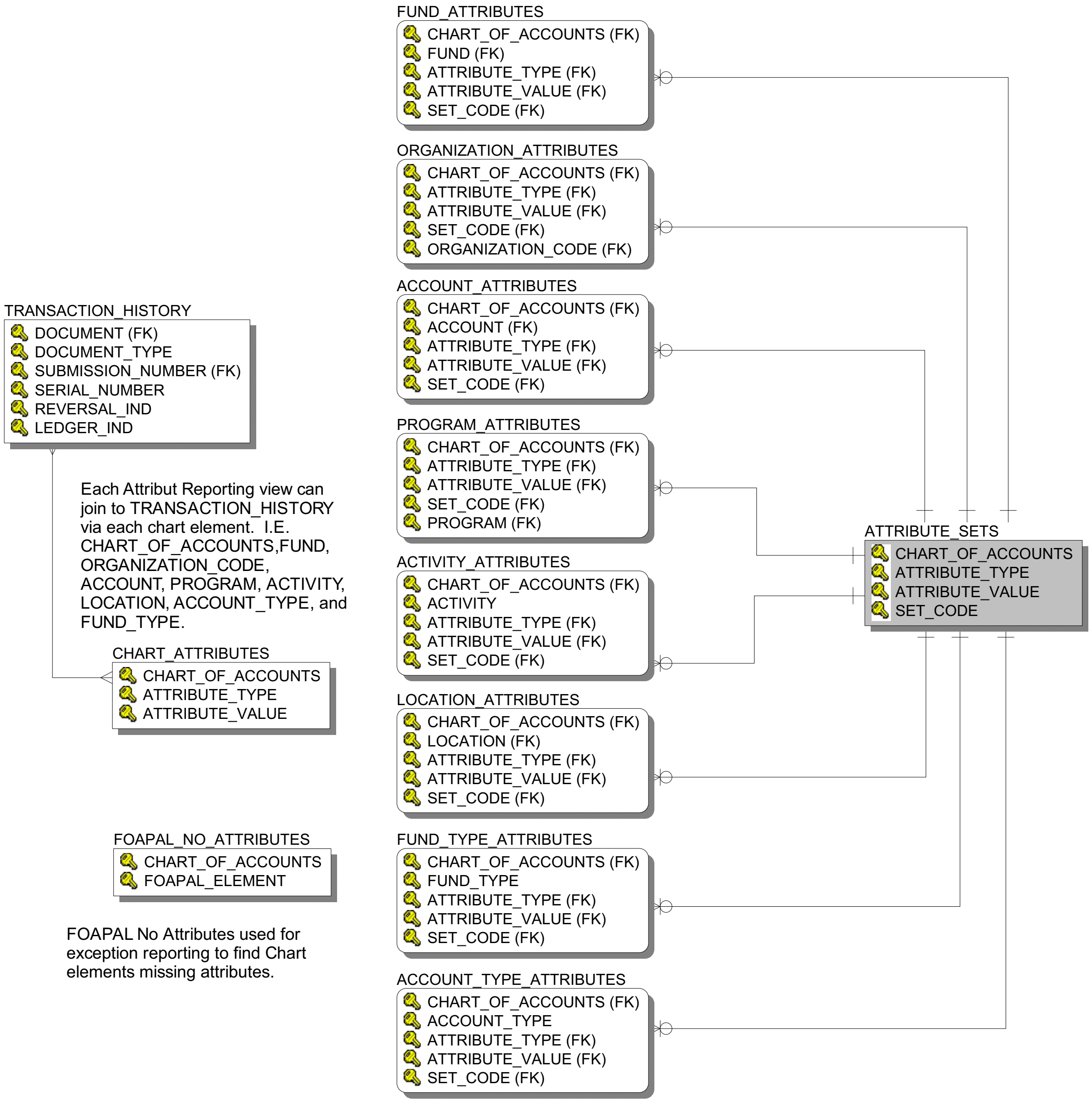
Endowment Distribution



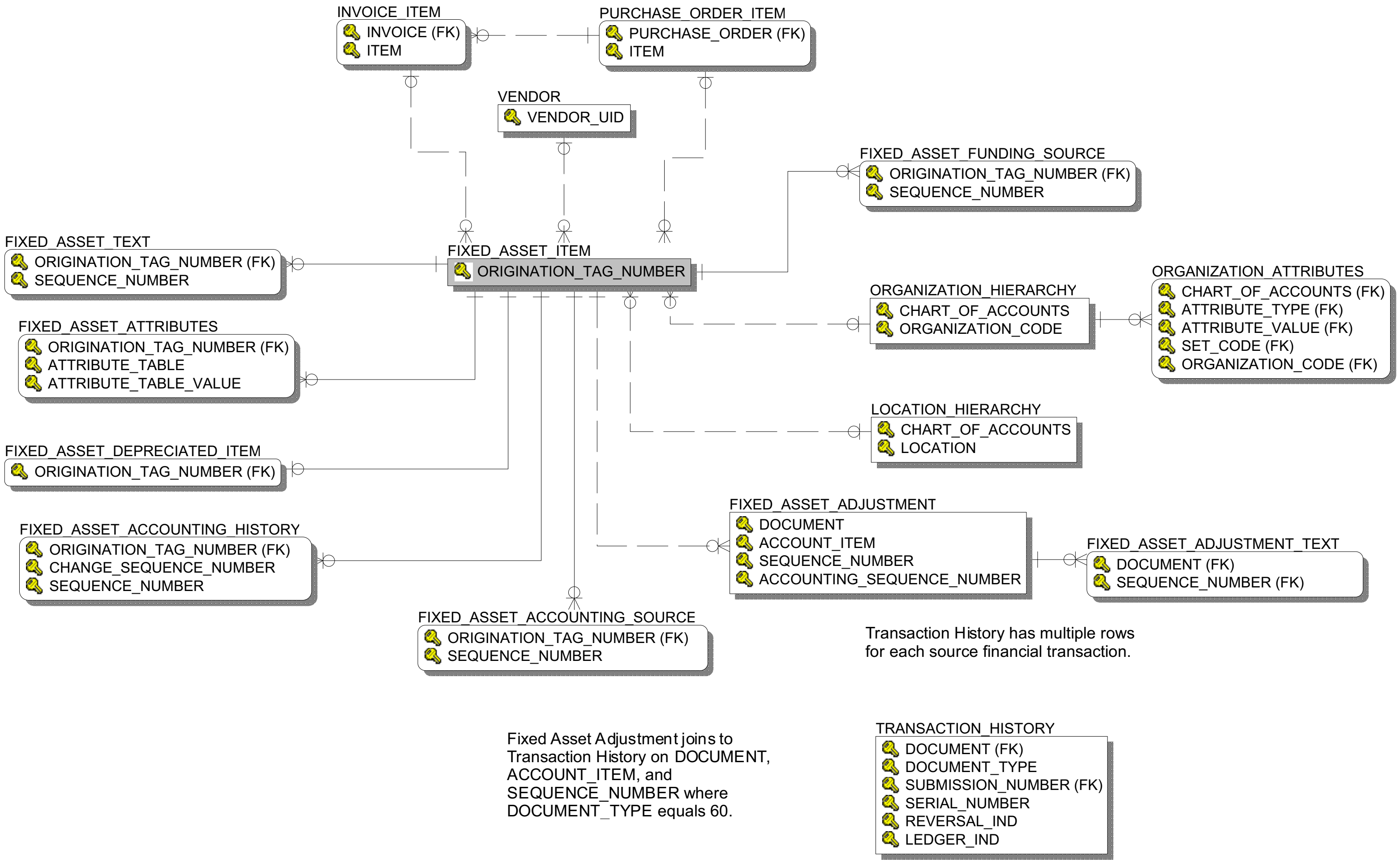
Endowment Units


FUND_TEXT
FUND
SEQUENCE_NUMBER
Fund Text is joined to Fund Hierarchy or Endowment Units or Endowment Summarized Units via the FUND.
ENDOWMENT_SUMMARIZED_UNITS
CHART_OF_ACCOUNTS
ENDOWMENT_POOL
FUND
UNITIZATION_PERIOD_END_DATE
ENDOWMENT_ATTRIBUTES
CHART_OF_ACCOUNTS
FUND
ATTRIBUTE_TABLE
ATTRIBUTE_TABLE_VALUE
Endowment Attributes are joined to Endowment Units or Endowment Summarized Units via the CHART_OF_ACCOUNTS and FUND.
FUND_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS (FK)
FUND (FK)
FISCAL_YEAR
FISCAL_PERIOD
ENDOWMENT_UNITS
CHART_OF_ACCOUNTS (FK)
ENDOWMENT_POOL (FK)
FUND (FK)
ACCOUNT (FK)
PROGRAM (FK)
UNITIZATION_PERIOD_END_DATE (FK)
ORGANIZATION_CODE (FK)
ACCOUNT_TYPE_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ACCOUNT_TYPE
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
ORGANIZATION_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS (FK)
ORGANIZATION_CODE (FK)
FISCAL_YEAR
FISCAL_PERIOD
ACCOUNT_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS (FK)
ACCOUNT (FK)
FISCAL_YEAR
FISCAL_PERIOD
CHART_ATTRIBUTES
CHART_OF_ACCOUNTS
PROGRAM_HIERARCHY_FISCAL
CHART_OF_ACCOUNTS (FK)
PROGRAM (FK)
FISCAL_YEAR
FISCAL_PERIOD
FUND_HIERARCHY
CHART_OF_ACCOUNTS
FUND
ORGANIZATION_HIERARCHY
CHART_OF_ACCOUNTS
ORGANIZATION_CODE
ACCOUNT_HIERARCHY
CHART_OF_ACCOUNTS
ACCOUNT
PROGRAM_HIERARCHY
CHART_OF_ACCOUNTS
PROGRAM
FUND_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
FUND (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
ORGANIZATION_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
ORGANIZATION_CODE (FK)
ACCOUNT_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ACCOUNT (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
PROGRAM_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
PROGRAM (FK)

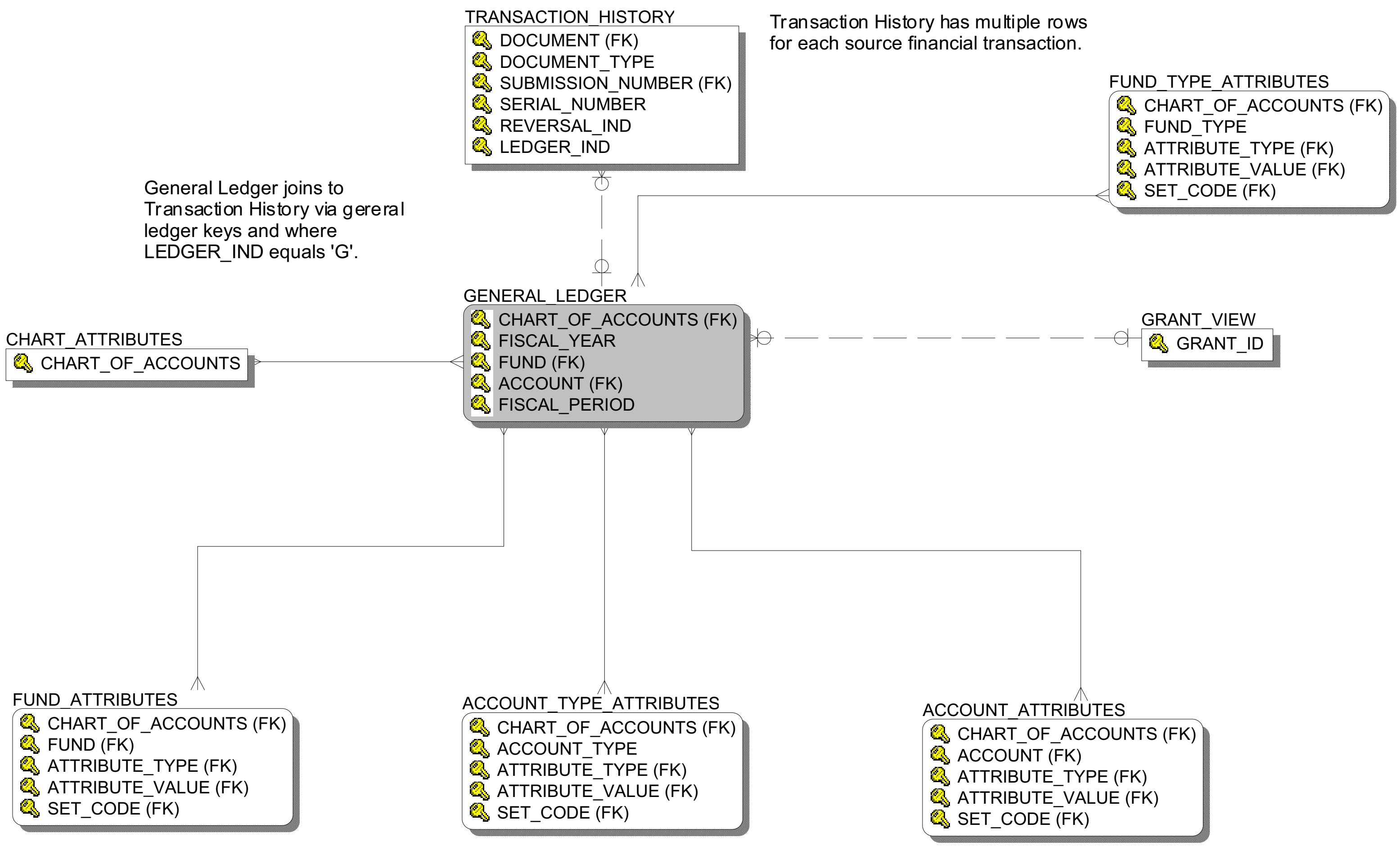
Finance Reporting Attributes


FUND_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
FUND (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
ORGANIZATION_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
ORGANIZATION_CODE (FK)
TRANSACTION_HISTORY
DOCUMENT (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND
ACCOUNT_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ACCOUNT (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
PROGRAM_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
PROGRAM (FK)
Each Attribut Reporting view can join to TRANSACTION_HISTORY via each chart element. I.E. CHART_OF_ACCOUNTS,FUND, ORGANIZATION_CODE, ACCOUNT, PROGRAM, ACTIVITY, LOCATION, ACCOUNT_TYPE, and FUND_TYPE.
ATTRIBUTE_SETS
CHART_OF_ACCOUNTS
ATTRIBUTE_TYPE
ATTRIBUTE_VALUE
SET_CODE
ACTIVITY_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ACTIVITY
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
CHART_ATTRIBUTES
CHART_OF_ACCOUNTS
ATTRIBUTE_TYPE
ATTRIBUTE_VALUE
LOCATION_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
LOCATION (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
FOAPAL_NO_ATTRIBUTES
CHART_OF_ACCOUNTS
FOAPAL_ELEMENT
FUND_TYPE_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
FUND_TYPE
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
FOAPAL No Attributes used for exception reporting to find Chart elements missing attributes.
ACCOUNT_TYPE_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ACCOUNT_TYPE
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)

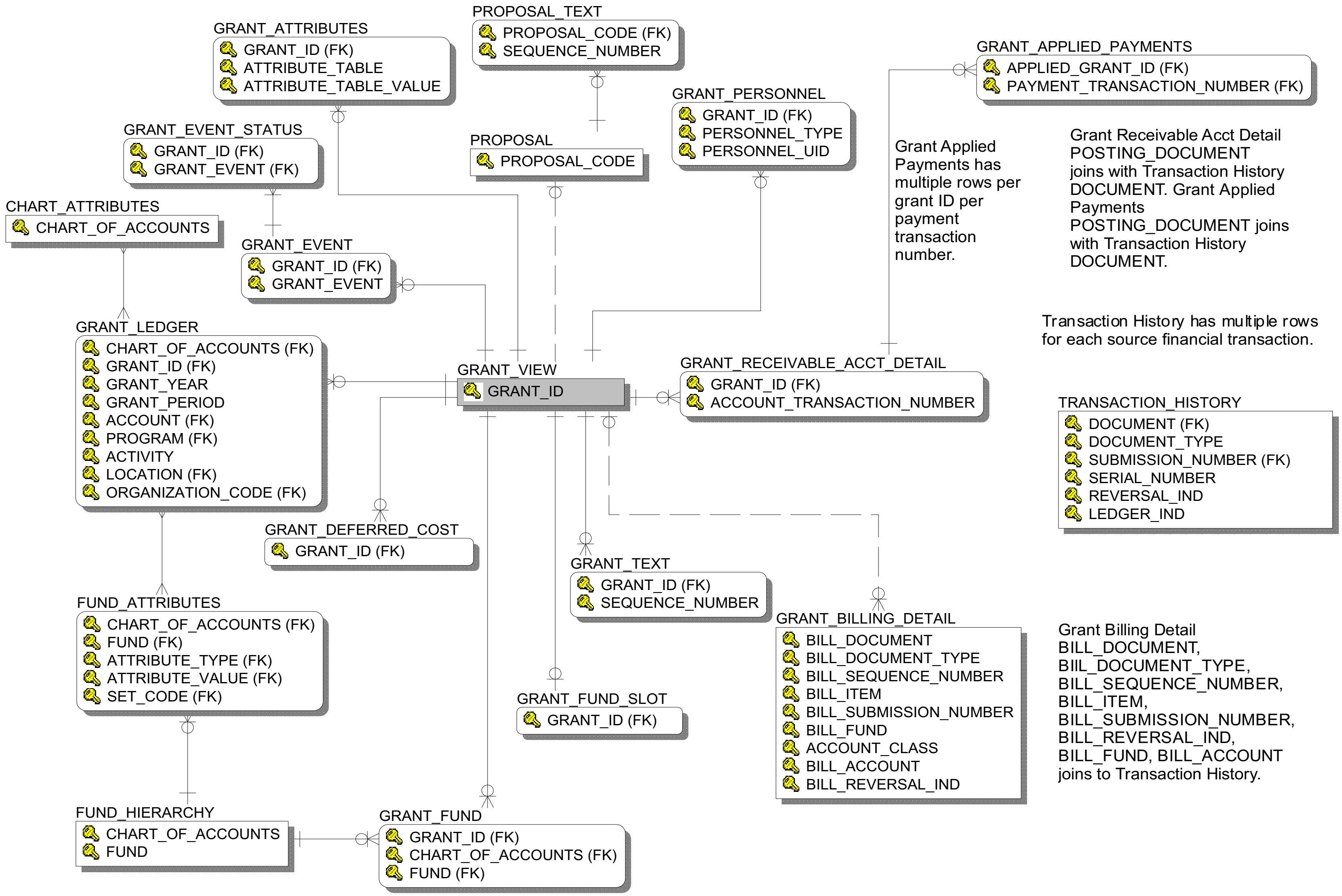
Fixed Asset


INVOICE_ITEM
INVOICE (FK)
ITEM
PURCHASE_ORDER_ITEM
PURCHASE_ORDER (FK)
ITEM
VENDOR
VENDOR_UID
FIXED_ASSET_FUNDING_SOURCE
ORIGINATION_TAG_NUMBER (FK)
SEQUENCE_NUMBER
FIXED_ASSET_TEXT
ORIGINATION_TAG_NUMBER (FK)
SEQUENCE_NUMBER
FIXED_ASSET_ITEM
ORIGINATION_TAG_NUMBER
ORGANIZATION_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
ORGANIZATION_CODE (FK)
ORGANIZATION_HIERARCHY
CHART_OF_ACCOUNTS
ORGANIZATION_CODE
FIXED_ASSET_ATTRIBUTES
ORIGINATION_TAG_NUMBER (FK)
ATTRIBUTE_TABLE
ATTRIBUTE_TABLE_VALUE
LOCATION_HIERARCHY
CHART_OF_ACCOUNTS
LOCATION
FIXED_ASSET_DEPRECIATED_ITEM
ORIGINATION_TAG_NUMBER (FK)
FIXED_ASSET_ADJUSTMENT
DOCUMENT
ACCOUNT_ITEM
SEQUENCE_NUMBER
ACCOUNTING_SEQUENCE_NUMBER
FIXED_ASSET_ACCOUNTING_HISTORY
ORIGINATION_TAG_NUMBER (FK)
CHANGE_SEQUENCE_NUMBER
SEQUENCE_NUMBER
FIXED_ASSET_ADJUSTMENT_TEXT
DOCUMENT (FK)
SEQUENCE_NUMBER (FK)
FIXED_ASSET_ACCOUNTING_SOURCE
ORIGINATION_TAG_NUMBER (FK)
SEQUENCE_NUMBER
Transaction History has multiple rows for each source financial transaction.
Fixed Asset Adjustment joins to Transaction History on DOCUMENT, ACCOUNT_ITEM, and SEQUENCE_NUMBER where DOCUMENT_TYPE equals 60.
TRANSACTION_HISTORY
DOCUMENT (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND

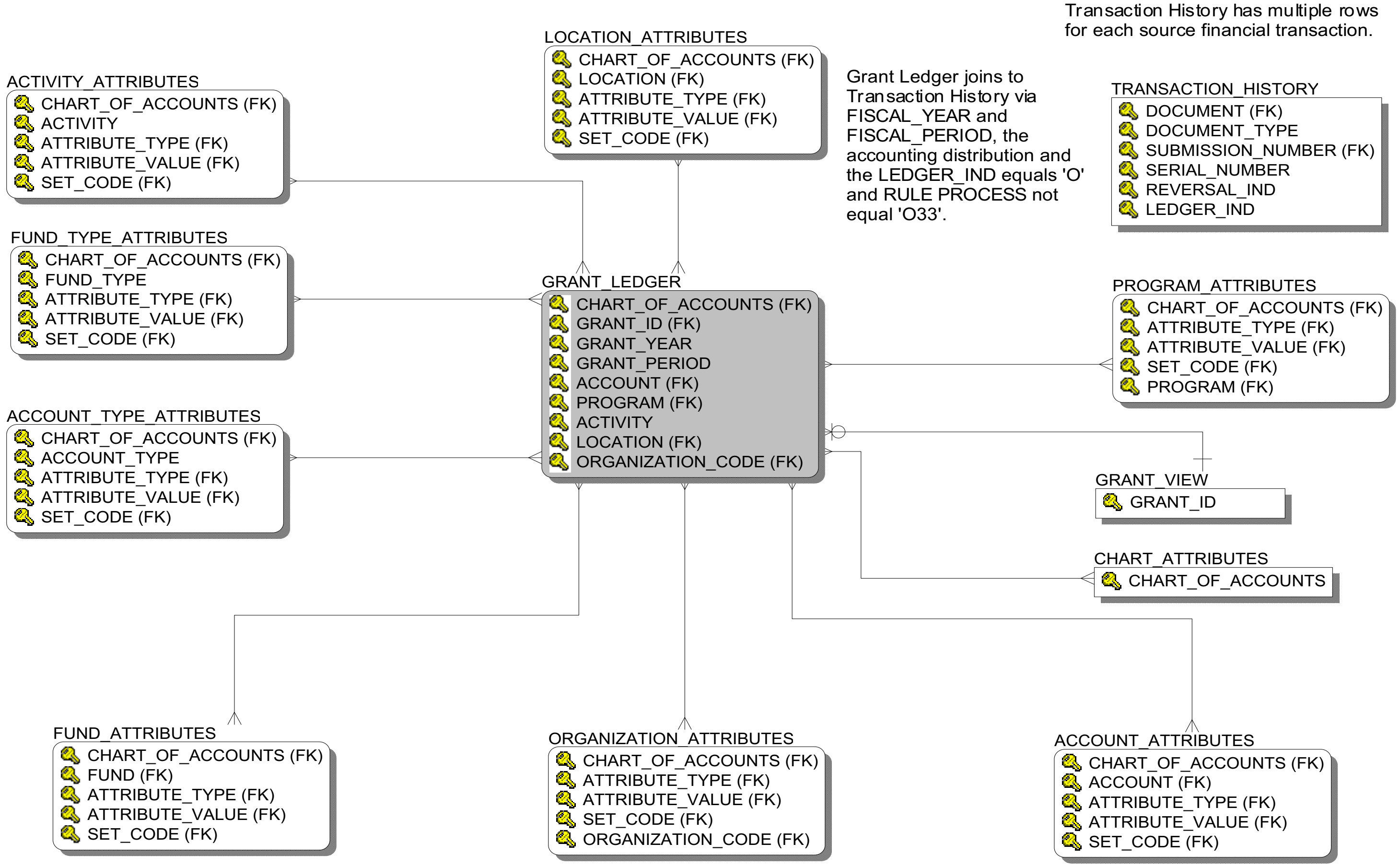
General Ledger



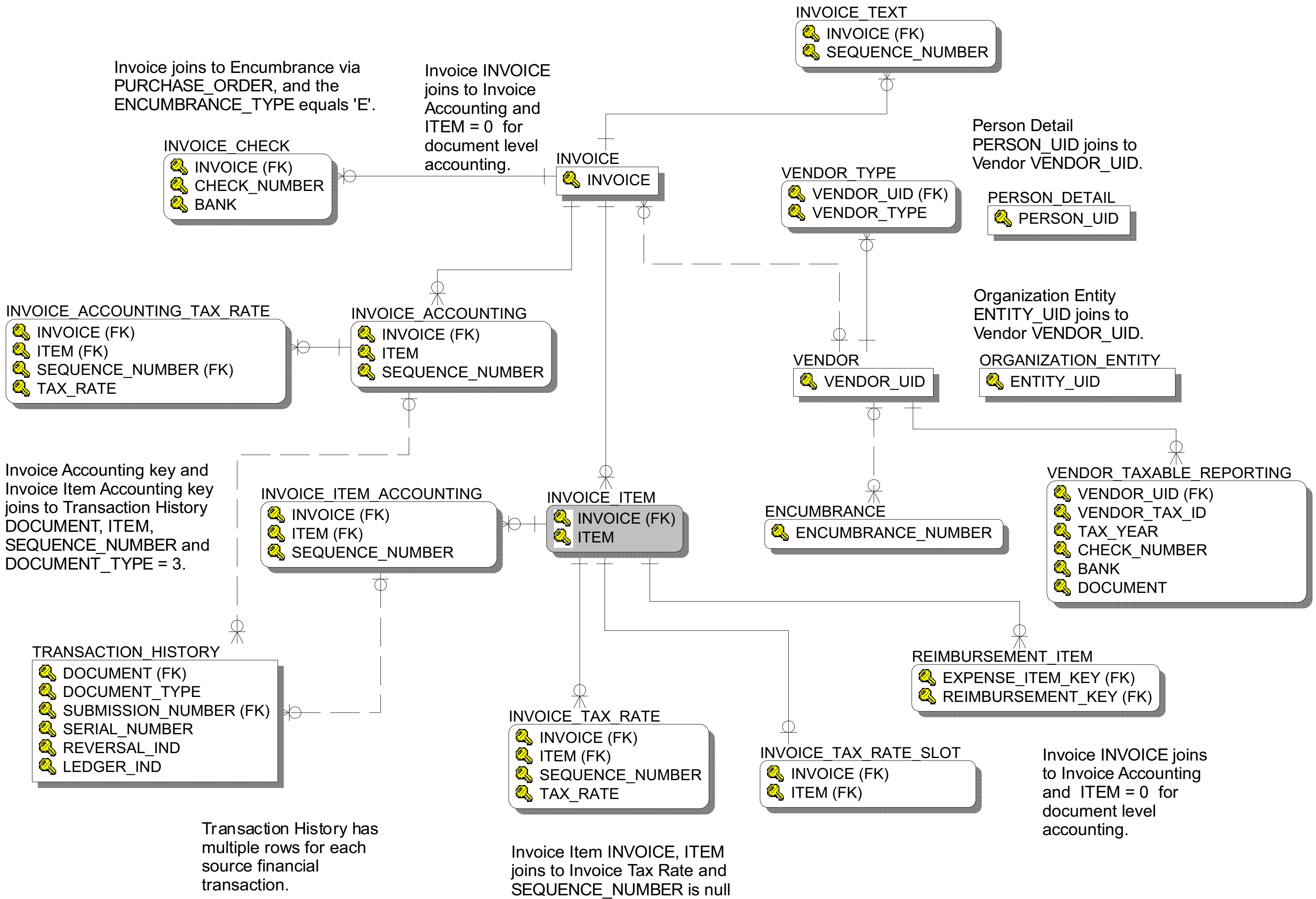
Grant and Project


GRANT_ATTRIBUTES
GRANT_ID (FK)
ATTRIBUTE_TABLE
ATTRIBUTE_TABLE_VALUE
PROPOSAL_TEXT
PROPOSAL_CODE (FK)
SEQUENCE_NUMBER
GRANT_APPLIED_PAYMENTS
APPLIED_GRANT_ID (FK)
PAYMENT_TRANSACTION_NUMBER (FK)
GRANT_EVENT_STATUS
GRANT_ID (FK)
GRANT_EVENT (FK)
GRANT_PERSONNEL
GRANT_ID (FK)
PERSONNEL_TYPE
PERSONNEL_UID
PROPOSAL
PROPOSAL_CODE
Grant Applied Payments has multiple rows per grant ID per payment transaction number.
Grant Receivable Acct Detail POSTING_DOCUMENT joins with Transaction History DOCUMENT. Grant Applied Payments POSTING_DOCUMENT joins with Transaction History DOCUMENT.
CHART_ATTRIBUTES
CHART_OF_ACCOUNTS
GRANT_EVENT
GRANT_ID (FK)
GRANT_EVENT
Transaction History has multiple rows for each source financial transaction.
GRANT_LEDGER
CHART_OF_ACCOUNTS (FK)
GRANT_ID (FK)
GRANT_YEAR
GRANT_PERIOD
ACCOUNT (FK)
PROGRAM (FK)
ACTIVITY
LOCATION (FK)
ORGANIZATION_CODE (FK)
GRANT_VIEW
GRANT_ID
GRANT_RECEIVABLE_ACCT_DETAIL
GRANT_ID (FK)
ACCOUNT_TRANSACTION_NUMBER
TRANSACTION_HISTORY
DOCUMENT (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND
GRANT_DEFERRED_COST
GRANT_ID (FK)
GRANT_TEXT
GRANT_ID (FK)
SEQUENCE_NUMBER
FUND_ATTRIBUTES
CHART_OF_ACCOUNTS (FK)
FUND (FK)
ATTRIBUTE_TYPE (FK)
ATTRIBUTE_VALUE (FK)
SET_CODE (FK)
GRANT_BILLING_DETAIL
BILL_DOCUMENT
BILL_DOCUMENT_TYPE
BILL_SEQUENCE_NUMBER
BILL_ITEM
BILL_SUBMISSION_NUMBER
BILL_FUND
ACCOUNT_CLASS
BILL_ACCOUNT
BILL_REVERSAL_IND
Grant Billing Detail BILL_DOCUMENT, BIIL_DOCUMENT_TYPE, BILL_SEQUENCE_NUMBER, BILL_ITEM, BILL_SUBMISSION_NUMBER, BILL_REVERSAL_IND, BILL_FUND, BILL_ACCOUNT joins to Transaction History.
GRANT_FUND_SLOT
GRANT_ID (FK)
FUND_HIERARCHY
CHART_OF_ACCOUNTS
FUND
GRANT_FUND
GRANT_ID (FK)
CHART_OF_ACCOUNTS (FK)
FUND (FK)

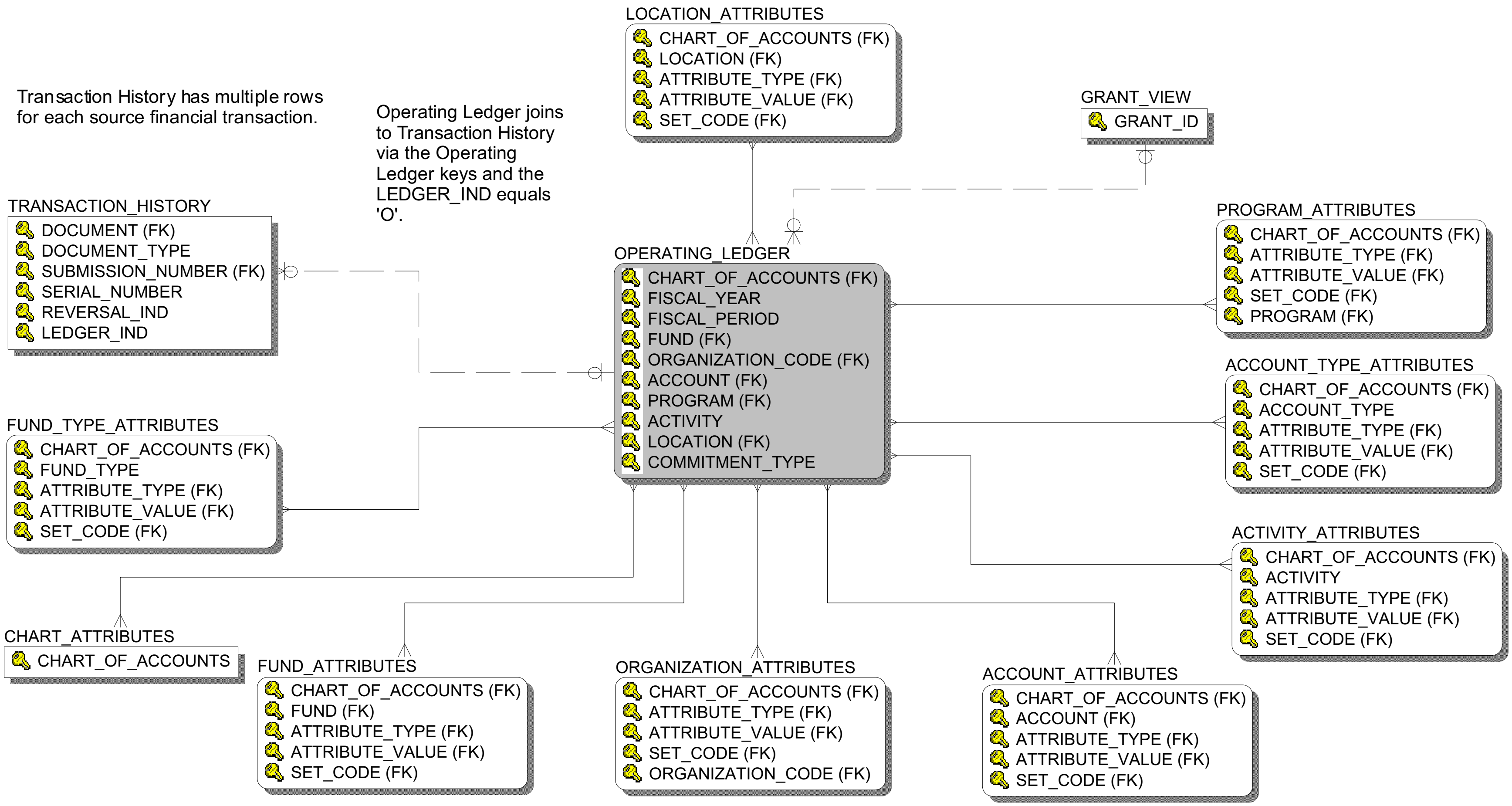
Grant Ledger



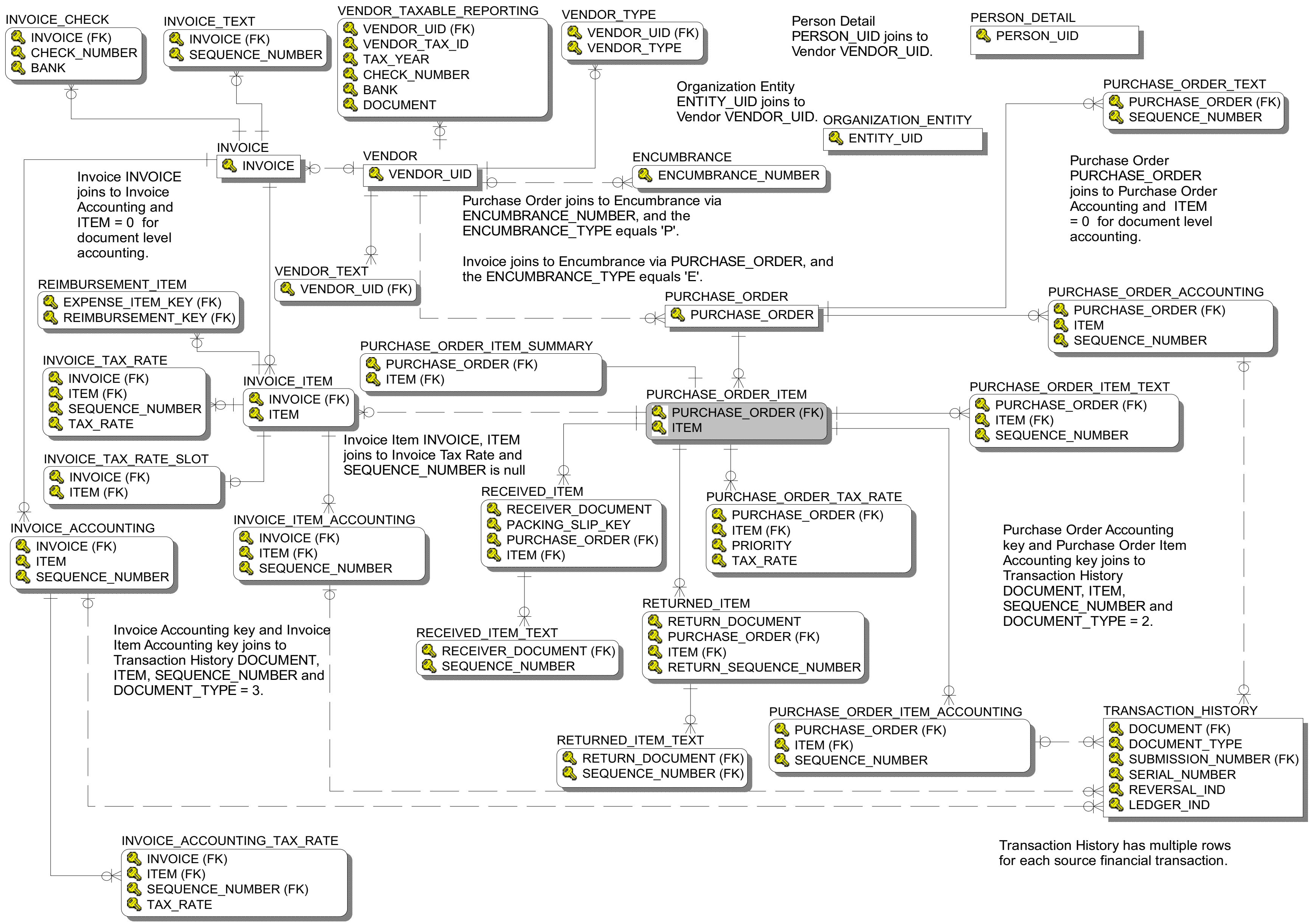
Invoice Payable


INVOICE_TEXT
INVOICE (FK)
SEQUENCE_NUMBER
Invoice joins to Encumbrance via PURCHASE_ORDER, and the ENCUMBRANCE_TYPE equals 'E'.
Invoice INVOICE joins to Invoice Accounting and ITEM = 0 for document level accounting.
INVOICE_CHECK
INVOICE (FK)
CHECK_NUMBER
BANK
INVOICE
INVOICE
Person Detail PERSON_UID joins to Vendor VENDOR_UID.
VENDOR_TYPE
VENDOR_UID (FK)
VENDOR_TYPE
PERSON_DETAIL
PERSON_UID
INVOICE_ACCOUNTING_TAX_RATE
INVOICE (FK)
ITEM (FK)
SEQUENCE_NUMBER (FK)
TAX_RATE
INVOICE_ACCOUNTING
INVOICE (FK)
ITEM
SEQUENCE_NUMBER
Organization Entity ENTITY_UID joins to Vendor VENDOR_UID.
VENDOR
VENDOR_UID
ORGANIZATION_ENTITY
ENTITY_UID
Invoice Accounting key and Invoice Item Accounting key joins to Transaction History DOCUMENT, ITEM, SEQUENCE_NUMBER and DOCUMENT_TYPE = 3.
INVOICE_ITEM_ACCOUNTING
INVOICE (FK)
ITEM (FK)
SEQUENCE_NUMBER
INVOICE_ITEM
INVOICE (FK)
ITEM
ENCUMBRANCE
ENCUMBRANCE_NUMBER
VENDOR_TAXABLE_REPORTING
VENDOR_UID (FK)
VENDOR_TAX_ID
TAX_YEAR
CHECK_NUMBER
BANK
DOCUMENT
TRANSACTION_HISTORY
DOCUMENT (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND
REIMBURSEMENT_ITEM
EXPENSE_ITEM_KEY (FK)
REIMBURSEMENT_KEY (FK)
INVOICE_TAX_RATE
INVOICE (FK)
ITEM (FK)
SEQUENCE_NUMBER
TAX_RATE
INVOICE_TAX_RATE_SLOT
INVOICE (FK)
ITEM (FK)
Invoice INVOICE joins to Invoice Accounting and ITEM = 0 for document level accounting.
Transaction History has multiple rows for each source financial transaction.
Invoice Item INVOICE, ITEM joins to Invoice Tax Rate and SEQUENCE_NUMBER is null

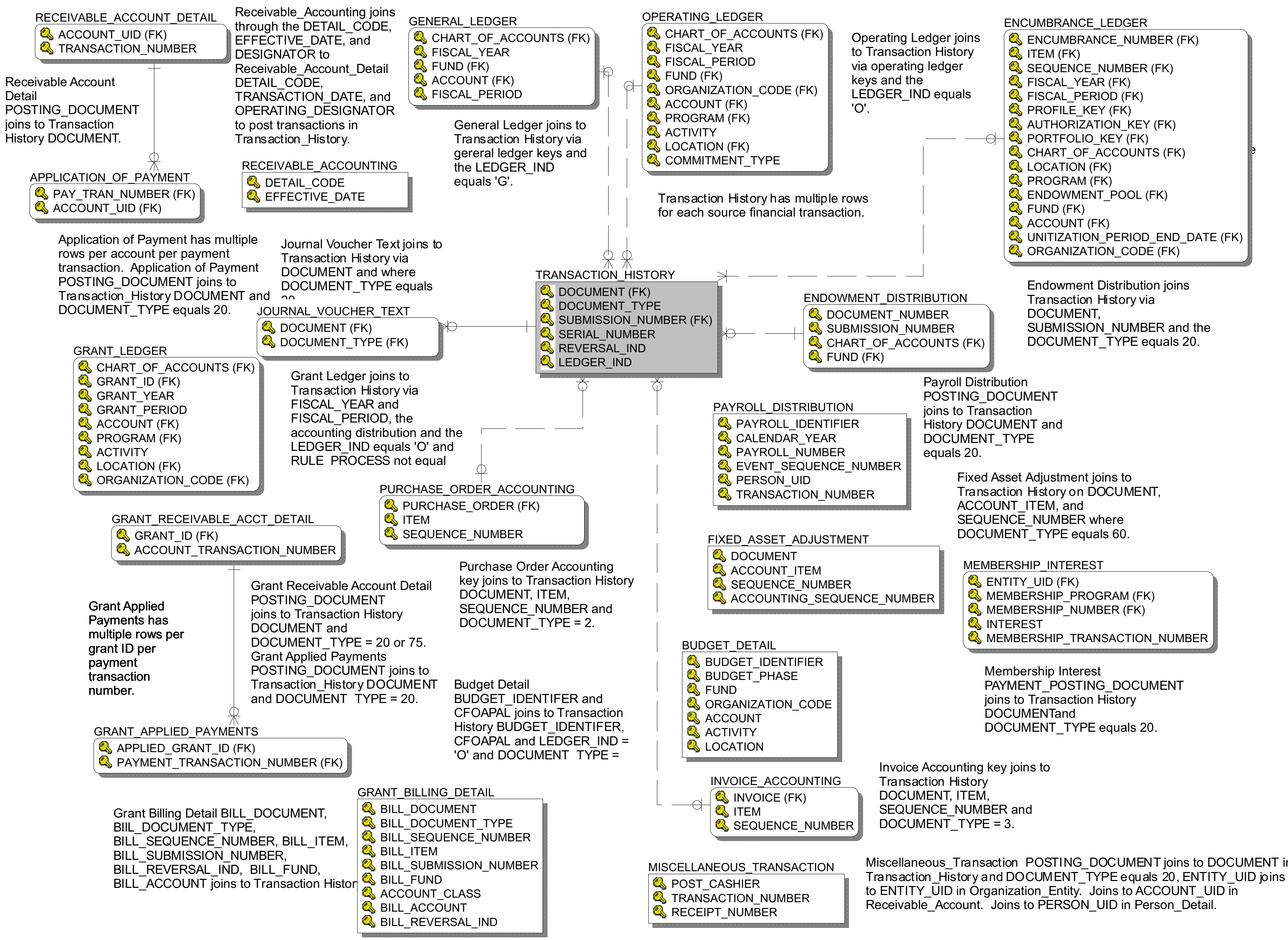
Operating Ledger



Purchasing Payable


INVOICE_CHECK
INVOICE (FK)
CHECK_NUMBER
BANK
INVOICE_TEXT
INVOICE (FK)
SEQUENCE_NUMBER
VENDOR_TAXABLE_REPORTING
VENDOR_UID (FK)
VENDOR_TAX_ID
TAX_YEAR
CHECK_NUMBER
BANK
DOCUMENT
VENDOR_TYPE
VENDOR_UID (FK)
VENDOR_TYPE
Person Detail PERSON_UID joins to Vendor VENDOR_UID.
PERSON_DETAIL
PERSON_UID
Organization Entity ENTITY_UID joins to Vendor VENDOR_UID.
ORGANIZATION_ENTITY
ENTITY_UID
PURCHASE_ORDER_TEXT
PURCHASE_ORDER (FK)
SEQUENCE_NUMBER
INVOICE
INVOICE
VENDOR
VENDOR_UID
ENCUMBRANCE
ENCUMBRANCE_NUMBER
Invoice INVOICE joins to Invoice Accounting and ITEM = 0 for document level accounting.
Purchase Order joins to Encumbrance via ENCUMBRANCE_NUMBER, and the ENCUMBRANCE_TYPE equals 'P'.
Invoice joins to Encumbrance via PURCHASE_ORDER, and the ENCUMBRANCE_TYPE equals 'E'.
Purchase Order PURCHASE_ORDER joins to Purchase Order Accounting and ITEM = 0 for document level accounting.
VENDOR_TEXT
VENDOR_UID (FK)
REIMBURSEMENT_ITEM
EXPENSE_ITEM_KEY (FK)
REIMBURSEMENT_KEY (FK)
PURCHASE_ORDER
PURCHASE_ORDER
PURCHASE_ORDER_ACCOUNTING
PURCHASE_ORDER (FK)
ITEM
SEQUENCE_NUMBER
PURCHASE_ORDER_ITEM_SUMMARY
PURCHASE_ORDER (FK)
ITEM (FK)
INVOICE_TAX_RATE
INVOICE (FK)
ITEM (FK)
SEQUENCE_NUMBER
TAX_RATE
INVOICE_ITEM
INVOICE (FK)
ITEM
PURCHASE_ORDER_ITEM
PURCHASE_ORDER (FK)
ITEM
PURCHASE_ORDER_ITEM_TEXT
PURCHASE_ORDER (FK)
ITEM (FK)
SEQUENCE_NUMBER
Invoice Item INVOICE, ITEM joins to Invoice Tax Rate and SEQUENCE_NUMBER is null
INVOICE_TAX_RATE_SLOT
INVOICE (FK)
ITEM (FK)
RECEIVED_ITEM
RECEIVER_DOCUMENT
PACKING_SLIP_KEY
PURCHASE_ORDER (FK)
ITEM (FK)
PURCHASE_ORDER_TAX_RATE
PURCHASE_ORDER (FK)
ITEM (FK)
PRIORITY
TAX_RATE
Purchase Order Accounting key and Purchase Order Item Accounting key joins to Transaction History DOCUMENT, ITEM, SEQUENCE_NUMBER and DOCUMENT_TYPE = 2.
INVOICE_ACCOUNTING
INVOICE (FK)
ITEM
SEQUENCE_NUMBER
INVOICE_ITEM_ACCOUNTING
INVOICE (FK)
ITEM (FK)
SEQUENCE_NUMBER
Invoice Accounting key and Invoice Item Accounting key joins to Transaction History DOCUMENT, ITEM, SEQUENCE_NUMBER and DOCUMENT_TYPE = 3.
RECEIVED_ITEM_TEXT
RECEIVER_DOCUMENT (FK)
SEQUENCE_NUMBER
RETURNED_ITEM
RETURN_DOCUMENT
PURCHASE_ORDER (FK)
ITEM (FK)
RETURN_SEQUENCE_NUMBER
RETURNED_ITEM_TEXT
RETURN_DOCUMENT (FK)
SEQUENCE_NUMBER (FK)
PURCHASE_ORDER_ITEM_ACCOUNTING
PURCHASE_ORDER (FK)
ITEM (FK)
SEQUENCE_NUMBER
TRANSACTION_HISTORY
DOCUMENT (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND
INVOICE_ACCOUNTING_TAX_RATE
INVOICE (FK)
ITEM (FK)
SEQUENCE_NUMBER (FK)
TAX_RATE
Transaction History has multiple rows for each source financial transaction.

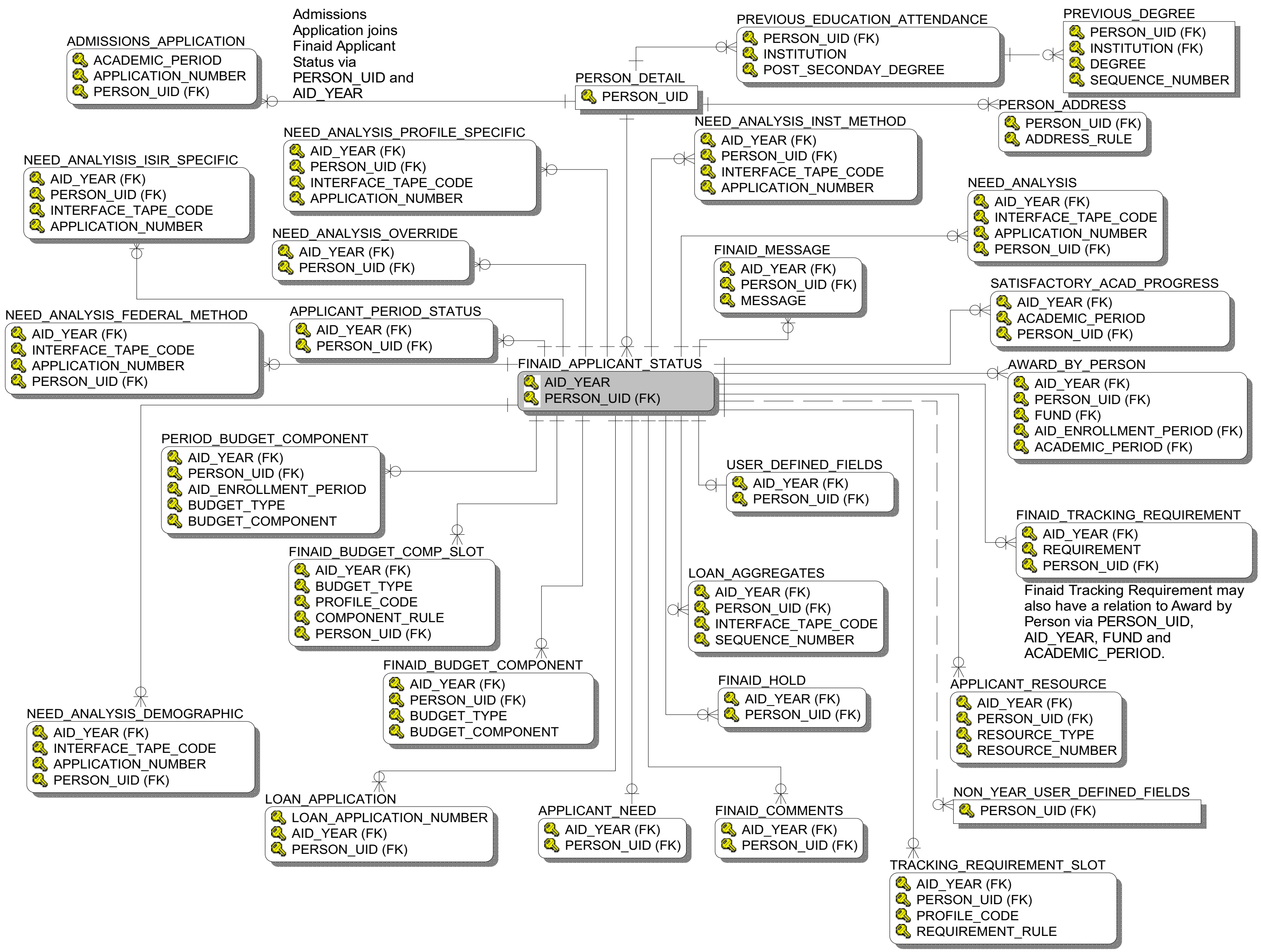
Transaction History



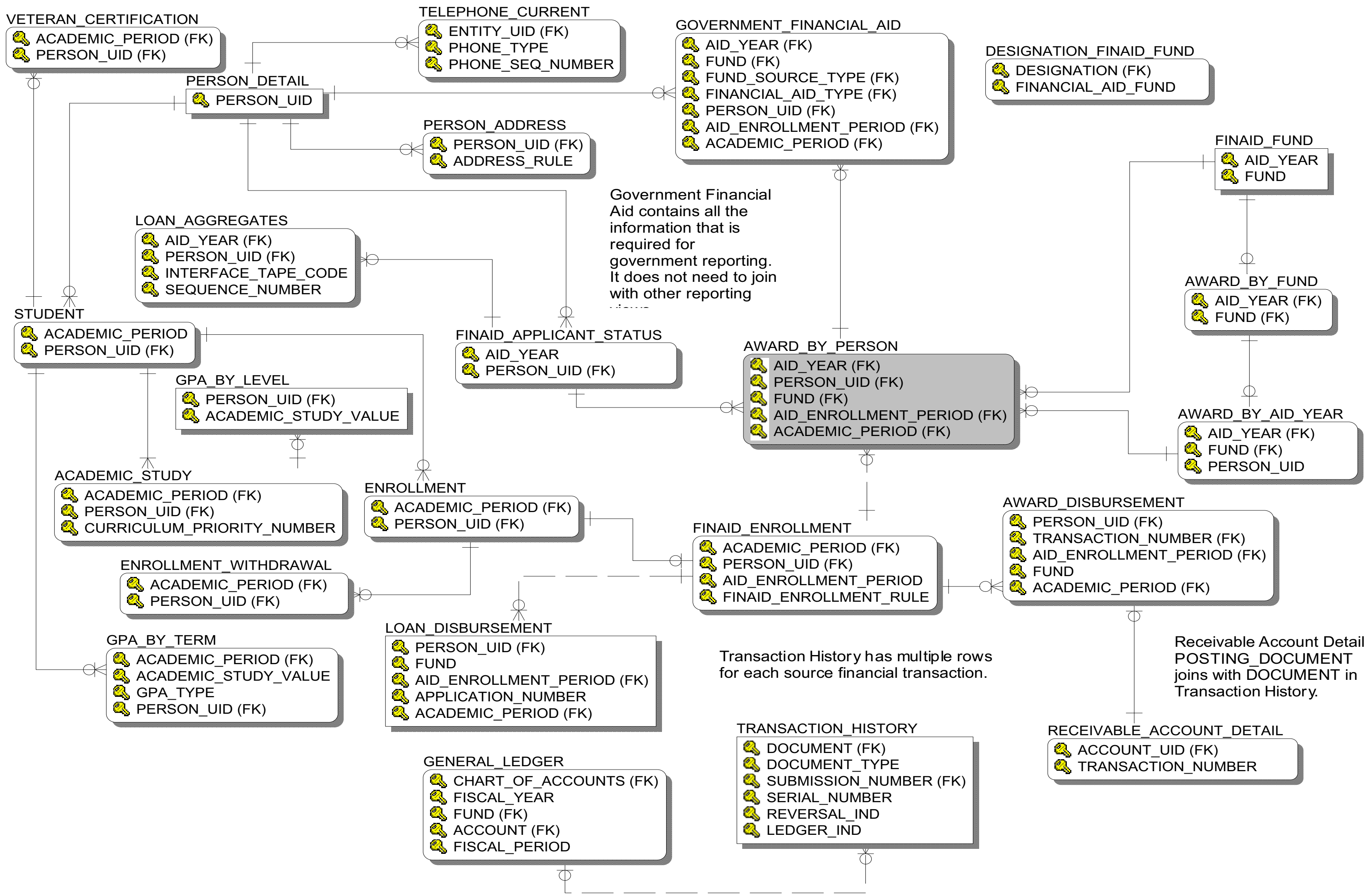
RECEIVABLE_ACCOUNT_DETAIL
ACCOUNT_UID (FK)
TRANSACTION_NUMBER
Receivable_Accounting joins through the DETAIL_CODE, EFFECTIVE_DATE, and DESIGNATOR to Receivable_Account_Detail DETAIL_CODE, TRANSACTION_DATE, and OPERATING_DESIGNATOR to post transactions in Transaction_History.
GENERAL_LEDGER
CHART_OF_ACCOUNTS (FK)
FISCAL_YEAR
FUND (FK)
ACCOUNT (FK)
FISCAL_PERIOD
OPERATING_LEDGER
CHART_OF_ACCOUNTS (FK)
FISCAL_YEAR
FISCAL_PERIOD
FUND (FK)
ORGANIZATION_CODE (FK)
ACCOUNT (FK)
PROGRAM (FK)
ACTIVITY
LOCATION (FK)
COMMITMENT_TYPE
Operating Ledger joins to Transaction History via operating ledger keys and the LEDGER_IND equals 'O'.
ENCUMBRANCE_LEDGER
ENCUMBRANCE_NUMBER (FK)
ITEM (FK)
SEQUENCE_NUMBER (FK)
FISCAL_YEAR (FK)
FISCAL_PERIOD (FK)
PROFILE_KEY (FK)
AUTHORIZATION_KEY (FK)
PORTFOLIO_KEY (FK)
CHART_OF_ACCOUNTS (FK)
LOCATION (FK)
PROGRAM (FK)
ENDOWMENT_POOL (FK)
FUND (FK)
ACCOUNT (FK)
UNITIZATION_PERIOD_END_DATE (FK)
ORGANIZATION_CODE (FK)
Receivable Account Detail POSTING_DOCUMENT joins to Transaction History DOCUMENT.
General Ledger joins to Transaction History via gereral ledger keys and the LEDGER_IND equals 'G'.
RECEIVABLE_ACCOUNTING
DETAIL_CODE
EFFECTIVE_DATE
APPLICATION_OF_PAYMENT
PAY_TRAN_NUMBER (FK)
ACCOUNT_UID (FK)
Transaction History has multiple rows for each source financial transaction.
Application of Payment has multiple rows per account per payment transaction. Application of Payment POSTING_DOCUMENT joins to Transaction_History DOCUMENT and DOCUMENT_TYPE equals 20.
Journal Voucher Text joins to Transaction History via DOCUMENT and where DOCUMENT_TYPE equals
TRANSACTION_HISTORY
DOCUMENT (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND
JOURNAL_VOUCHER_TEXT
DOCUMENT (FK)
DOCUMENT_TYPE (FK)
ENDOWMENT_DISTRIBUTION
DOCUMENT_NUMBER
SUBMISSION_NUMBER
CHART_OF_ACCOUNTS (FK)
FUND (FK)
Endowment Distribution joins Transaction History via DOCUMENT, SUBMISSION_NUMBER and the DOCUMENT_TYPE equals 20.
GRANT_LEDGER
CHART_OF_ACCOUNTS (FK)
GRANT_ID (FK)
GRANT_YEAR
GRANT_PERIOD
ACCOUNT (FK)
PROGRAM (FK)
ACTIVITY
LOCATION (FK)
ORGANIZATION_CODE (FK)
Grant Ledger joins to Transaction History via FISCAL_YEAR and FISCAL_PERIOD, the accounting distribution and the LEDGER_IND equals 'O' and RULE_PROCESS not equal
Payroll Distribution POSTING_DOCUMENT joins to Transaction History DOCUMENT and DOCUMENT_TYPE equals 20.
PAYROLL_DISTRIBUTION
PAYROLL_IDENTIFIER
CALENDAR_YEAR
PAYROLL_NUMBER
EVENT_SEQUENCE_NUMBER
PERSON_UID
TRANSACTION_NUMBER
Fixed Asset Adjustment joins to Transaction History on DOCUMENT, ACCOUNT_ITEM, and SEQUENCE_NUMBER where DOCUMENT_TYPE equals 60.
PURCHASE_ORDER_ACCOUNTING
PURCHASE_ORDER (FK)
ITEM
SEQUENCE_NUMBER
GRANT_RECEIVABLE_ACCT_DETAIL
GRANT_ID (FK)
ACCOUNT_TRANSACTION_NUMBER
FIXED_ASSET_ADJUSTMENT
DOCUMENT
ACCOUNT_ITEM
SEQUENCE_NUMBER
ACCOUNTING_SEQUENCE_NUMBER
MEMBERSHIP_INTEREST
ENTITY_UID (FK)
MEMBERSHIP_PROGRAM (FK)
MEMBERSHIP_NUMBER (FK)
INTEREST
MEMBERSHIP_TRANSACTION_NUMBER
Purchase Order Accounting key joins to Transaction History DOCUMENT, ITEM, SEQUENCE_NUMBER and DOCUMENT_TYPE = 2.
Grant Receivable Account Detail POSTING_DOCUMENT joins to Transaction History DOCUMENT and DOCUMENT_TYPE = 20 or 75.
Grant Applied Payments POSTING_DOCUMENT joins to Transaction_History DOCUMENT and DOCUMENT_TYPE = 20.
Grant Applied Payments has multiple rows per grant ID per payment transaction number.
BUDGET_DETAIL
BUDGET_IDENTIFIER
BUDGET_PHASE
FUND
ORGANIZATION_CODE
ACCOUNT
ACTIVITY
LOCATION
Membership Interest PAYMENT_POSTING_DOCUMENT joins to Transaction History DOCUMENTand DOCUMENT_TYPE equals 20.
Budget Detail BUDGET_IDENTIFER and CFOAPAL joins to Transaction History BUDGET_IDENTIFER, CFOAPAL and LEDGER_IND = 'O' and DOCUMENT_TYPE =
GRANT_APPLIED_PAYMENTS
APPLIED_GRANT_ID (FK)
PAYMENT_TRANSACTION_NUMBER (FK)
Invoice Accounting key joins to Transaction History DOCUMENT, ITEM, SEQUENCE_NUMBER and DOCUMENT_TYPE = 3.
INVOICE_ACCOUNTING
INVOICE (FK)
ITEM
SEQUENCE_NUMBER
GRANT_BILLING_DETAIL
BILL_DOCUMENT
BILL_DOCUMENT_TYPE
BILL_SEQUENCE_NUMBER
BILL_ITEM
BILL_SUBMISSION_NUMBER
BILL_FUND
ACCOUNT_CLASS
BILL_ACCOUNT
BILL_REVERSAL_IND
Grant Billing Detail BILL_DOCUMENT, BIIL_DOCUMENT_TYPE, BILL_SEQUENCE_NUMBER, BILL_ITEM, BILL_SUBMISSION_NUMBER, BILL_REVERSAL_IND, BILL_FUND, BILL_ACCOUNT joins to Transaction Histor
MISCELLANEOUS_TRANSACTION
POST_CASHIER
TRANSACTION_NUMBER
RECEIPT_NUMBER
Miscellaneous_Transaction POSTING_DOCUMENT joins to DOCUMENT in Transaction_History and DOCUMENT_TYPE equals 20, ENTITY_UID joins to ENTITY_UID in Organization_Entity. Joins to ACCOUNT_UID in Receivable_Account. Joins to PERSON_UID in Person_Detail.

Financial Aid

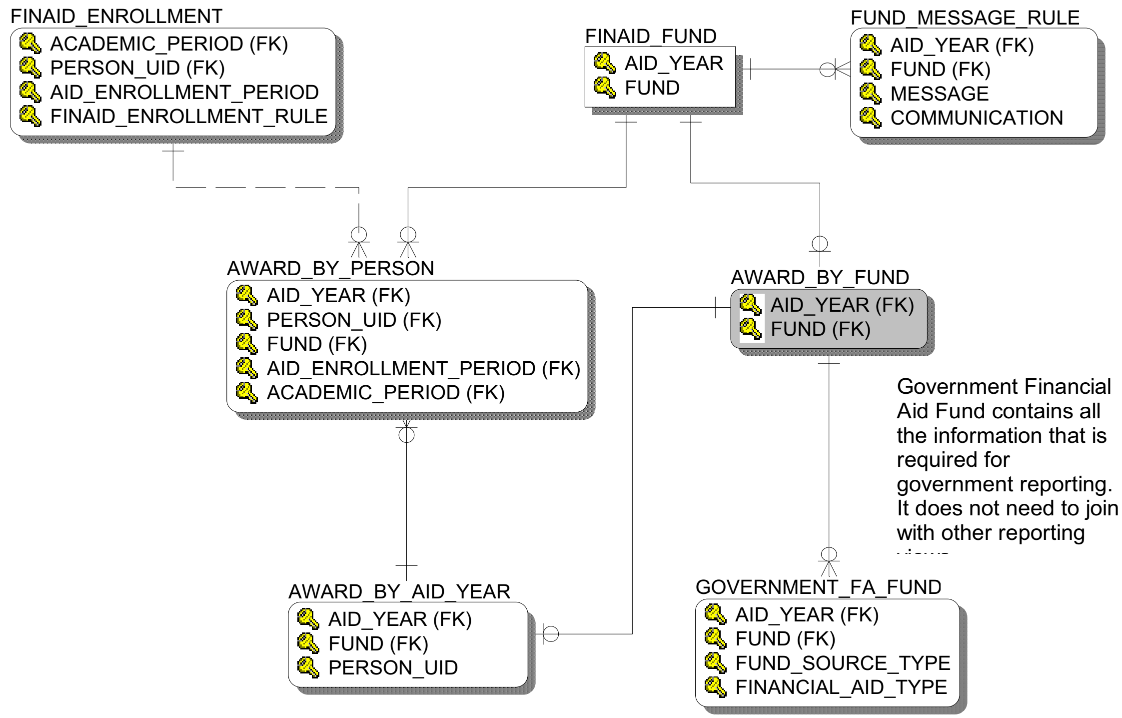
Financial Aid Application


ADMISSIONS_APPLICATION
ACADEMIC_PERIOD
APPLICATION_NUMBER
PERSON_UID (FK)
Admissions Application joins Finaid Applicant Status via PERSON_UID and AID_YEAR
PREVIOUS_EDUCATION_ATTENDANCE
PERSON_UID (FK)
INSTITUTION
POST_SECONDAY_DEGREE
PREVIOUS_DEGREE
PERSON_UID (FK)
INSTITUTION (FK)
DEGREE
SEQUENCE_NUMBER
PERSON_DETAIL
PERSON_UID
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
NEED_ANALYSIS_PROFILE_SPECIFIC
AID_YEAR (FK)
PERSON_UID (FK)
INTERFACE_TAPE_CODE
APPLICATION_NUMBER
NEED_ANALYSIS_INST_METHOD
AID_YEAR (FK)
PERSON_UID (FK)
INTERFACE_TAPE_CODE
APPLICATION_NUMBER
NEED_ANALYSIS_ISIR_SPECIFIC
AID_YEAR (FK)
PERSON_UID (FK)
INTERFACE_TAPE_CODE
APPLICATION_NUMBER
NEED_ANALYSIS
AID_YEAR (FK)
INTERFACE_TAPE_CODE
APPLICATION_NUMBER
PERSON_UID (FK)
NEED_ANALYSIS_OVERRIDE
AID_YEAR (FK)
PERSON_UID (FK)
FINAID_MESSAGE
AID_YEAR (FK)
PERSON_UID (FK)
MESSAGE
SATISFACTORY_ACAD_PROGRESS
AID_YEAR (FK)
ACADEMIC_PERIOD
PERSON_UID (FK)
NEED_ANALYSIS_FEDERAL_METHOD
AID_YEAR (FK)
INTERFACE_TAPE_CODE
APPLICATION_NUMBER
PERSON_UID (FK)
APPLICANT_PERIOD_STATUS
AID_YEAR (FK)
PERSON_UID (FK)
FINAID_APPLICANT_STATUS
AID_YEAR
PERSON_UID (FK)
AWARD_BY_PERSON
AID_YEAR (FK)
PERSON_UID (FK)
FUND (FK)
AID_ENROLLMENT_PERIOD (FK)
ACADEMIC_PERIOD (FK)
PERIOD_BUDGET_COMPONENT
AID_YEAR (FK)
PERSON_UID (FK)
AID_ENROLLMENT_PERIOD
BUDGET_TYPE
BUDGET_COMPONENT
USER_DEFINED_FIELDS
AID_YEAR (FK)
PERSON_UID (FK)
FINAID_TRACKING_REQUIREMENT
AID_YEAR (FK)
REQUIREMENT
PERSON_UID (FK)
Finaid Tracking Requirement may also have a relation to Award by Person via PERSON_UID, AID_YEAR, FUND and ACADEMIC_PERIOD.
FINAID_BUDGET_COMP_SLOT
AID_YEAR (FK)
BUDGET_TYPE
PROFILE_CODE
COMPONENT_RULE
PERSON_UID (FK)
LOAN_AGGREGATES
AID_YEAR (FK)
PERSON_UID (FK)
INTERFACE_TAPE_CODE
SEQUENCE_NUMBER
FINAID_BUDGET_COMPONENT
AID_YEAR (FK)
PERSON_UID (FK)
BUDGET_TYPE
BUDGET_COMPONENT
FINAID_HOLD
AID_YEAR (FK)
PERSON_UID (FK)
APPLICANT_RESOURCE
AID_YEAR (FK)
PERSON_UID (FK)
RESOURCE_TYPE
RESOURCE_NUMBER
NEED_ANALYSIS_DEMOGRAPHIC
AID_YEAR (FK)
INTERFACE_TAPE_CODE
APPLICATION_NUMBER
PERSON_UID (FK)
NON_YEAR_USER_DEFINED_FIELDS
PERSON_UID (FK)
LOAN_APPLICATION
LOAN_APPLICATION_NUMBER
AID_YEAR (FK)
PERSON_UID (FK)
APPLICANT_NEED
AID_YEAR (FK)
PERSON_UID (FK)
FINAID_COMMENTS
AID_YEAR (FK)
PERSON_UID (FK)
TRACKING_REQUIREMENT_SLOT
AID_YEAR (FK)
PERSON_UID (FK)
PROFILE_CODE
REQUIREMENT_RULE

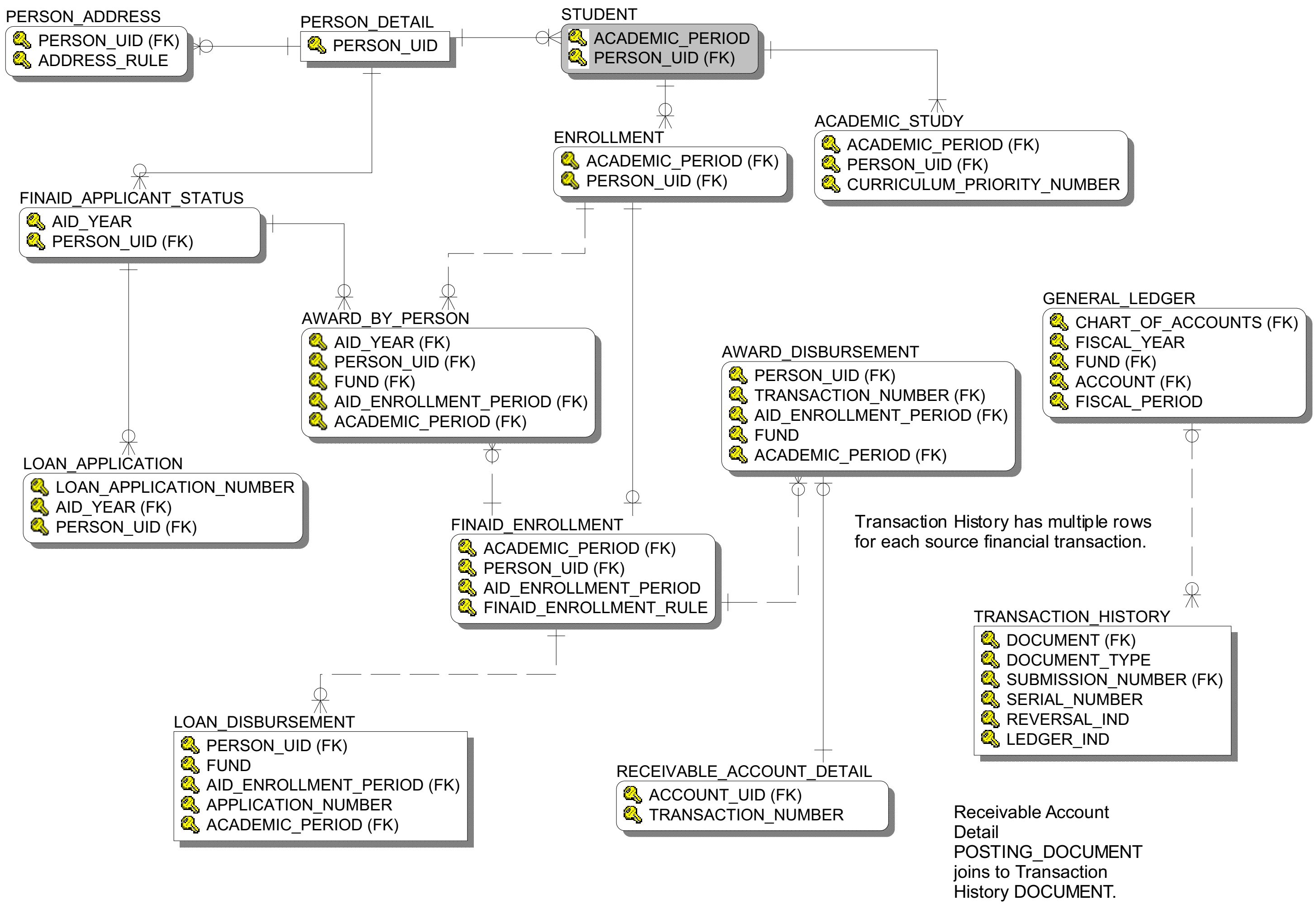
Financial Aid Award and Disbursement


VETERAN_CERTIFICATION
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
TELEPHONE_CURRENT
ENTITY_UID (FK)
PHONE_TYPE
PHONE_SEQ_NUMBER
GOVERNMENT_FINANCIAL_AID
AID_YEAR (FK)
FUND (FK)
FUND_SOURCE_TYPE (FK)
FINANCIAL_AID_TYPE (FK)
PERSON_UID (FK)
AID_ENROLLMENT_PERIOD (FK)
ACADEMIC_PERIOD (FK)
DESIGNATION_FINAID_FUND
DESIGNATION (FK)
FINANCIAL_AID_FUND
PERSON_DETAIL
PERSON_UID
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
FINAID_FUND
AID_YEAR
FUND
Government Financial Aid contains all the information that is required for government reporting. It does not need to join with other reporting
LOAN_AGGREGATES
AID_YEAR (FK)
PERSON_UID (FK)
INTERFACE_TAPE_CODE
SEQUENCE_NUMBER
AWARD_BY_FUND
AID_YEAR (FK)
FUND (FK)
STUDENT
ACADEMIC_PERIOD
PERSON_UID (FK)
FINAID_APPLICANT_STATUS
AID_YEAR
PERSON_UID (FK)
AWARD_BY_PERSON
AID_YEAR (FK)
PERSON_UID (FK)
FUND (FK)
AID_ENROLLMENT_PERIOD (FK)
ACADEMIC_PERIOD (FK)
GPA_BY_LEVEL
PERSON_UID (FK)
ACADEMIC_STUDY_VALUE
AWARD_BY_AID_YEAR
AID_YEAR (FK)
FUND (FK)
PERSON_UID
ACADEMIC_STUDY
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
CURRICULUM_PRIORITY_NUMBER
ENROLLMENT
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
AWARD_DISBURSEMENT
PERSON_UID (FK)
TRANSACTION_NUMBER (FK)
AID_ENROLLMENT_PERIOD (FK)
FUND
ACADEMIC_PERIOD (FK)
FINAID_ENROLLMENT
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
AID_ENROLLMENT_PERIOD
FINAID_ENROLLMENT_RULE
ENROLLMENT_WITHDRAWAL
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
LOAN_DISBURSEMENT
PERSON_UID (FK)
FUND
AID_ENROLLMENT_PERIOD (FK)
APPLICATION_NUMBER
ACADEMIC_PERIOD (FK)
GPA_BY_TERM
ACADEMIC_PERIOD (FK)
ACADEMIC_STUDY_VALUE
GPA_TYPE
PERSON_UID (FK)
Transaction History has multiple rows for each source financial transaction.
Receivable Account Detail POSTING_DOCUMENT joins with DOCUMENT in Transaction History.
TRANSACTION_HISTORY
DOCUMENT (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND
RECEIVABLE_ACCOUNT_DETAIL
ACCOUNT_UID (FK)
TRANSACTION_NUMBER
GENERAL_LEDGER
CHART_OF_ACCOUNTS (FK)
FISCAL_YEAR
FUND (FK)
ACCOUNT (FK)
FISCAL_PERIOD

Financial Aid Fund

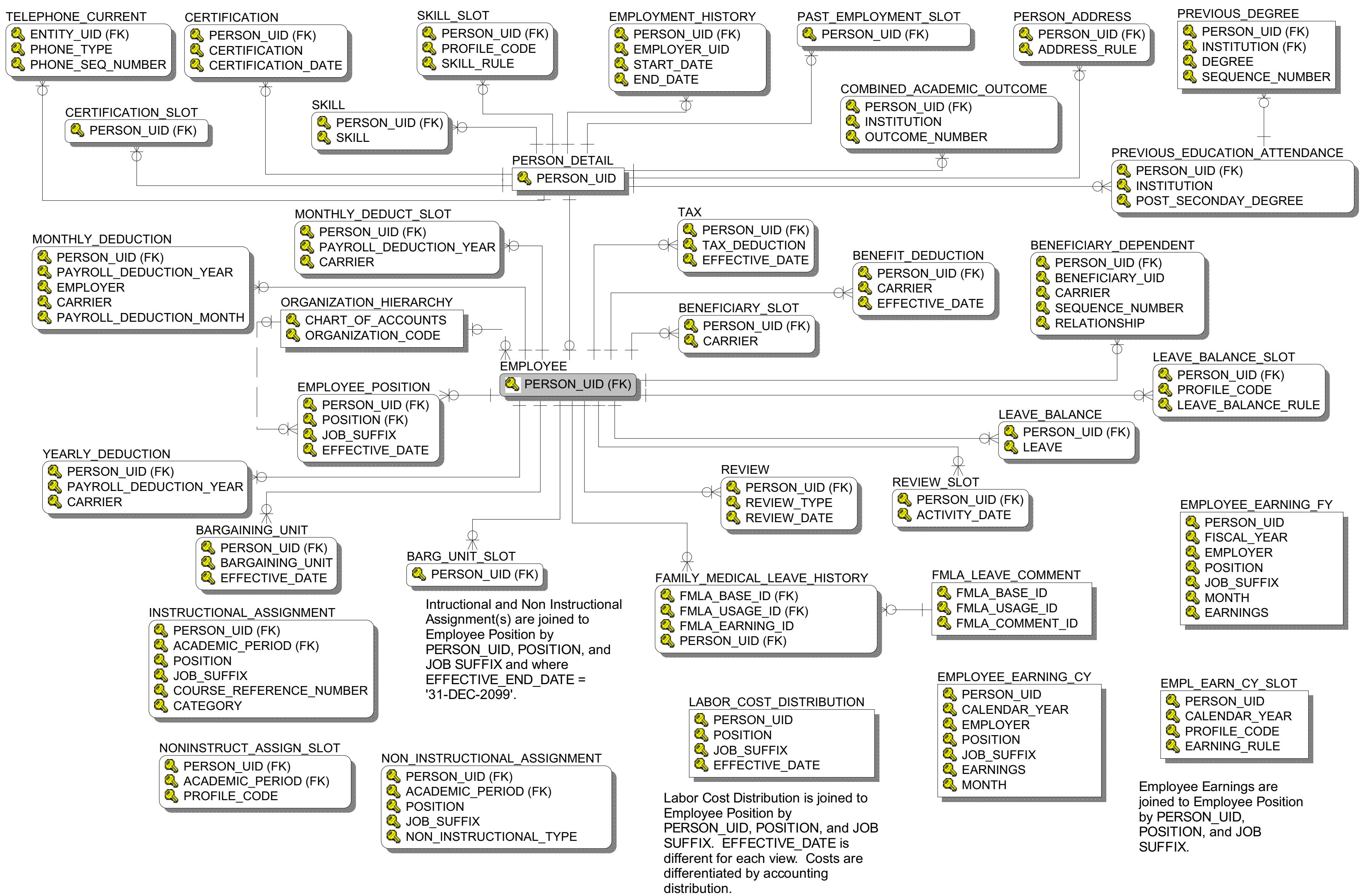


Loan Disbursement

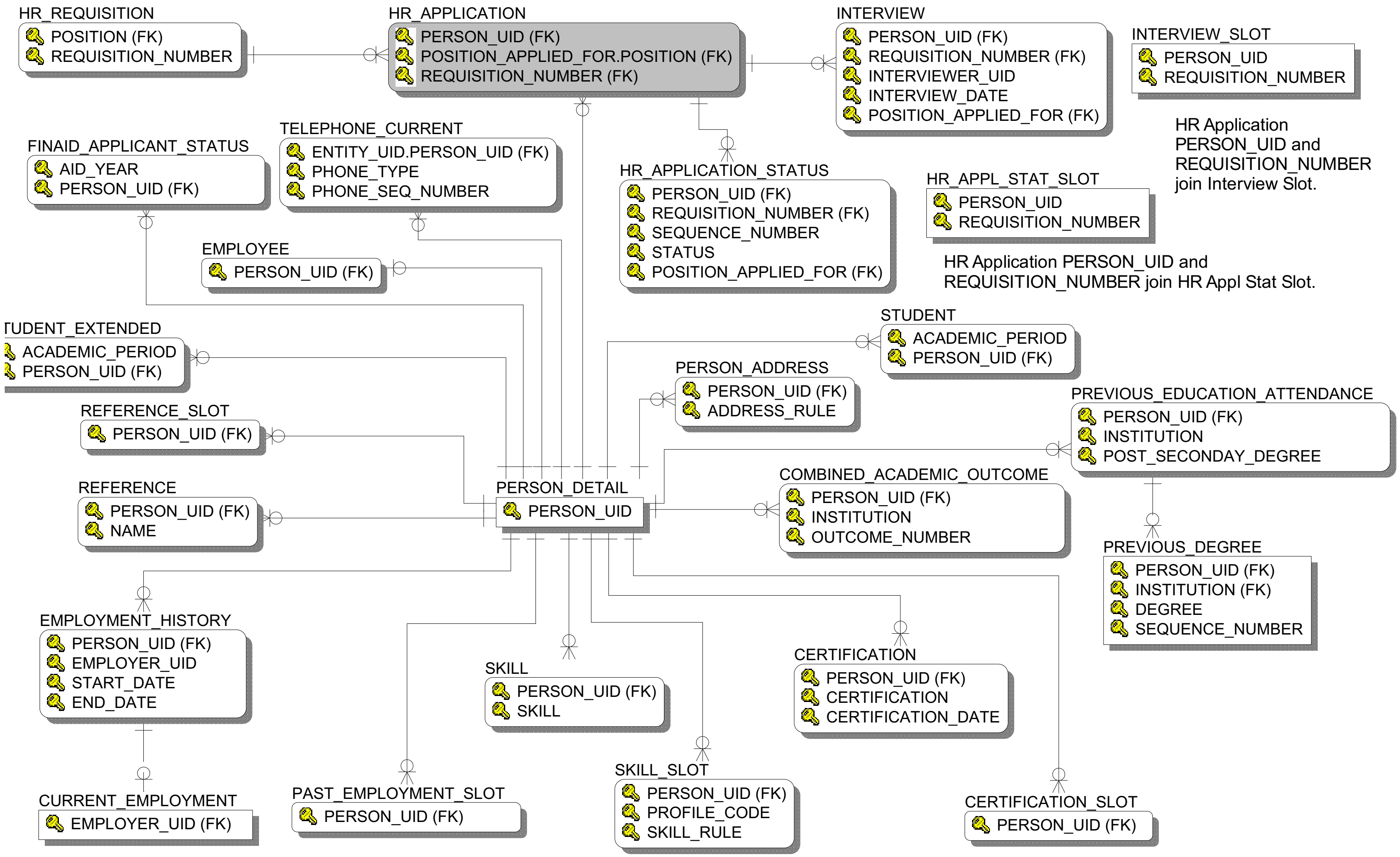


Human Resources

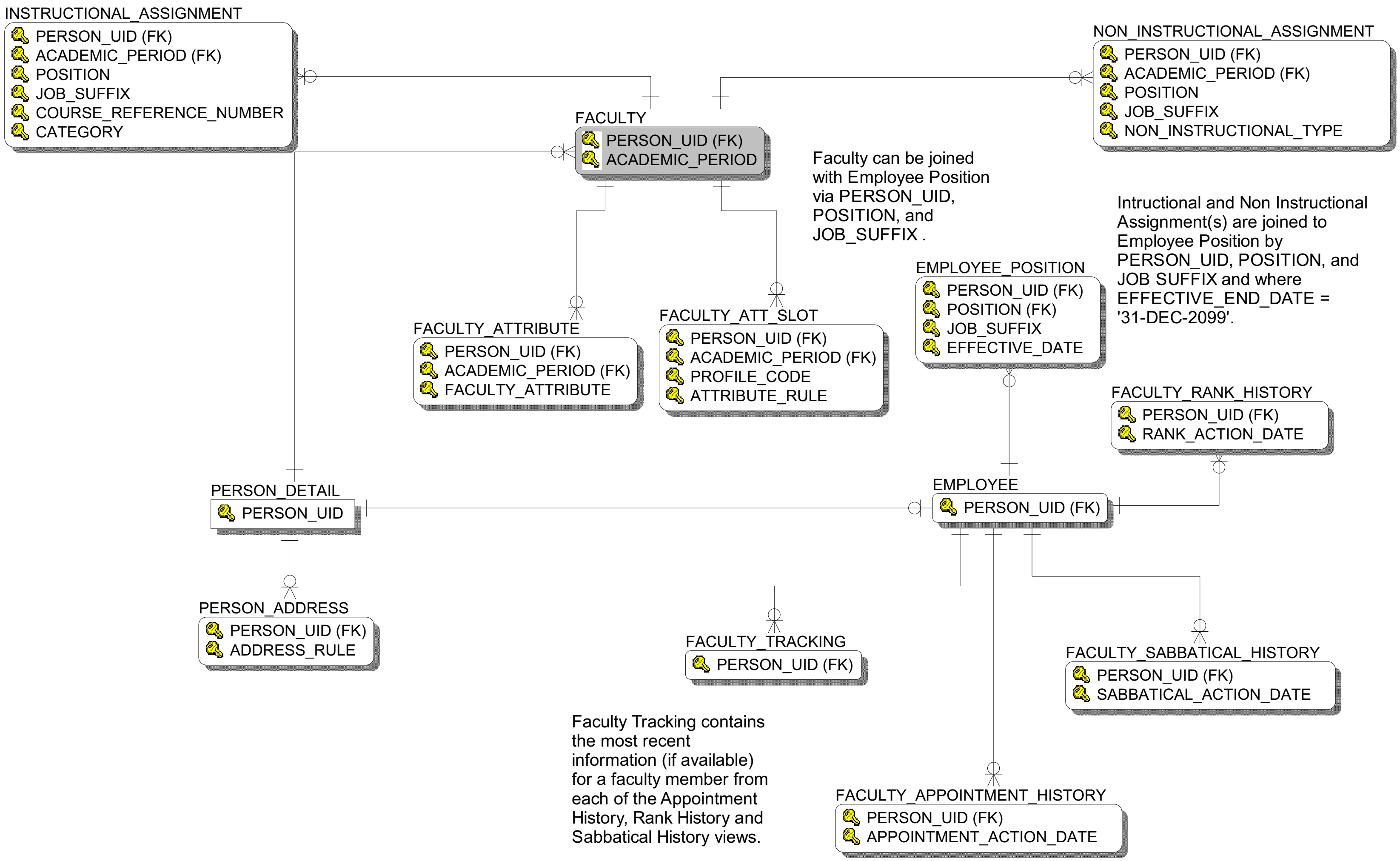
Employee


TELEPHONE_CURRENT
ENTITY_UID (FK)
PHONE_TYPE
PHONE_SEQ_NUMBER
CERTIFICATION
PERSON_UID (FK)
CERTIFICATION
CERTIFICATION_DATE
SKILL_SLOT
PERSON_UID (FK)
PROFILE_CODE
SKILL_RULE
EMPLOYMENT_HISTORY
PERSON_UID (FK)
EMPLOYER_UID
START_DATE
END_DATE
PAST_EMPLOYMENT_SLOT
PERSON_UID (FK)
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
PREVIOUS_DEGREE
PERSON_UID (FK)
INSTITUTION (FK)
DEGREE
SEQUENCE_NUMBER
CERTIFICATION_SLOT
PERSON_UID (FK)
SKILL
PERSON_UID (FK)
SKILL
COMBINED_ACADEMIC_OUTCOME
PERSON_UID (FK)
INSTITUTION
OUTCOME_NUMBER
PERSON_DETAIL
PERSON_UID
PREVIOUS_EDUCATION_ATTENDANCE
PERSON_UID (FK)
INSTITUTION
POST_SECONDAY_DEGREE
MONTHLY_DEDUCT_SLOT
PERSON_UID (FK)
PAYROLL_DEDUCTION_YEAR
CARRIER
TAX
PERSON_UID (FK)
TAX_DEDUCTION
EFFECTIVE_DATE
MONTHLY_DEDUCTION
PERSON_UID (FK)
PAYROLL_DEDUCTION_YEAR
EMPLOYER
CARRIER
PAYROLL_DEDUCTION_MONTH
BENEFIT_DEDUCTION
PERSON_UID (FK)
CARRIER
EFFECTIVE_DATE
BENEFICIARY_DEPENDENT
PERSON_UID (FK)
BENEFICIARY_UID
CARRIER
SEQUENCE_NUMBER
RELATIONSHIP
ORGANIZATION_HIERARCHY
CHART_OF_ACCOUNTS
ORGANIZATION_CODE
BENEFICIARY_SLOT
PERSON_UID (FK)
CARRIER
EMPLOYEE
PERSON_UID (FK)
LEAVE_BALANCE_SLOT
PERSON_UID (FK)
PROFILE_CODE
LEAVE_BALANCE_RULE
EMPLOYEE_POSITION
PERSON_UID (FK)
POSITION (FK)
JOB_SUFFIX
EFFECTIVE_DATE
LEAVE_BALANCE
PERSON_UID (FK)
LEAVE
YEARLY_DEDUCTION
PERSON_UID (FK)
PAYROLL_DEDUCTION_YEAR
CARRIER
REVIEW
PERSON_UID (FK)
REVIEW_TYPE
REVIEW_DATE
REVIEW_SLOT
PERSON_UID (FK)
ACTIVITY_DATE
EMPLOYEE_EARNING_FY
PERSON_UID
FISCAL_YEAR
EMPLOYER
POSITION
JOB_SUFFIX
MONTH
EARNINGS
BARGAINING_UNIT
PERSON_UID (FK)
BARGAINING_UNIT
EFFECTIVE_DATE
BARG_UNIT_SLOT
PERSON_UID (FK)
FAMILY_MEDICAL_LEAVE_HISTORY
FMLA_BASE_ID (FK)
FMLA_USAGE_ID (FK)
FMLA_EARNING_ID
PERSON_UID (FK)
FMLA_LEAVE_COMMENT
FMLA_BASE_ID
FMLA_USAGE_ID
FMLA_COMMENT_ID
Intructional and Non Instructional Assignment(s) are joined to Employee Position by PERSON_UID, POSITION, and JOB SUFFIX and where EFFECTIVE_END_DATE = '31-DEC-2099'.
INSTRUCTIONAL_ASSIGNMENT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
POSITION
JOB_SUFFIX
COURSE_REFERENCE_NUMBER
CATEGORY
EMPLOYEE_EARNING_CY
PERSON_UID
CALENDAR_YEAR
EMPLOYER
POSITION
JOB_SUFFIX
EARNINGS
MONTH
EMPL_EARN_CY_SLOT
PERSON_UID
CALENDAR_YEAR
PROFILE_CODE
EARNING_RULE
LABOR_COST_DISTRIBUTION
PERSON_UID
POSITION
JOB_SUFFIX
EFFECTIVE_DATE
NONINSTRUCT_ASSIGN_SLOT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
PROFILE_CODE
NON_INSTRUCTIONAL_ASSIGNMENT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
POSITION
JOB_SUFFIX
NON_INSTRUCTIONAL_TYPE
Employee Earnings are joined to Employee Position by PERSON_UID, POSITION, and JOB SUFFIX.
Labor Cost Distribution is joined to Employee Position by PERSON_UID, POSITION, and JOB SUFFIX. EFFECTIVE_DATE is different for each view. Costs are differentiated by accounting distribution.

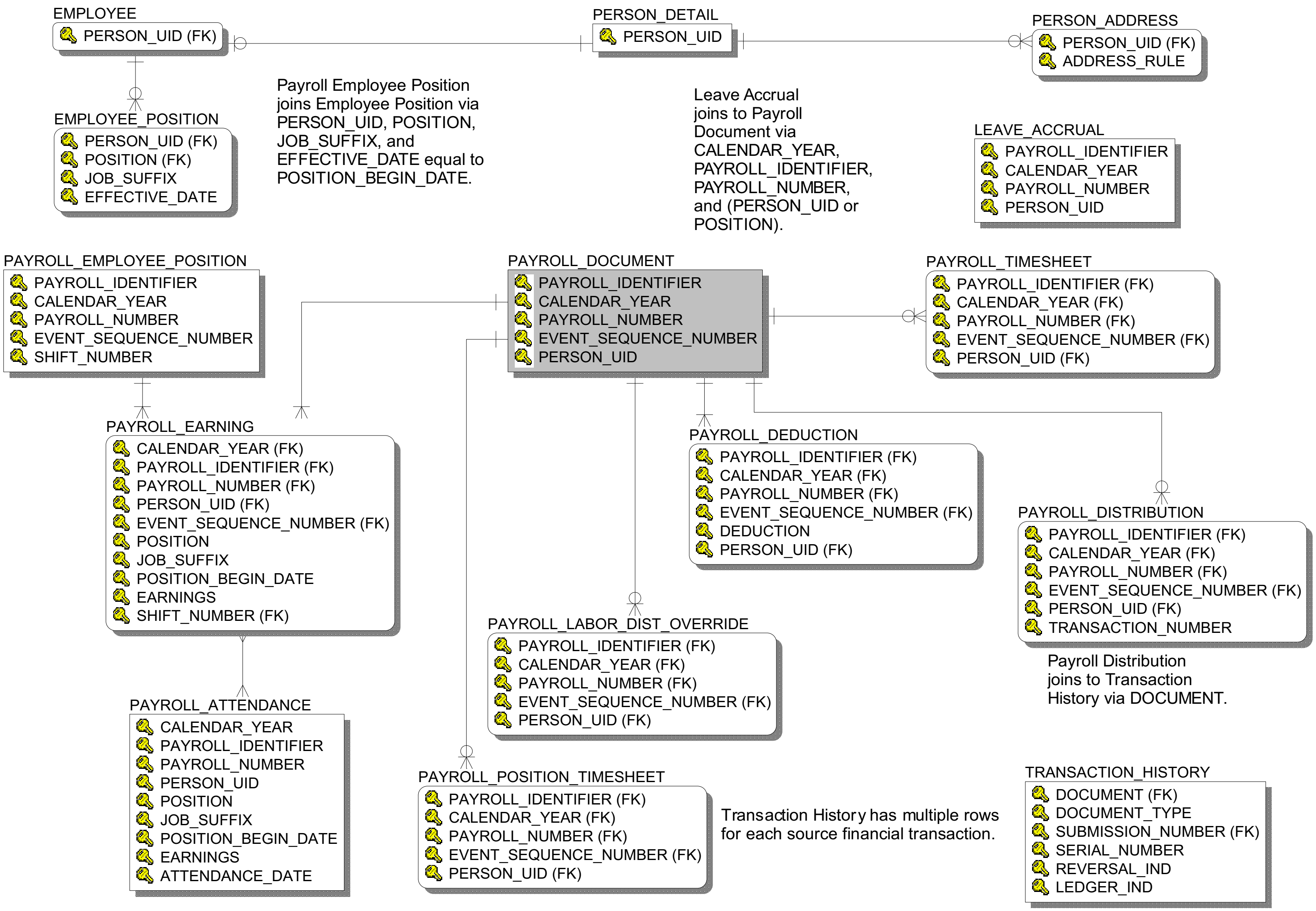
Human Resource Application



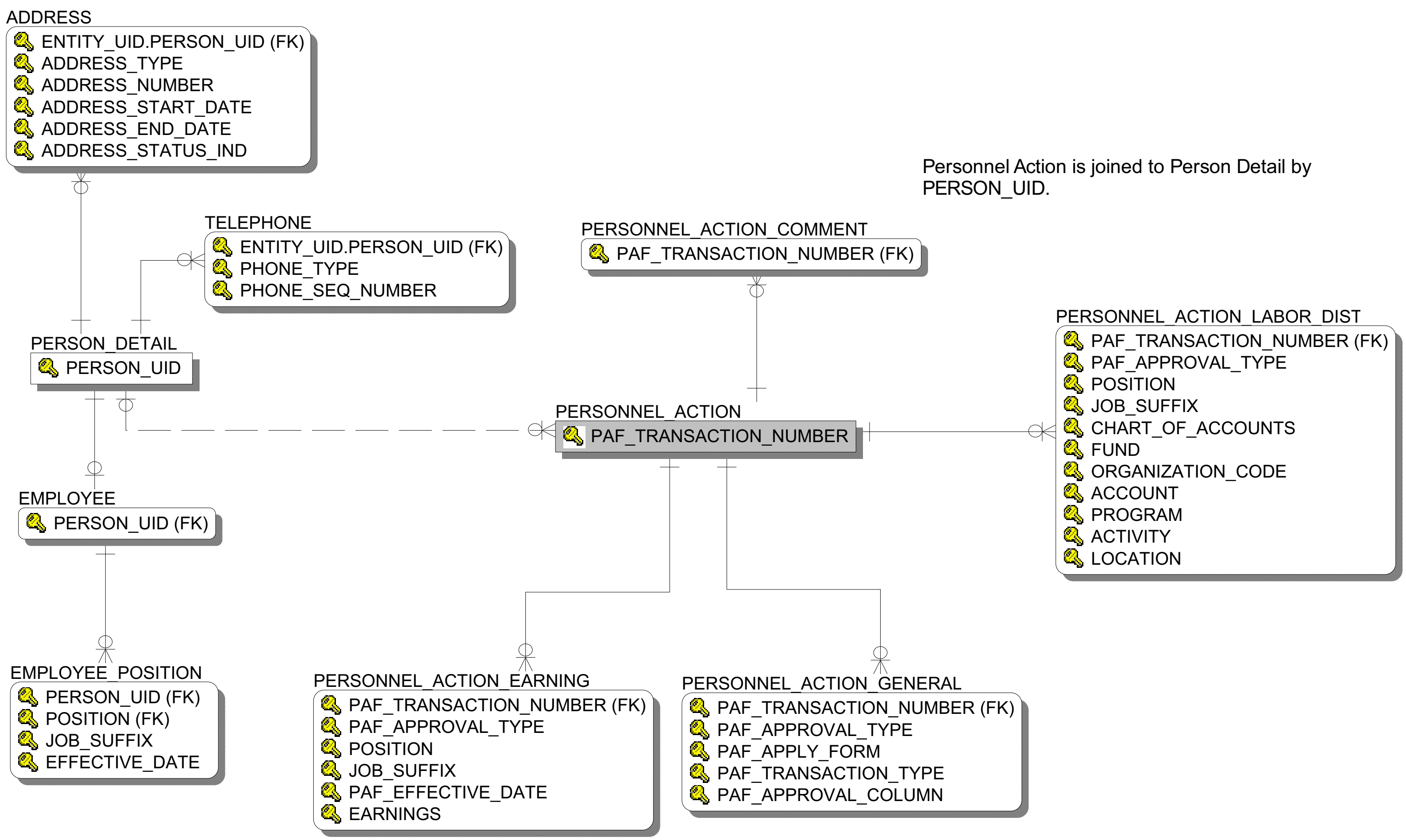
Human Resource Faculty



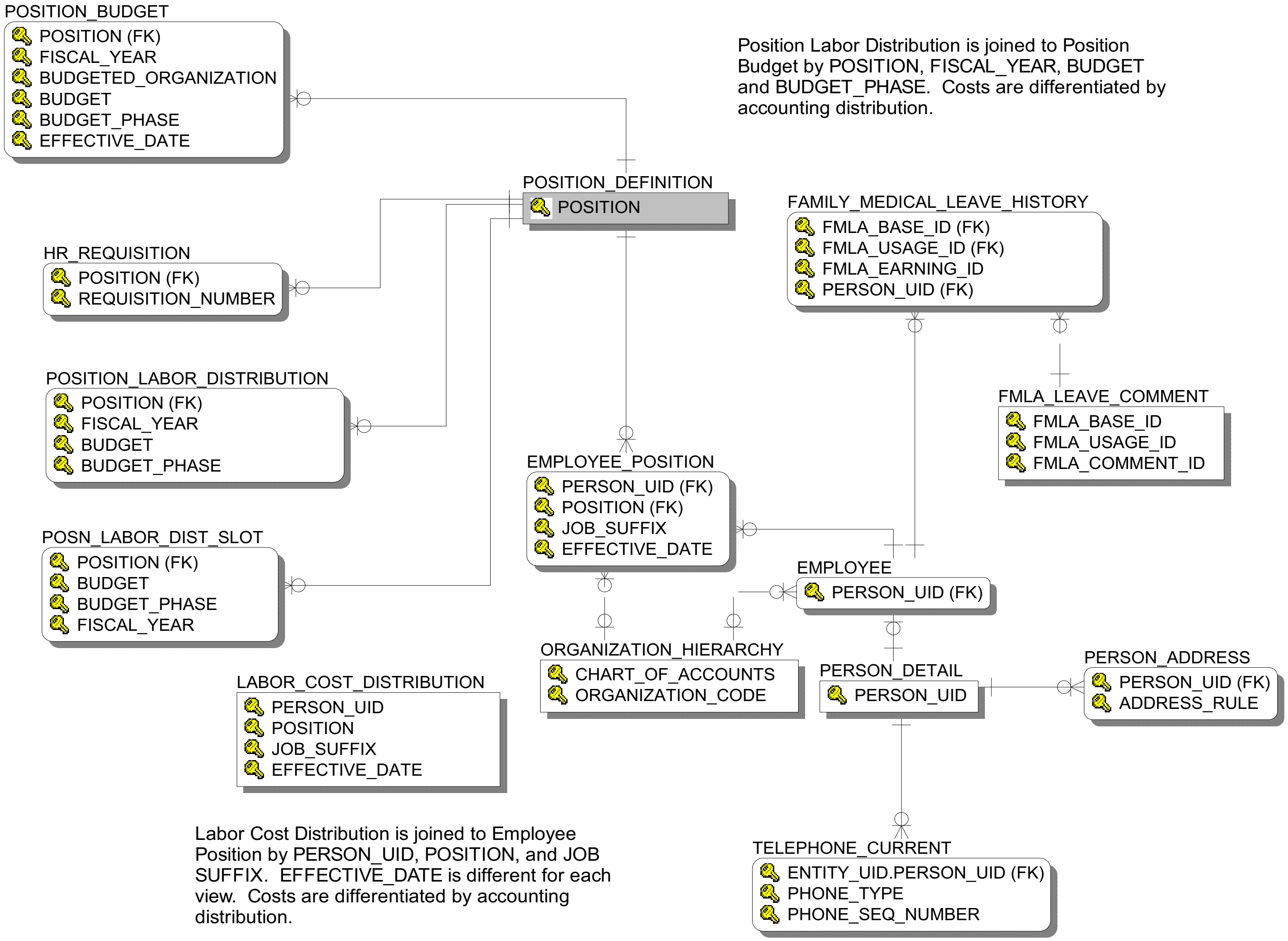
Payroll


EMPLOYEE
PERSON_UID (FK)
PERSON_DETAIL
PERSON_UID
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
EMPLOYEE_POSITION
PERSON_UID (FK)
POSITION (FK)
JOB_SUFFIX
EFFECTIVE_DATE
Payroll Employee Position joins Employee Position via PERSON_UID, POSITION, JOB_SUFFIX, and EFFECTIVE_DATE equal to POSITION_BEGIN_DATE.
Leave Accrual joins to Payroll Document via CALENDAR_YEAR, PAYROLL_IDENTIFIER, PAYROLL_NUMBER, and (PERSON_UID or POSITION).
LEAVE_ACCRUAL
PAYROLL_IDENTIFIER
CALENDAR_YEAR
PAYROLL_NUMBER
PERSON_UID
PAYROLL_EMPLOYEE_POSITION
PAYROLL_IDENTIFIER
CALENDAR_YEAR
PAYROLL_NUMBER
EVENT_SEQUENCE_NUMBER
SHIFT_NUMBER
PAYROLL_DOCUMENT
PAYROLL_IDENTIFIER
CALENDAR_YEAR
PAYROLL_NUMBER
EVENT_SEQUENCE_NUMBER
PERSON_UID
PAYROLL_TIMESHEET
PAYROLL_IDENTIFIER (FK)
CALENDAR_YEAR (FK)
PAYROLL_NUMBER (FK)
EVENT_SEQUENCE_NUMBER (FK)
PERSON_UID (FK)
PAYROLL_EARNING
CALENDAR_YEAR (FK)
PAYROLL_IDENTIFIER (FK)
PAYROLL_NUMBER (FK)
PERSON_UID (FK)
EVENT_SEQUENCE_NUMBER (FK)
POSITION
JOB_SUFFIX
POSITION_BEGIN_DATE
EARNINGS
SHIFT_NUMBER (FK)
PAYROLL_DEDUCTION
PAYROLL_IDENTIFIER (FK)
CALENDAR_YEAR (FK)
PAYROLL_NUMBER (FK)
EVENT_SEQUENCE_NUMBER (FK)
DEDUCTION
PERSON_UID (FK)
PAYROLL_DISTRIBUTION
PAYROLL_IDENTIFIER (FK)
CALENDAR_YEAR (FK)
PAYROLL_NUMBER (FK)
EVENT_SEQUENCE_NUMBER (FK)
PERSON_UID (FK)
TRANSACTION_NUMBER
PAYROLL_LABOR_DIST_OVERRIDE
PAYROLL_IDENTIFIER (FK)
CALENDAR_YEAR (FK)
PAYROLL_NUMBER (FK)
EVENT_SEQUENCE_NUMBER (FK)
PERSON_UID (FK)
Payroll Distribution joins to Transaction History via DOCUMENT.
PAYROLL_ATTENDANCE
CALENDAR_YEAR
PAYROLL_IDENTIFIER
PAYROLL_NUMBER
PERSON_UID
POSITION
JOB_SUFFIX
POSITION_BEGIN_DATE
EARNINGS
ATTENDANCE_DATE
PAYROLL_POSITION_TIMESHEET
PAYROLL_IDENTIFIER (FK)
CALENDAR_YEAR (FK)
PAYROLL_NUMBER (FK)
EVENT_SEQUENCE_NUMBER (FK)
PERSON_UID (FK)
Transaction History has multiple rows for each source financial transaction.
TRANSACTION_HISTORY
DOCUMENT (FK)
DOCUMENT_TYPE
SUBMISSION_NUMBER (FK)
SERIAL_NUMBER
REVERSAL_IND
LEDGER_IND

Personnel Action Audit



Position

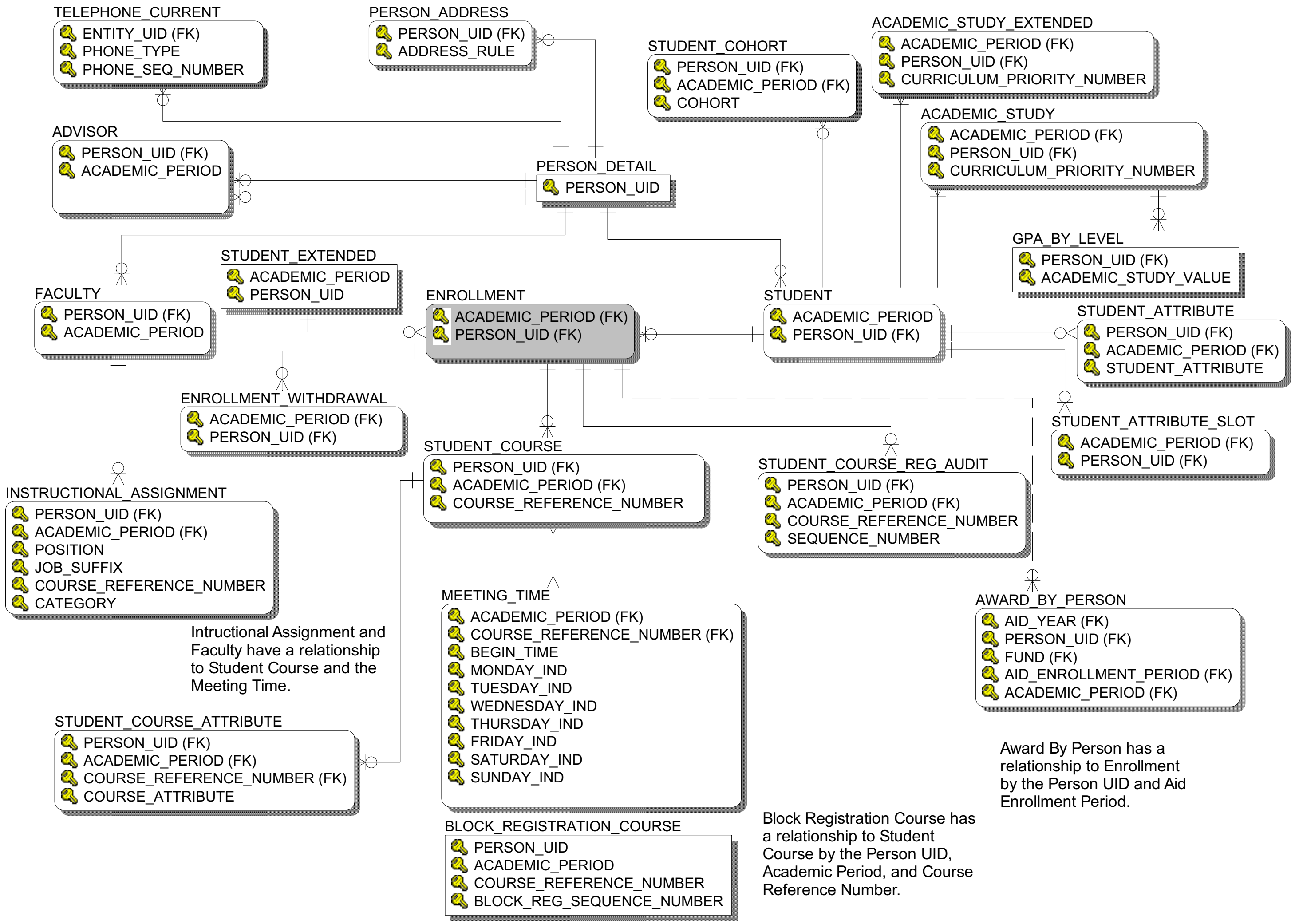


Position Labor Distribution is joined to Position Budget by POSITION, FISCAL_YEAR, BUDGET and BUDGET_PHASE. Costs are differentiated by accounting distribution.

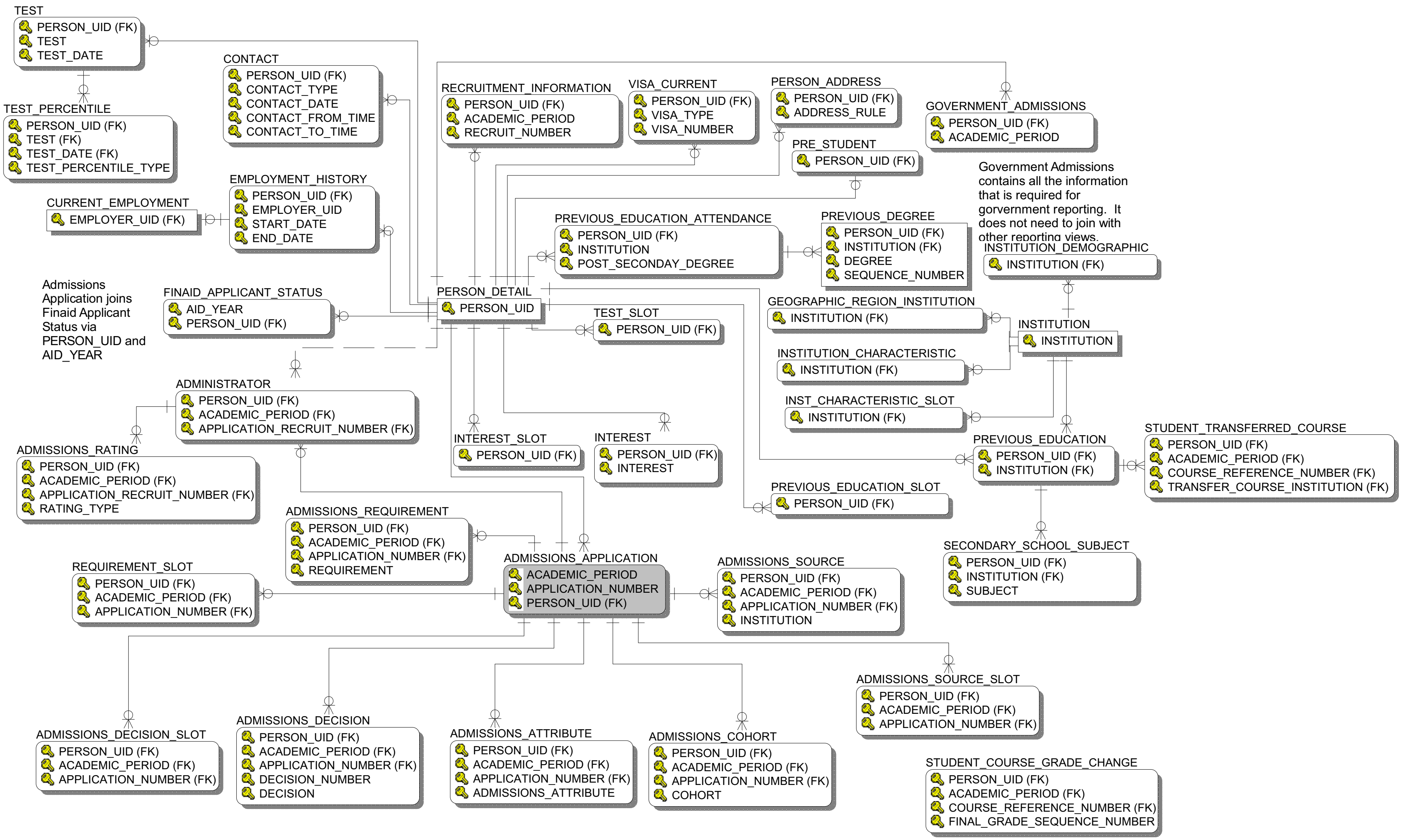
Labor Cost Distribution is joined to Employee Position by PERSON_UID, POSITION, and JOB SUFFIX. EFFECTIVE_DATE is different for each view. Costs are differentiated by accounting distribution.

Student

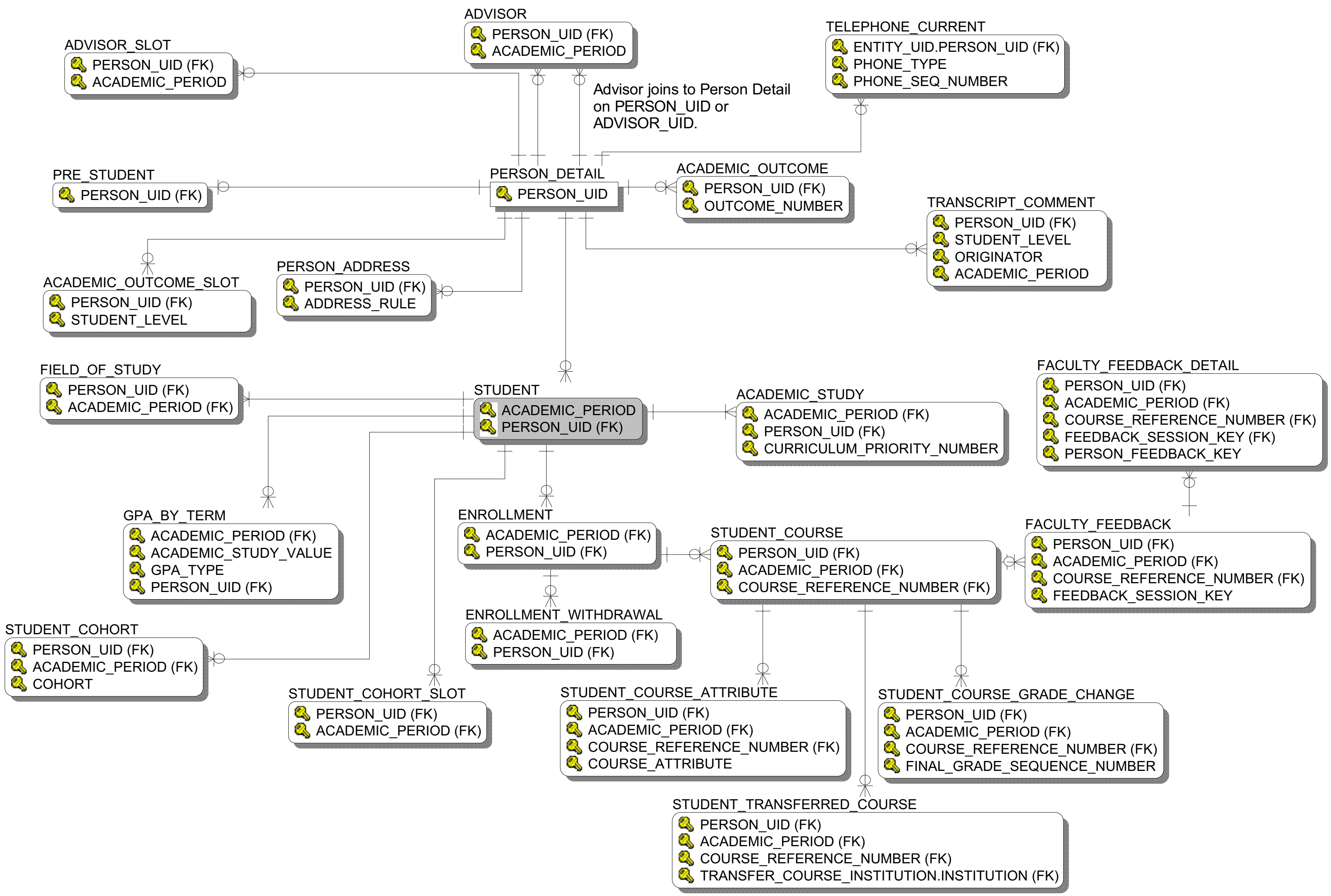
Active Registration


TELEPHONE_CURRENT
ENTITY_UID (FK)
PHONE_TYPE
PHONE_SEQ_NUMBER
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
STUDENT_COHORT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COHORT
ACADEMIC_STUDY_EXTENDED
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
CURRICULUM_PRIORITY_NUMBER
ADVISOR
PERSON_UID (FK)
ACADEMIC_PERIOD
PERSON_DETAIL
PERSON_UID
ACADEMIC_STUDY
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
CURRICULUM_PRIORITY_NUMBER
GPA_BY_LEVEL
PERSON_UID (FK)
ACADEMIC_STUDY_VALUE
STUDENT_EXTENDED
ACADEMIC_PERIOD
PERSON_UID
FACULTY
PERSON_UID (FK)
ACADEMIC_PERIOD
ENROLLMENT
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT
ACADEMIC_PERIOD
PERSON_UID (FK)
STUDENT_ATTRIBUTE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
STUDENT_ATTRIBUTE
ENROLLMENT_WITHDRAWAL
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT_ATTRIBUTE_SLOT
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT_COURSE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER
STUDENT_COURSE_REG_AUDIT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER
SEQUENCE_NUMBER
INSTRUCTIONAL_ASSIGNMENT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
POSITION
JOB_SUFFIX
COURSE_REFERENCE_NUMBER
CATEGORY
Intructional Assignment and Faculty have a relationship to Student Course and the Meeting Time.
MEETING_TIME
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
BEGIN_TIME
MONDAY_IND
TUESDAY_IND
WEDNESDAY_IND
THURSDAY_IND
FRIDAY_IND
SATURDAY_IND
SUNDAY_IND
AWARD_BY_PERSON
AID_YEAR (FK)
PERSON_UID (FK)
FUND (FK)
AID_ENROLLMENT_PERIOD (FK)
ACADEMIC_PERIOD (FK)
STUDENT_COURSE_ATTRIBUTE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
COURSE_ATTRIBUTE
Award By Person has a relationship to Enrollment by the Person UID and Aid Enrollment Period.
BLOCK_REGISTRATION_COURSE
PERSON_UID
ACADEMIC_PERIOD
COURSE_REFERENCE_NUMBER
BLOCK_REG_SEQUENCE_NUMBER
Block Registration Course has a relationship to Student Course by the Person UID, Academic Period, and Course Reference Number.

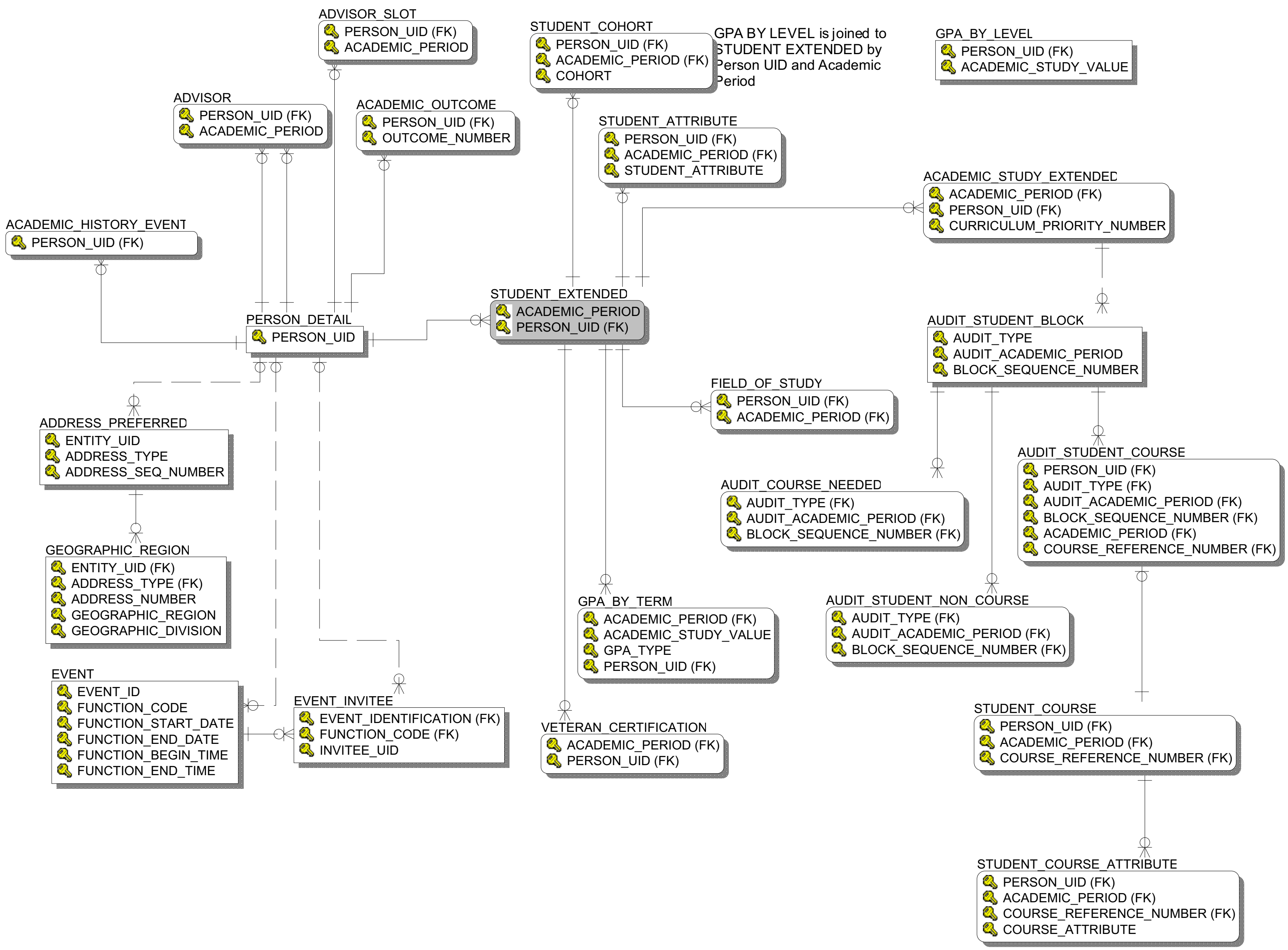
Admissions Application



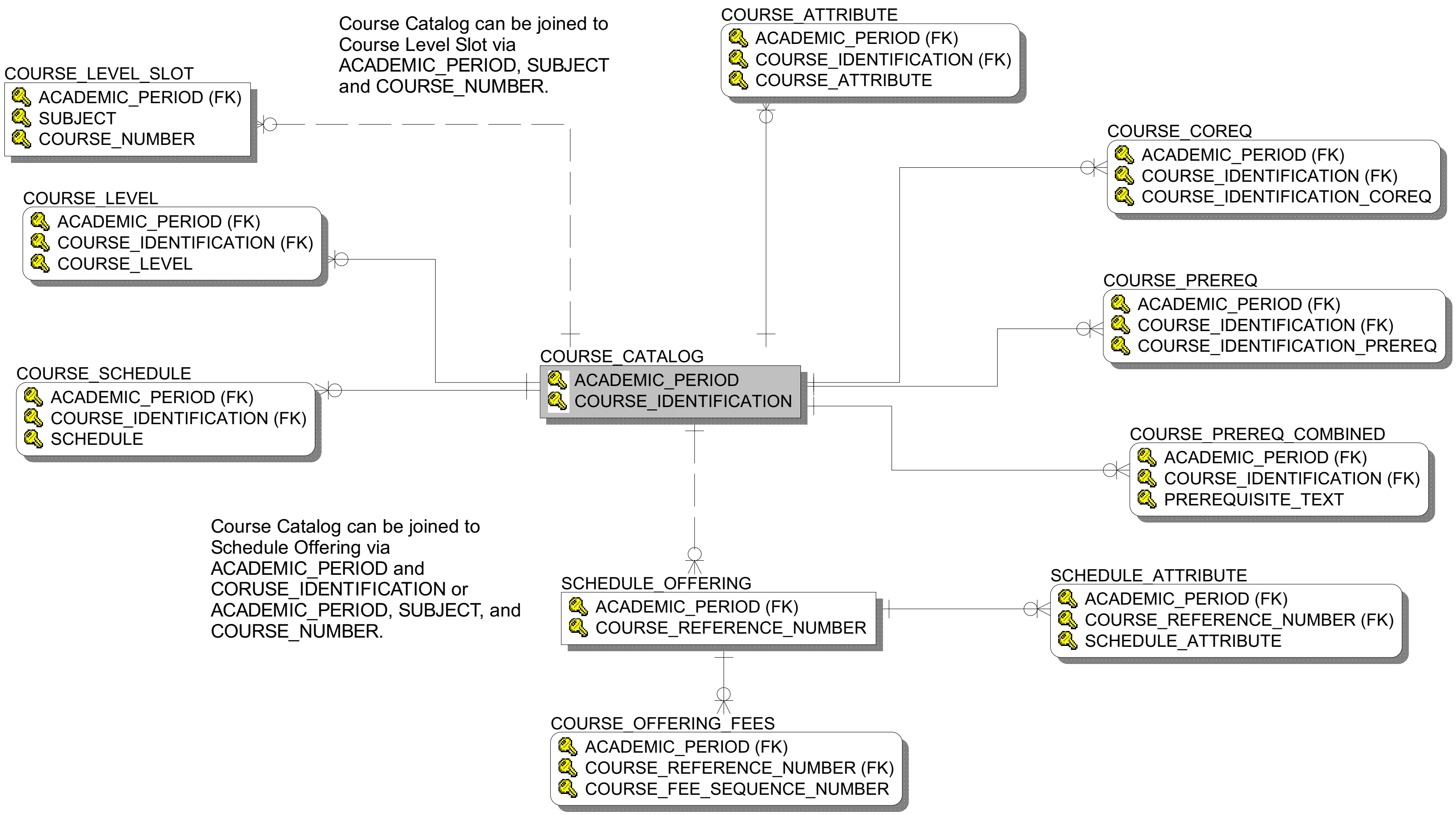
Advisor Student List


ADVISOR
PERSON_UID (FK)
ACADEMIC_PERIOD
ADVISOR_SLOT
PERSON_UID (FK)
ACADEMIC_PERIOD
TELEPHONE_CURRENT
ENTITY_UID.PERSON_UID (FK)
PHONE_TYPE
PHONE_SEQ_NUMBER
Advisor joins to Person Detail on PERSON_UID or ADVISOR_UID.
PRE_STUDENT
PERSON_UID (FK)
PERSON_DETAIL
PERSON_UID
ACADEMIC_OUTCOME
PERSON_UID (FK)
OUTCOME_NUMBER
TRANSCRIPT_COMMENT
PERSON_UID (FK)
STUDENT_LEVEL
ORIGINATOR
ACADEMIC_PERIOD
ACADEMIC_OUTCOME_SLOT
PERSON_UID (FK)
STUDENT_LEVEL
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
FIELD_OF_STUDY
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
STUDENT
ACADEMIC_PERIOD
PERSON_UID (FK)
ACADEMIC_STUDY
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
CURRICULUM_PRIORITY_NUMBER
FACULTY_FEEDBACK_DETAIL
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FEEDBACK_SESSION_KEY (FK)
PERSON_FEEDBACK_KEY
GPA_BY_TERM
ACADEMIC_PERIOD (FK)
ACADEMIC_STUDY_VALUE
GPA_TYPE
PERSON_UID (FK)
ENROLLMENT
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT_COURSE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FACULTY_FEEDBACK
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FEEDBACK_SESSION_KEY
ENROLLMENT_WITHDRAWAL
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT_COHORT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COHORT
STUDENT_COHORT_SLOT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
STUDENT_COURSE_ATTRIBUTE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
COURSE_ATTRIBUTE
STUDENT_COURSE_GRADE_CHANGE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FINAL_GRADE_SEQUENCE_NUMBER
STUDENT_TRANSFERRED_COURSE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
TRANSFER_COURSE_INSTITUTION.INSTITUTION (FK)

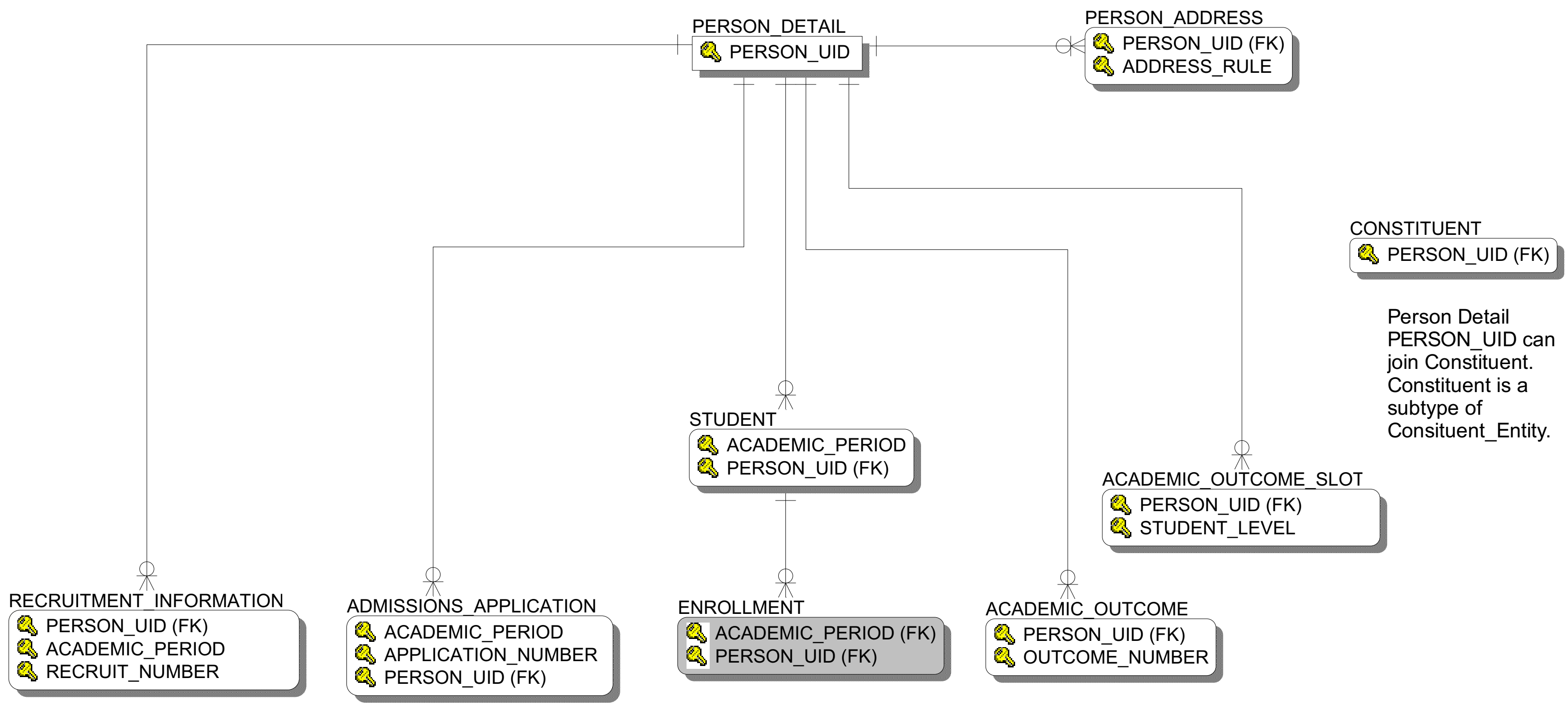
Audit Student


ADVISOR_SLOT
PERSON_UID (FK)
ACADEMIC_PERIOD
STUDENT_COHORT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COHORT
GPA BY LEVEL is joined to STUDENT EXTENDED by Person UID and Academic Period
GPA_BY_LEVEL
PERSON_UID (FK)
ACADEMIC_STUDY_VALUE
ADVISOR
PERSON_UID (FK)
ACADEMIC_PERIOD
ACADEMIC_OUTCOME
PERSON_UID (FK)
OUTCOME_NUMBER
STUDENT_ATTRIBUTE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
STUDENT_ATTRIBUTE
ACADEMIC_STUDY_EXTENDED
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
CURRICULUM_PRIORITY_NUMBER
ACADEMIC_HISTORY_EVENT
PERSON_UID (FK)
STUDENT_EXTENDED
ACADEMIC_PERIOD
PERSON_UID (FK)
PERSON_DETAIL
PERSON_UID
AUDIT_STUDENT_BLOCK
AUDIT_TYPE
AUDIT_ACADEMIC_PERIOD
BLOCK_SEQUENCE_NUMBER
FIELD_OF_STUDY
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
ADDRESS_PREFERRED
ENTITY_UID
ADDRESS_TYPE
ADDRESS_SEQ_NUMBER
AUDIT_STUDENT_COURSE
PERSON_UID (FK)
AUDIT_TYPE (FK)
AUDIT_ACADEMIC_PERIOD (FK)
BLOCK_SEQUENCE_NUMBER (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
AUDIT_COURSE_NEEDED
AUDIT_TYPE (FK)
AUDIT_ACADEMIC_PERIOD (FK)
BLOCK_SEQUENCE_NUMBER (FK)
GEOGRAPHIC_REGION
ENTITY_UID (FK)
ADDRESS_TYPE (FK)
ADDRESS_NUMBER
GEOGRAPHIC_REGION
GEOGRAPHIC_DIVISION
GPA_BY_TERM
ACADEMIC_PERIOD (FK)
ACADEMIC_STUDY_VALUE
GPA_TYPE
PERSON_UID (FK)
AUDIT_STUDENT_NON_COURSE
AUDIT_TYPE (FK)
AUDIT_ACADEMIC_PERIOD (FK)
BLOCK_SEQUENCE_NUMBER (FK)
EVENT
EVENT_ID
FUNCTION_CODE
FUNCTION_START_DATE
FUNCTION_END_DATE
FUNCTION_BEGIN_TIME
FUNCTION_END_TIME
EVENT_INVITEE
EVENT_IDENTIFICATION (FK)
FUNCTION_CODE (FK)
INVITEE_UID
VETERAN_CERTIFICATION
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT_COURSE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
STUDENT_COURSE_ATTRIBUTE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
COURSE_ATTRIBUTE

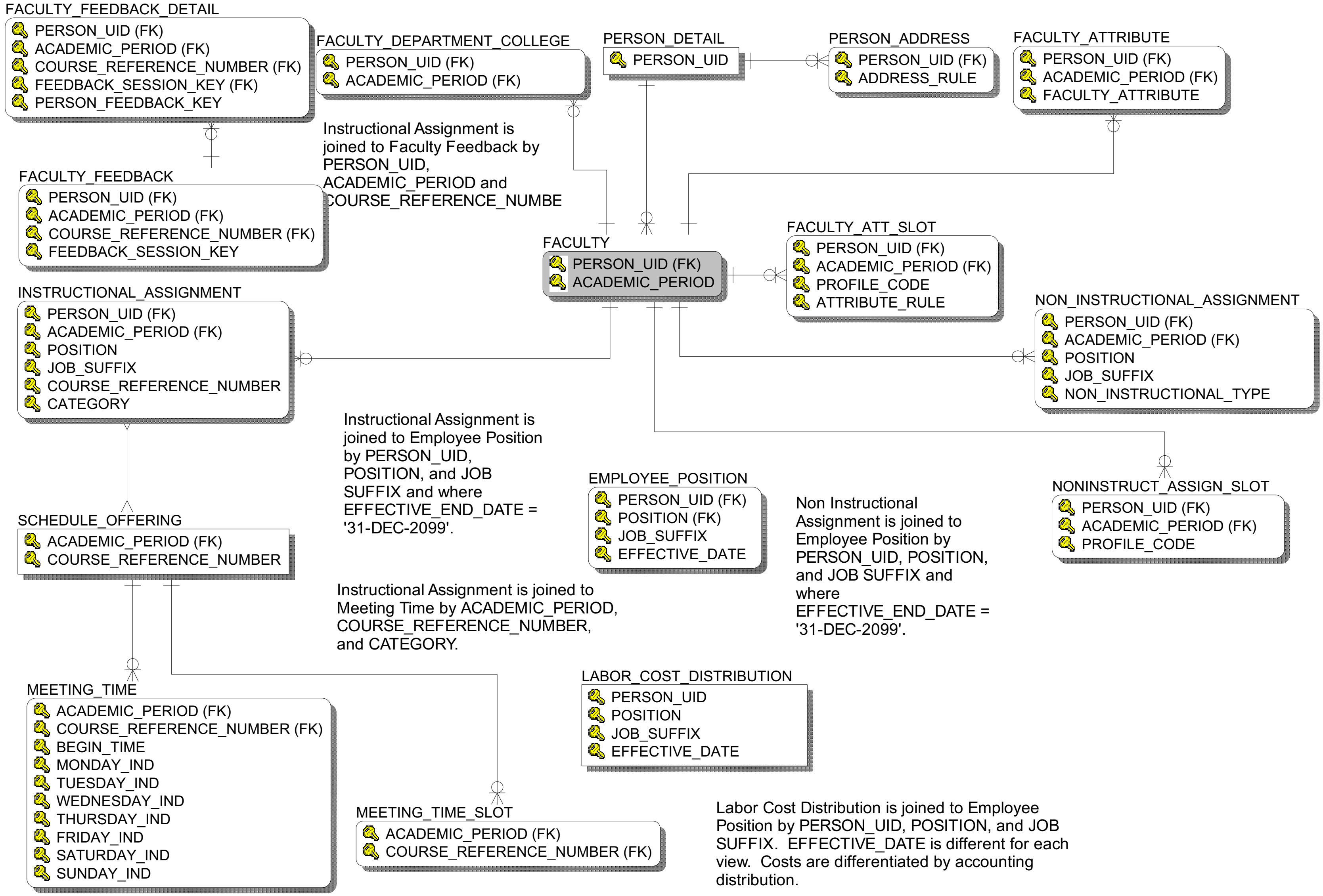
Course Catalog



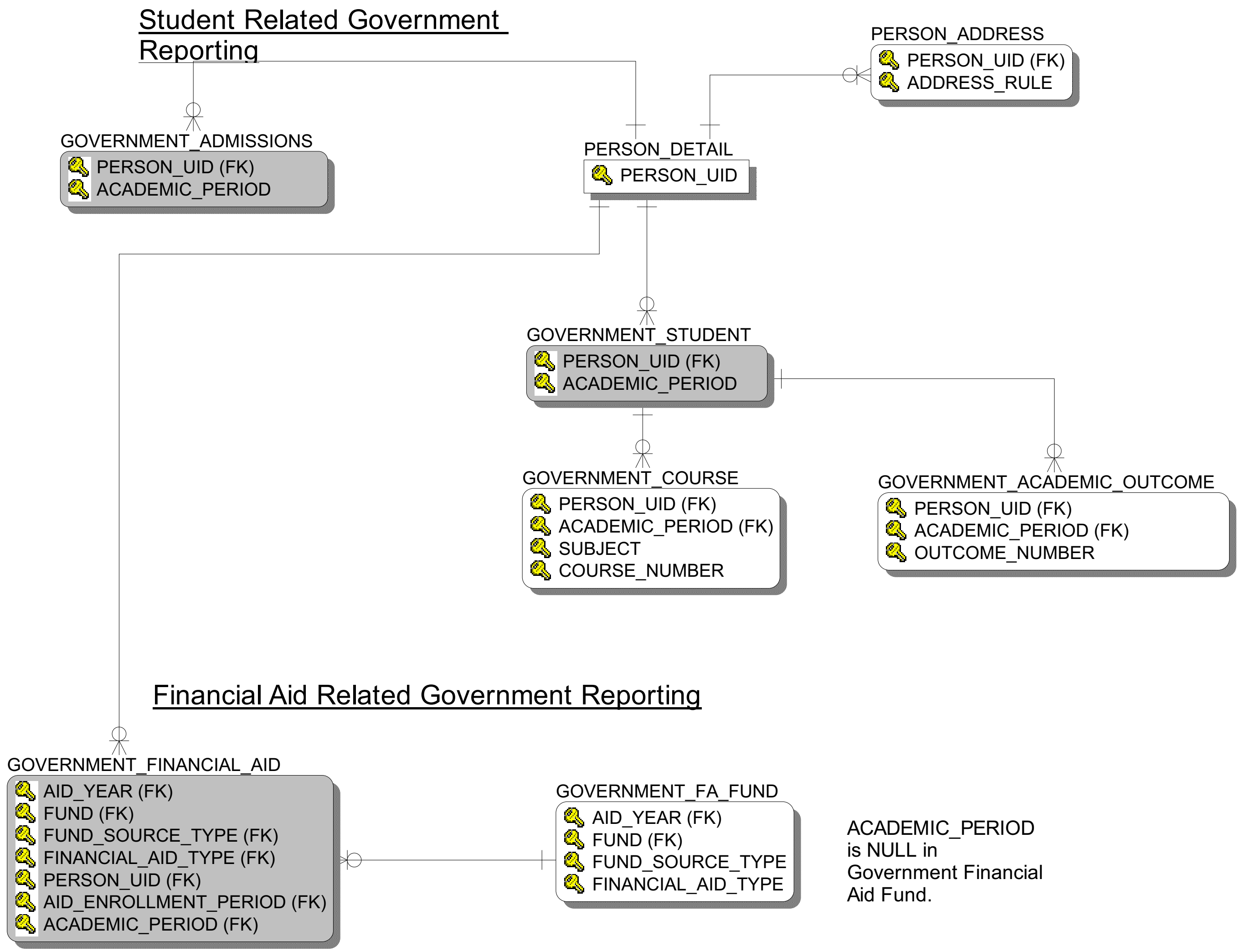
Enrollment Management



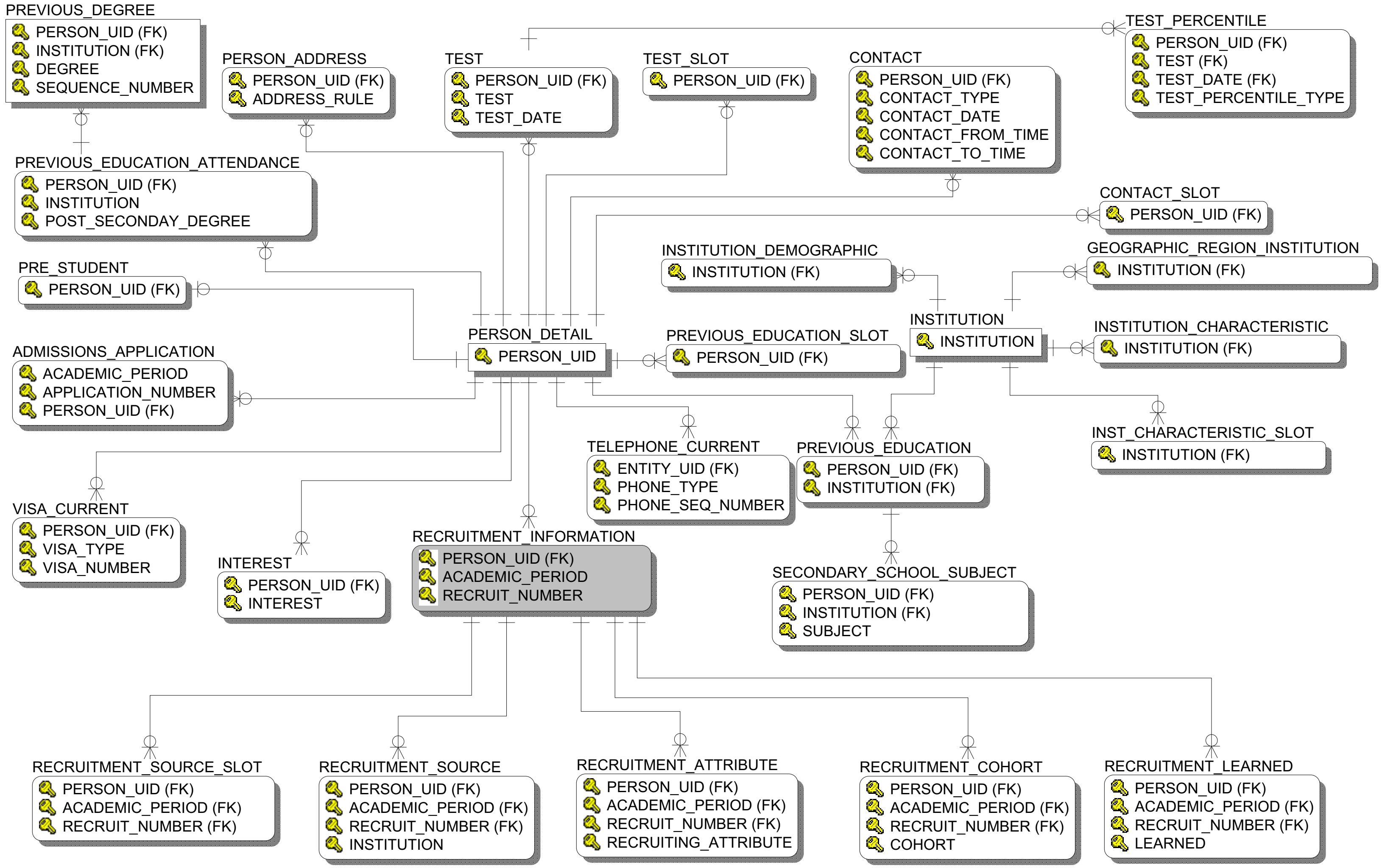
Faculty Assignment


FACULTY_FEEDBACK_DETAIL
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FEEDBACK_SESSION_KEY (FK)
PERSON_FEEDBACK_KEY
FACULTY_DEPARTMENT_COLLEGE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
PERSON_DETAIL
PERSON_UID
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
FACULTY_ATTRIBUTE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
FACULTY_ATTRIBUTE
Instructional Assignment is joined to Faculty Feedback by PERSON_UID, ACADEMIC_PERIOD and COURSE_REFERENCE_NUMBE
FACULTY_FEEDBACK
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FEEDBACK_SESSION_KEY
FACULTY
PERSON_UID (FK)
ACADEMIC_PERIOD
FACULTY_ATT_SLOT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
PROFILE_CODE
ATTRIBUTE_RULE
INSTRUCTIONAL_ASSIGNMENT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
POSITION
JOB_SUFFIX
COURSE_REFERENCE_NUMBER
CATEGORY
NON_INSTRUCTIONAL_ASSIGNMENT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
POSITION
JOB_SUFFIX
NON_INSTRUCTIONAL_TYPE
Instructional Assignment is joined to Employee Position by PERSON_UID, POSITION, and JOB SUFFIX and where EFFECTIVE_END_DATE = '31-DEC-2099'.
EMPLOYEE_POSITION
PERSON_UID (FK)
POSITION (FK)
JOB_SUFFIX
EFFECTIVE_DATE
Non Instructional Assignment is joined to Employee Position by PERSON_UID, POSITION, and JOB SUFFIX and where EFFECTIVE_END_DATE = '31-DEC-2099'.
NONINSTRUCT_ASSIGN_SLOT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
PROFILE_CODE
SCHEDULE_OFFERING
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER
Instructional Assignment is joined to Meeting Time by ACADEMIC_PERIOD, COURSE_REFERENCE_NUMBER, and CATEGORY.
LABOR_COST_DISTRIBUTION
PERSON_UID
POSITION
JOB_SUFFIX
EFFECTIVE_DATE
MEETING_TIME
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
BEGIN_TIME
MONDAY_IND
TUESDAY_IND
WEDNESDAY_IND
THURSDAY_IND
FRIDAY_IND
SATURDAY_IND
SUNDAY_IND
MEETING_TIME_SLOT
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
Labor Cost Distribution is joined to Employee Position by PERSON_UID, POSITION, and JOB SUFFIX. EFFECTIVE_DATE is different for each view. Costs are differentiated by accounting distribution.

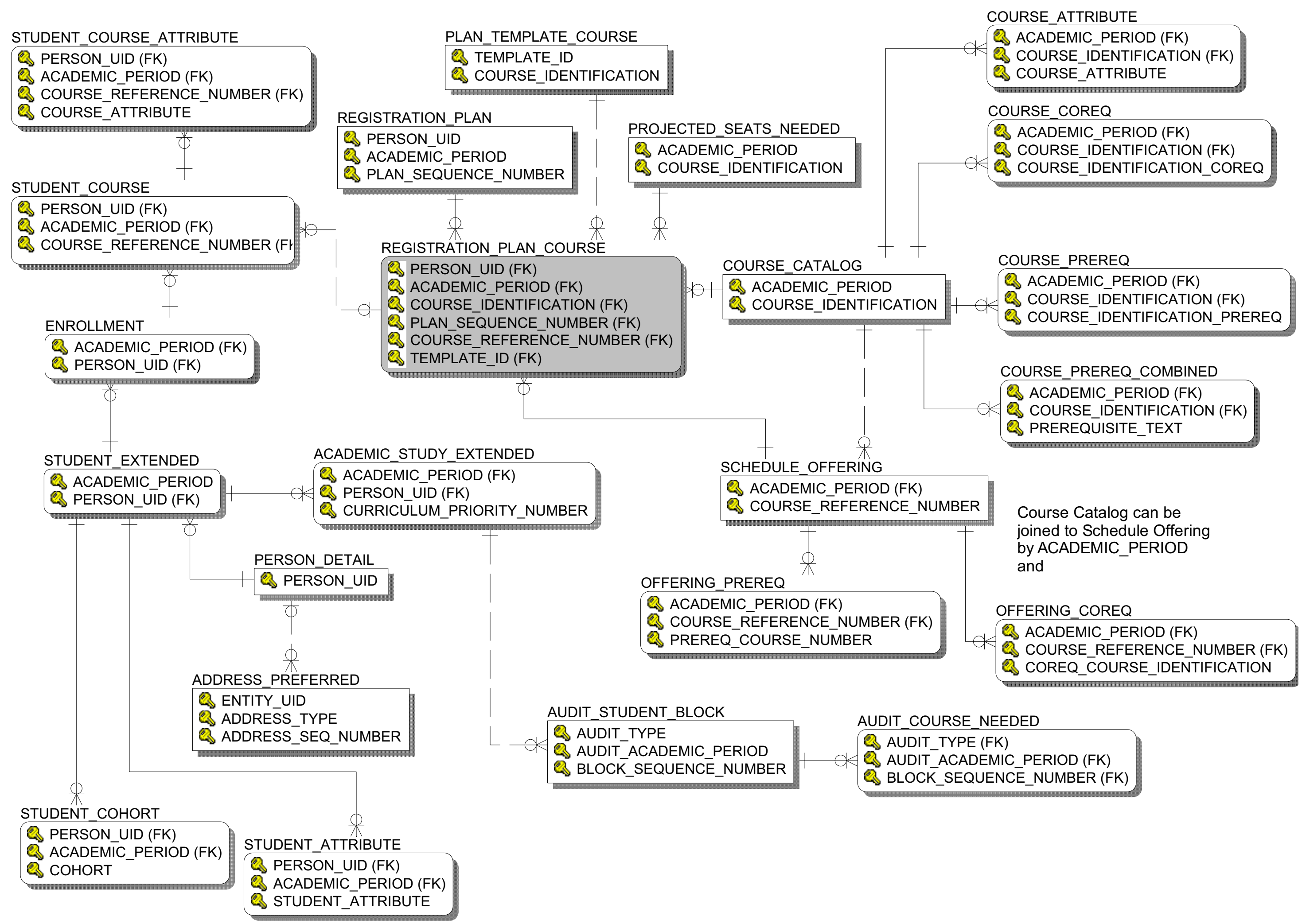
Government Reporting


Student Related Government Reporting
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
GOVERNMENT_ADMISSIONS
PERSON_UID (FK)
ACADEMIC_PERIOD
PERSON_DETAIL
PERSON_UID
GOVERNMENT_STUDENT
PERSON_UID (FK)
ACADEMIC_PERIOD
GOVERNMENT_COURSE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
SUBJECT
COURSE_NUMBER
GOVERNMENT_ACADEMIC_OUTCOME
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
OUTCOME_NUMBER
Financial Aid Related Government Reporting
GOVERNMENT_FINANCIAL_AID
AID_YEAR (FK)
FUND (FK)
FUND_SOURCE_TYPE (FK)
FINANCIAL_AID_TYPE (FK)
PERSON_UID (FK)
AID_ENROLLMENT_PERIOD (FK)
ACADEMIC_PERIOD (FK)
GOVERNMENT_FA_FUND
AID_YEAR (FK)
FUND (FK)
FUND_SOURCE_TYPE
FINANCIAL_AID_TYPE
ACADEMIC_PERIOD
is NULL in
Government Financial
Aid Fund.

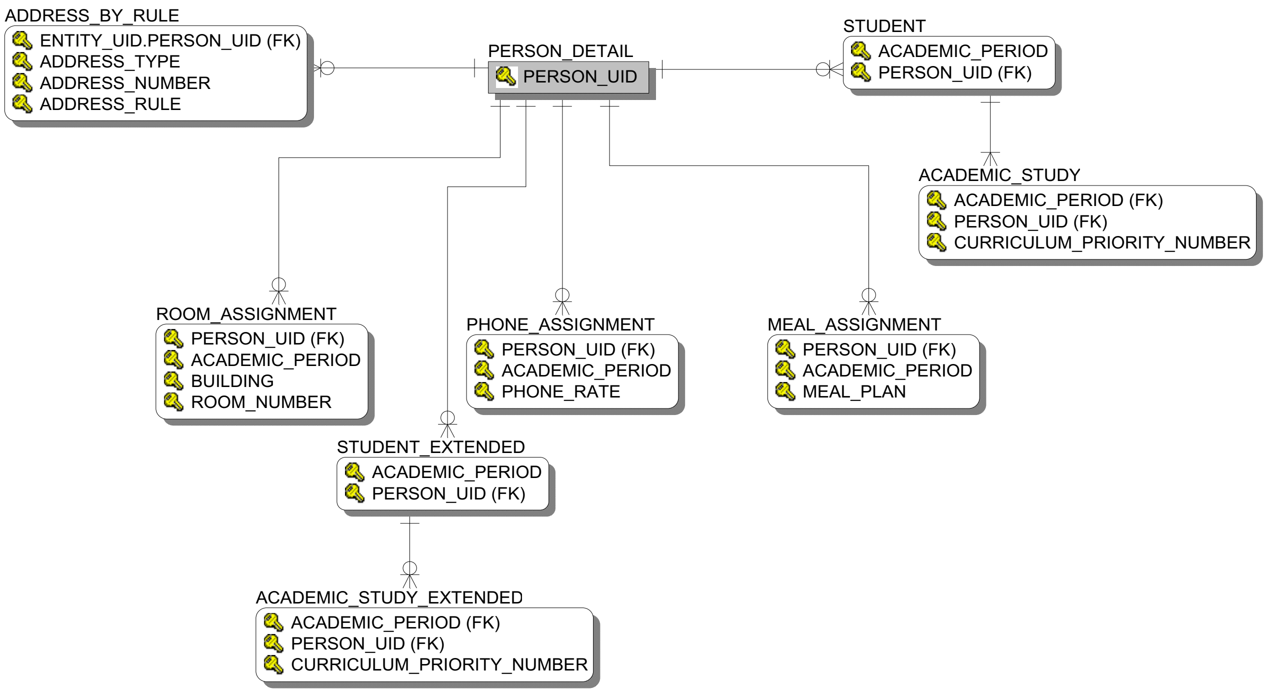
Recruitment Information



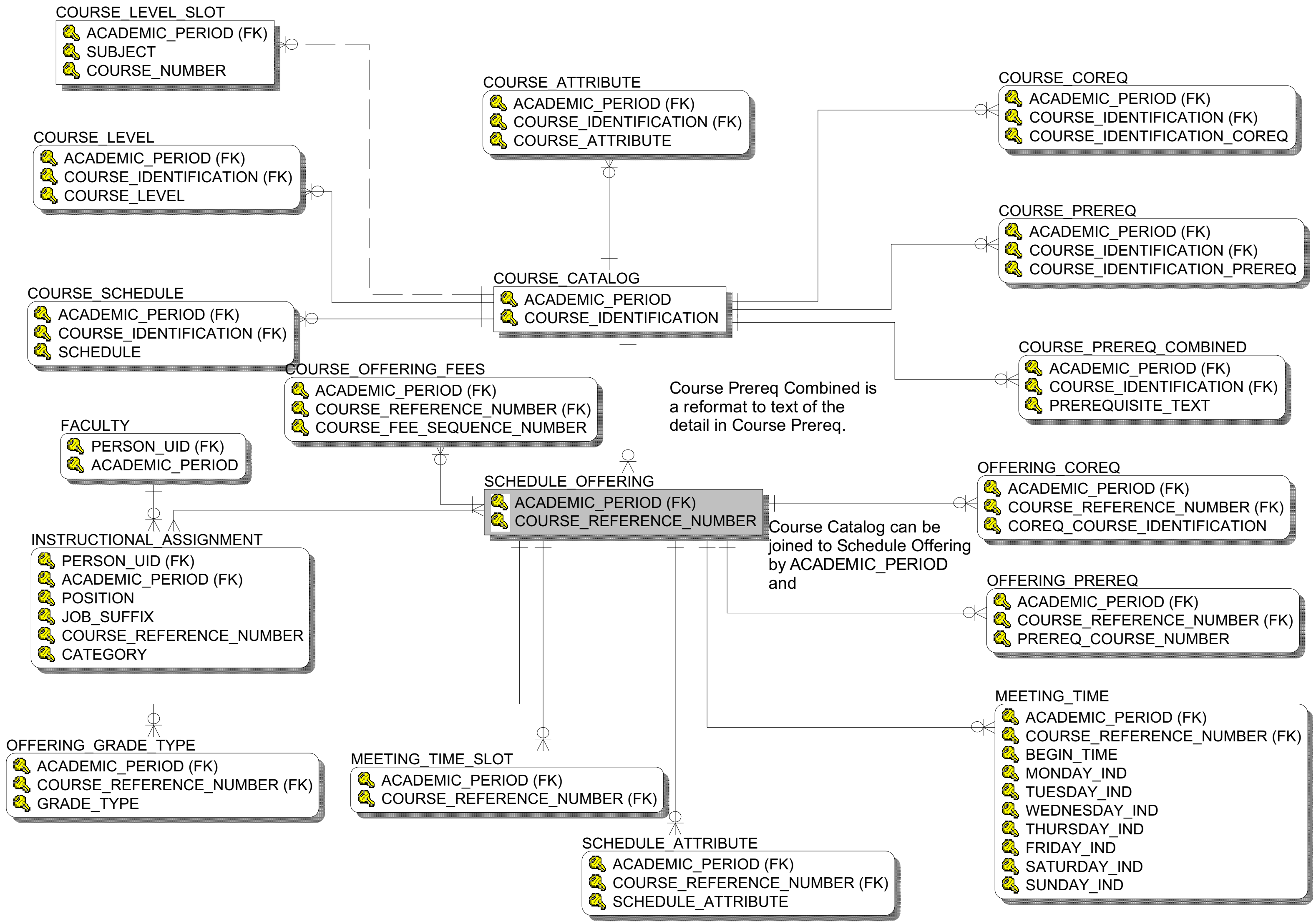
Registration Plan



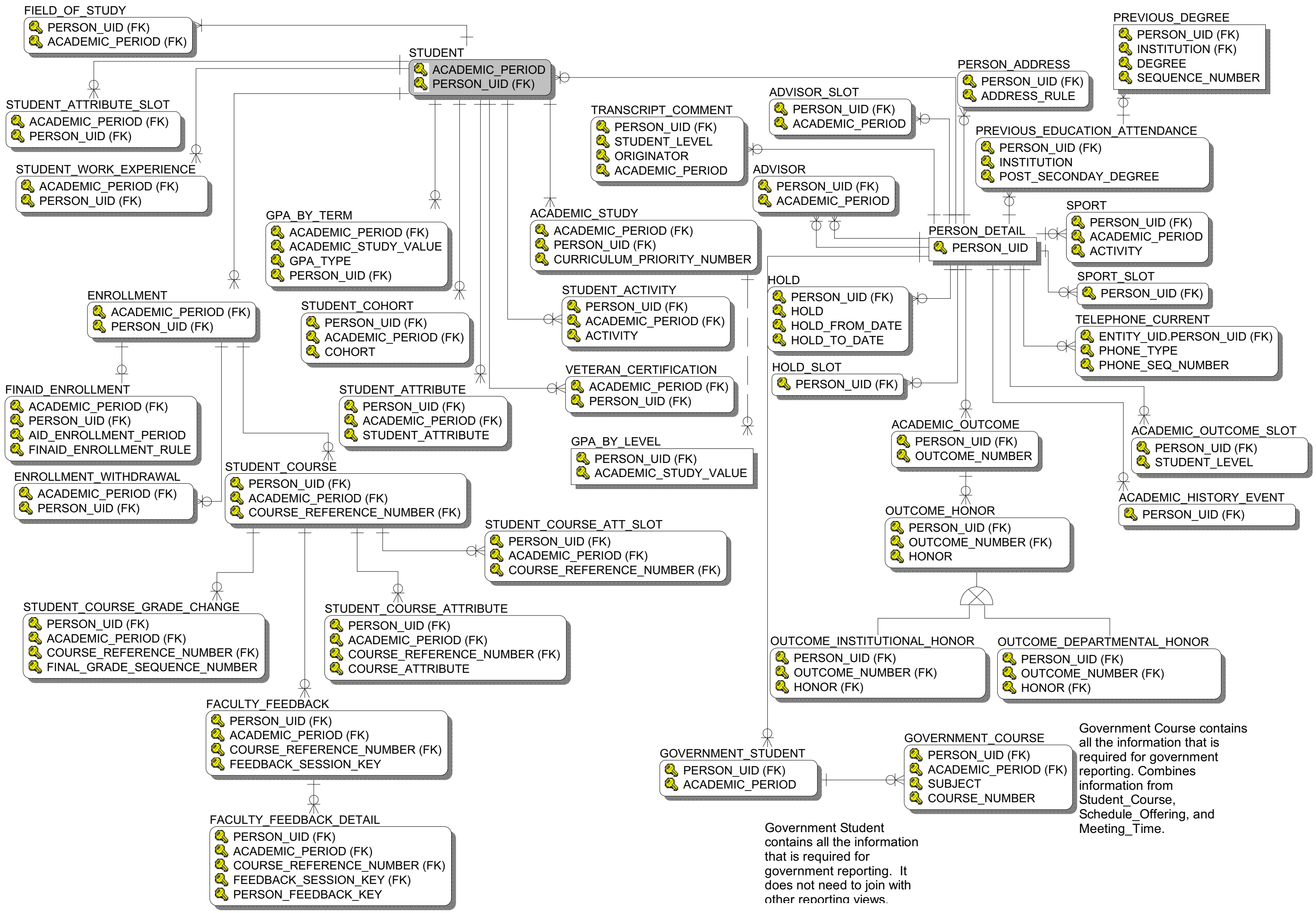
Residential Life



Schedule Offering

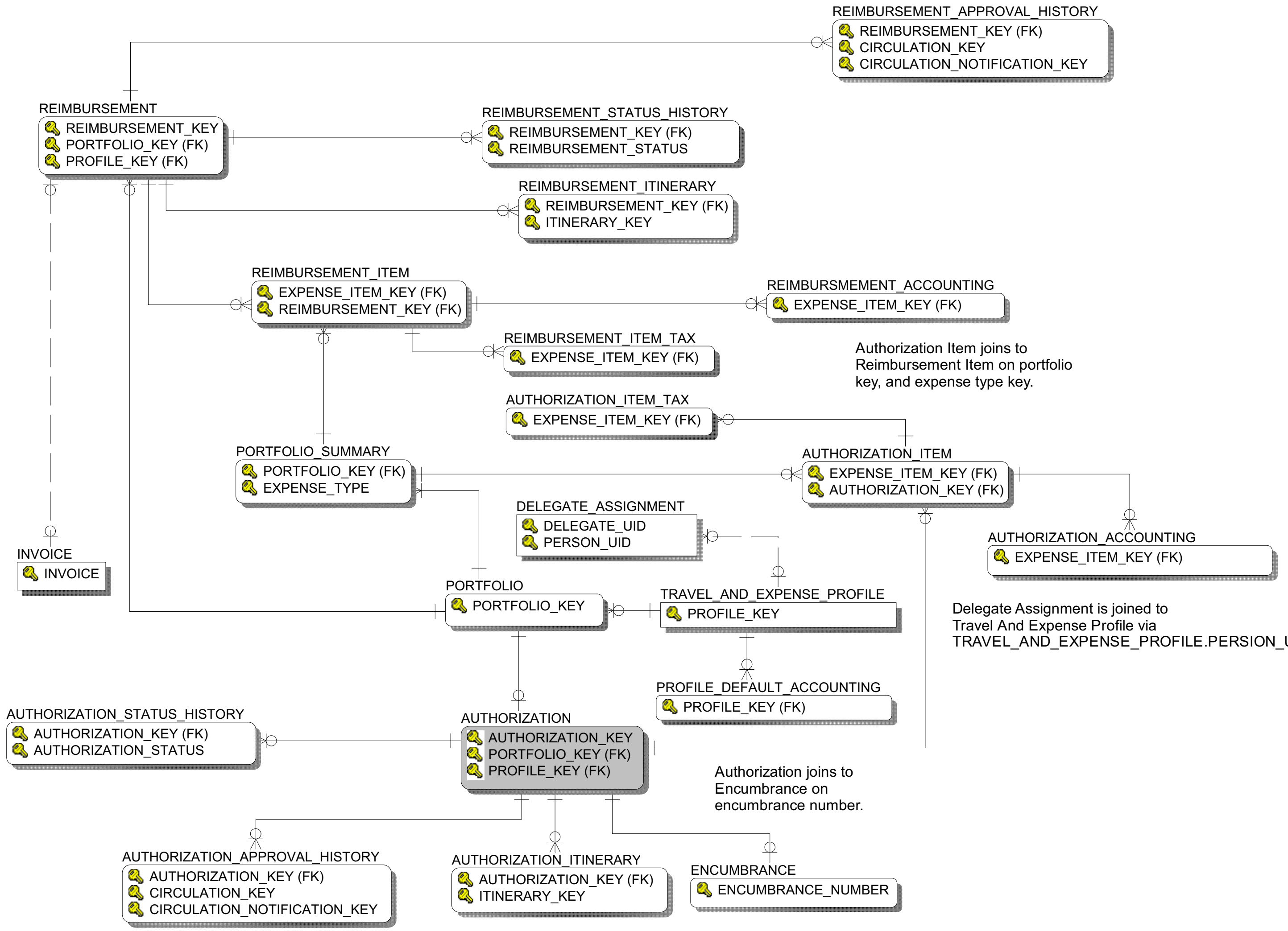

COURSE_LEVEL_SLOT
ACADEMIC_PERIOD (FK)
SUBJECT
COURSE_NUMBER
COURSE_ATTRIBUTE
ACADEMIC_PERIOD (FK)
COURSE_IDENTIFICATION (FK)
COURSE_ATTRIBUTE
COURSE_COREQ
ACADEMIC_PERIOD (FK)
COURSE_IDENTIFICATION (FK)
COURSE_IDENTIFICATION_COREQ
COURSE_LEVEL
ACADEMIC_PERIOD (FK)
COURSE_IDENTIFICATION (FK)
COURSE_LEVEL
COURSE_PREREQ
ACADEMIC_PERIOD (FK)
COURSE_IDENTIFICATION (FK)
COURSE_IDENTIFICATION_PREREQ
COURSE_SCHEDULE
ACADEMIC_PERIOD (FK)
COURSE_IDENTIFICATION (FK)
SCHEDULE
COURSE_CATALOG
ACADEMIC_PERIOD
COURSE_IDENTIFICATION
COURSE_PREREQ_COMBINED
ACADEMIC_PERIOD (FK)
COURSE_IDENTIFICATION (FK)
PREREQUISITE_TEXT
COURSE_OFFERING_FEES
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
COURSE_FEE_SEQUENCE_NUMBER
Course Prereq Combined is a reformat to text of the detail in Course Prereq.
FACULTY
PERSON_UID (FK)
ACADEMIC_PERIOD
SCHEDULE_OFFERING
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER
OFFERING_COREQ
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
COREQ_COURSE_IDENTIFICATION
INSTRUCTIONAL_ASSIGNMENT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
POSITION
JOB_SUFFIX
COURSE_REFERENCE_NUMBER
CATEGORY
Course Catalog can be joined to Schedule Offering by ACADEMIC_PERIOD and
OFFERING_PREREQ
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
PREREQ_COURSE_NUMBER
MEETING_TIME
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
BEGIN_TIME
MONDAY_IND
TUESDAY_IND
WEDNESDAY_IND
THURSDAY_IND
FRIDAY_IND
SATURDAY_IND
SUNDAY_IND
OFFERING_GRADE_TYPE
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
GRADE_TYPE
MEETING_TIME_SLOT
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
SCHEDULE_ATTRIBUTE
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
SCHEDULE_ATTRIBUTE

Student Detail

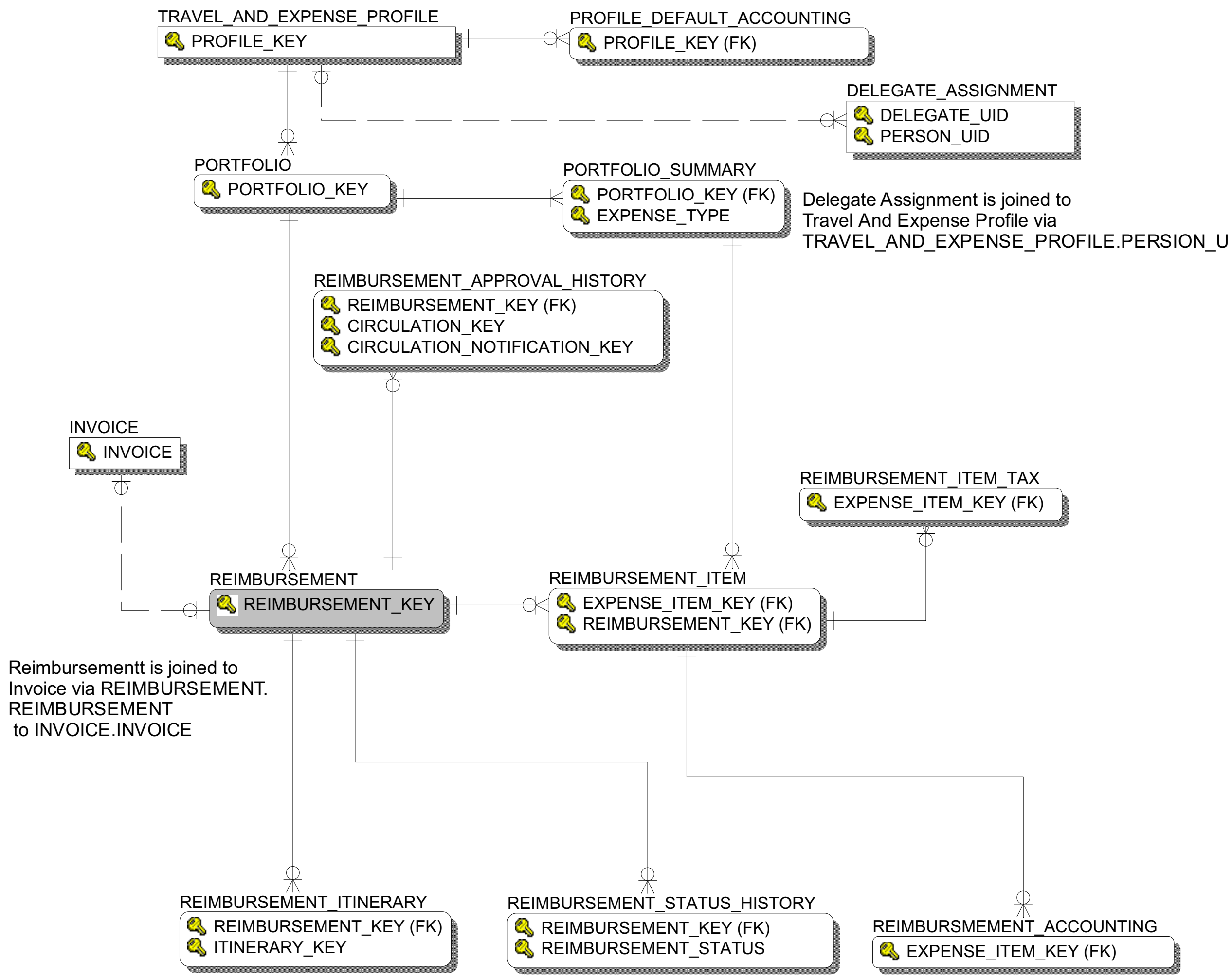

FIELD_OF_STUDY
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
STUDENT
ACADEMIC_PERIOD
PERSON_UID (FK)
STUDENT_ATTRIBUTE_SLOT
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT_WORK_EXPERIENCE
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
GPA_BY_TERM
ACADEMIC_PERIOD (FK)
ACADEMIC_STUDY_VALUE
GPA_TYPE
PERSON_UID (FK)
ENROLLMENT
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT_COHORT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COHORT
FINAID_ENROLLMENT
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
AID_ENROLLMENT_PERIOD
FINAID_ENROLLMENT_RULE
STUDENT_ATTRIBUTE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
STUDENT_ATTRIBUTE
ENROLLMENT_WITHDRAWAL
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
STUDENT_COURSE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
STUDENT_COURSE_ATT_SLOT
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
STUDENT_COURSE_GRADE_CHANGE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FINAL_GRADE_SEQUENCE_NUMBER
STUDENT_COURSE_ATTRIBUTE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
COURSE_ATTRIBUTE
FACULTY_FEEDBACK
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FEEDBACK_SESSION_KEY
FACULTY_FEEDBACK_DETAIL
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
COURSE_REFERENCE_NUMBER (FK)
FEEDBACK_SESSION_KEY (FK)
PERSON_FEEDBACK_KEY
TRANSCRIPT_COMMENT
PERSON_UID (FK)
STUDENT_LEVEL
ORIGINATOR
ACADEMIC_PERIOD
ACADEMIC_STUDY
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
CURRICULUM_PRIORITY_NUMBER
STUDENT_ACTIVITY
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
ACTIVITY
VETERAN_CERTIFICATION
ACADEMIC_PERIOD (FK)
PERSON_UID (FK)
GPA_BY_LEVEL
PERSON_UID (FK)
ACADEMIC_STUDY_VALUE
ADVISOR_SLOT
PERSON_UID (FK)
ACADEMIC_PERIOD
ADVISOR
PERSON_UID (FK)
ACADEMIC_PERIOD
PERSON_ADDRESS
PERSON_UID (FK)
ADDRESS_RULE
PREVIOUS_DEGREE
PERSON_UID (FK)
INSTITUTION (FK)
DEGREE
SEQUENCE_NUMBER
PREVIOUS_EDUCATION_ATTENDANCE
PERSON_UID (FK)
INSTITUTION
POST_SECONDAY_DEGREE
PERSON_DETAIL
PERSON_UID
SPORT
PERSON_UID (FK)
ACADEMIC_PERIOD
ACTIVITY
SPORT_SLOT
PERSON_UID (FK)
TELEPHONE_CURRENT
ENTITY_UID.PERSON_UID (FK)
PHONE_TYPE
PHONE_SEQ_NUMBER
HOLD
PERSON_UID (FK)
HOLD
HOLD_FROM_DATE
HOLD_TO_DATE
HOLD_SLOT
PERSON_UID (FK)
ACADEMIC_OUTCOME
PERSON_UID (FK)
OUTCOME_NUMBER
ACADEMIC_OUTCOME_SLOT
PERSON_UID (FK)
STUDENT_LEVEL
ACADEMIC_HISTORY_EVENT
PERSON_UID (FK)
OUTCOME_HONOR
PERSON_UID (FK)
OUTCOME_NUMBER (FK)
HONOR
OUTCOME_INSTITUTIONAL_HONOR
PERSON_UID (FK)
OUTCOME_NUMBER (FK)
HONOR (FK)
OUTCOME_DEPARTMENTAL_HONOR
PERSON_UID (FK)
OUTCOME_NUMBER (FK)
HONOR (FK)
GOVERNMENT_STUDENT
PERSON_UID (FK)
ACADEMIC_PERIOD
GOVERNMENT_COURSE
PERSON_UID (FK)
ACADEMIC_PERIOD (FK)
SUBJECT
COURSE_NUMBER
Government Course contains all the information that is required for government reporting. Combines information from Student_Course, Schedule_Offering, and Meeting_Time.
Government Student contains all the information that is required for government reporting. It does not need to join with other reporting views.

Travel and Expense

Authorization



Reimbursement



Travel and Expense Reporting Views

The following reporting views enable you to report on the Travel and Expense product.

Reporting View	Description
AUTHORIZATION	Reports on expense report authorization requests from travel and expense. This enables reporting by authorization status and contains information about the request for an authorization, its current status, expense owner information, and summary authorization amounts for reimbursable and non-reimbursable expenses. If the authorization has associated reimbursements, then this also contains summary amounts for the reimbursements as reimbursable and non-reimbursable.
AUTHORIZATION_ACCOUNTING	Reports on an expense authorization request's accounting distribution. This enables reporting of expense amounts by department and contains general expense accounting data including, fiscal year/period, accounting distribution, and approved amount. Additional reporting can be by financial manager or the various hierarchy levels of the fund, organization code, account, program, and location.
AUTHORIZATION_APPROVAL_HISTORY	Reports on the approval cycle and notifications for authorization requests from travel and expense. This contains approval history information for the authorization for each change in notification, including the person who is approving the document, what action was taken and when, and when email notification was sent.

Reporting View	Description
AUTHORIZATION_ITEM	Reports on expense authorization request details from travel and expense. This enables reporting of requested expenses at a detail level for each authorization containing what the expense description is, expected expense date, the expense type, unit rate for distance calculations or per diem calculations, payment method. It also has details if the expense is reimbursable or not, the calculated amount for the expense, and if the expense is to be paid for by personal credit card or institution card.
AUTHORIZATION_ITINERARY	Reports on a travel itinerary associated with an authorization. This contains information about a person's or group's plans for traveling with the start and end dates of travel as well as each starting and ending locations. The itinerary can be created at the time of the authorization request. This enables reporting to determine where and when a person may be at any one point in time while traveling.
AUTHORIZATION_STATUS_HISTORY	Reports on the various statuses of an expense authorization request as it migrates through various stages of completion. This enables reporting to determine how long the life cycle of an authorization may take as well as the history; if it was returned for corrections, denied, or approved. This contains each status change, the date it changed, the time in hours since the prior change, and the time in hours from inception to current status.
PORTFOLIO	Reports on the portfolio information from travel and expense. This enables reporting on travel and non-travel related expenses, travel start and end date, expense owner, business purpose, and various summarized amounts for the authorization and reimbursements within the portfolio. The portfolio is used to associate reimbursements with an authorization.
PORTFOLIO_SUMMARY	Reports on summarized amounts by expense type within a portfolio for the authorization and the reimbursement. This enables management to verify the reimbursements against the authorization.

Reporting View	Description
PROFILE_DEFAULT_ACCOUNTING	Reports on default accounting information for a travel and expense owner profile. This contains one or more accounting distributions and can be used to audit what accounting was actually used for reimbursements versus what account distributions were set up as defaults.
REIMBURSEMENT	Reports on expense report reimbursement requests from travel and expense. This enables reporting by reimbursement status and contains information about the request for a reimbursement, its current status, expense owner and payee information, and summary reimbursement amounts for reimbursable and non-reimbursable expenses. If the reimbursement is associated with an authorization, then this also contains summary amounts for the authorization as reimbursable and non-reimbursable.
REIMBURSEMENT_ACCOUNTING	Reports on an expense reimbursement request’s accounting distribution. This enables reporting of expense amounts by department and contains general expense reimbursement accounting data including, fiscal year/period, accounting distribution, and approved amount. Additional reporting can be by bank, and financial manager or the various hierarchy levels of the fund, organization code, account, program, and location.
REIMBURSEMENT_APPROVAL_HISTORY	Reports on the approval cycle and notifications for reimbursement requests from travel and expense. This contains approval history information for the reimbursement for each change in notification, including the person who is approving the document, what action was taken and when, and when email notification was sent.
REIMBURSEMENT_ITEM	Reports on expense reimbursement request details from travel and expense. This enables expenses to be reported at a detail level for each reimbursement. It contains the expense description, receipt date, the expense type, unit rate for distance calculations or per diem calculations, payment method, if the expense is reimbursable or not, the calculated amount for the expense, and if the expense was paid for by personal credit card or institution card.

Reporting View	Description
REIMBURSEMENT_ITINERARY	Reports on a travel itinerary associated with a reimbursement. This contains information about a person's or group's plans for traveling with the start and end dates of travel as well as each starting and ending locations. The itinerary may be created at the time of a reimbursement request. This enables reporting to determine where and when a person was at any one point in time while traveling.
REIMBURSEMENT_STATUS_HISTORY	Reports on the various statuses of an expense reimbursement request as it migrates through various stages of completion. This enables reporting to determine how long the life cycle of a reimbursement may take as well as the status history; if it was returned for corrections, denied, approved and when it was paid. This contains each status change, the date it changed, the time in hours since the prior change, and the time in hours from inception to the current status.
TRAVEL_AND_EXPENSE_PROFILE	Reports on current and default information for a travel and expense owner profile. This contains the approver for the expense owner, address type for check payment, email address, profile ID and name, workflow logon if the profile is for an approver, and the total amount reimbursed for the expense owner.

Reporting Views

Data from your source system database (for example, Student, Human Resources, Finance, etc.) is used to populate Banner ODS composite tables, and can be retrieved in reports using the Banner ODS reporting views. Use the Administrative UI to maintain and view meta data reports for each composite view (data on the source system used as an intermediate step to produce the composite tables and reporting views) and reporting view. The meta data reports enable you to look at the information about the composite or reporting view definition, and the column business definitions by either target, composite or reporting view, or by source administrative system sources.

For additional information on how to view meta data for the composite views or reporting views, refer to the *Administrative User Interface* chapter, “Composite View Meta Data” section. For additional information on how to maintain meta data for the composite or reporting views, and to maintain sources and source columns, refer to the *Administrative User Interface* chapter, “Meta Data” section.

List of Value Views

A list of values (LOV) contains a list of predefined values for a reporting view column in a report. For example, a list of values for Academic Period might contain the values Fall 2006, Spring 2007, and Summer 2007. You use lists of values in parameters or conditions for a report. When used in parameters or conditions, lists of values enable you to select predefined values rather than enter arbitrary values in a text field.

The Banner ODS has a database schema called ODSLOV that owns the list of value views. Most, but not all, of the views are based on the MGT_VALIDATION composite table. (At least one view is based on an MGRSDAX rule.) MGT_VALIDATION is loaded using Oracle Warehouse Builder (OWB) from validation tables (or in some cases static lists of values) in Banner.

Validation tables loaded into MGT_VALIDATION from Banner have been identified as lists of values that have views assigned to them. (Not all the MGT_VALIDATION validation tables have been created as LOV views.) Each view has the columns TABLE_NAME, VALUE, and VALUE_DESC. TABLE_NAME is the name of Banner validation table. VALUE and VALUE_DESC are values, or codes, and descriptions for the values. Some of the views also have QUALIFIER, and QUALIFIER_DESC. QUALIFIER is used to group values by a common attribute.

For example, it can be Chart of Accounts, Academic Period, or a Banner PIDM. QUALIFIER_DESC is a description for the QUALIFIER. Qualifier description is only populated when the qualifier is an Academic Period. For example, it can be Chart of Accounts, Academic Period or a Banner PIDM. QUALIFIER_DESC is a description for the QUALIFIER.

The list of value view provides one place to define the predefined values for a column in reporting views. For example, the LOV_ACADEMIC_PERIOD view contains a list of values that is used by Academic Period columns in many reporting views - such as ACADEMIC_OUTCOME, ACADEMIC_STUDY, etc.

By creating the predefined list in one view and using it for all the columns in the reporting views that require a predefined list of Academic Periods, the Banner ODS provides a simple to understand and use mechanism for creating parameters and conditions. If there were a different list of Academic Periods for every Academic Period column in every reporting view in the Banner ODS, there would be hundreds of different predefined lists of values that would be difficult for end users to understand and information technology departments to maintain.

The list of value view also provides fast access when producing the predefined values. If lists of values were created by selecting distinct values from the reporting views, more rows would be read to produce the list. This can result in unacceptable query times in reports when generating lists for parameter prompts and conditions.

ODSLOV list of value views are used in Self Service Reporting (SSR), the Banner ODS Cognos ReportNet model and Oracle Discoverer End User Layer. How these views are used is described in the SSR and Third Party Reporting Tools chapters.

The following table provides information about the list of value views in the ODSLOV schema for Banner or Degree Works.

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_ACADEMIC_ PERIOD	STVTERM	STVTERM					
LOV_ACADEMIC_ STANDING	STVASTD	STVASTD					
LOV_ACADEMIC_ TITLE	ACADEMIC_TITLE	PERBFAC					
LOV_ACADEMIC_ YEAR	STVACYR	STVACYR					
LOV_ACCOUNT_ ATTRIBUTE_SET	ACCOUNT_SET_ CODE	FTVATTS, FTRACTA	x				
LOV_ACCOUNT_ ATTRIBUTE_TYPE	ACCOUNT_ATTRIBUT E_TYPE	FTVATTT, FTRACTA	x				
LOV_ACCOUNT_ ATTRIBUTE_VALUE	ACCOUNT_ATTRIBUT E_VALUE	FTRATTV, FTRACTA	x				

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_ACCOUNT_ CLASS	ACCOUNT_CLASS	FTVSDAT	x			x	
LOV_ACCOUNT_ LEVEL_1	ACCOUNT_LEVEL_1	FTVACCT	x				
LOV_ACCOUNT_ LEVEL_2	ACCOUNT_LEVEL_2	FTVACCT	x				
LOV_ACCOUNT_ LEVEL_3	ACCOUNT_LEVEL_3	FTVACCT	x				
LOV_ACCOUNT_ LEVEL_4	ACCOUNT_LEVEL_4	FTVACCT	x				
LOV_ACCOUNT_ POOL	ACCOUNT_POOL	FTVACCT	x				
LOV_ACCOUNT_ TYPE_ATTR_SET	ACCOUNT_TYPE_ SET_CODE	FTRATYA, FTVATTS	x				
LOV_ACCOUNT_ TYPE_ATTR_ TYPE	ACCOUNT_TYPE_ ATTR_TYPE	FTVATTT, FTRATYA	x				
LOV_ACCOUNT_ TYPE_ATTR_ VALUE	ACCOUNT_TYPE_ ATTR_VALUE	FTRATTV, FTRATYA	x				
LOV_ACCOUNT_ TYPE_LEVEL_1	ACCOUNT_TYPE_ LEVEL_1	FTVATYP	x				

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_ACCOUNT_ TYPE_LEVEL_2	ACCOUNT_TYPE_ LEVEL_2	FTVATYP	x				
LOV_ACTIVITY	STVACTC	STVACTC					
LOV_ACTIVITY_ CATEGORY	STVACCG	STVACCG					
LOV_ACTIVITY_ TYPE	STVACTP	STVACTP					
LOV_ADDRESS_ TYPE	STVATYP	STVATYP					
LOV_ADMISSIONS_ ATTRIBUTE	STVATTS	STVATTS					
LOV_ADMISSIONS_ POPULATION	STVADMT	STVADMT					
LOV_ADMISSIONS_ RATING_ TYPE	STVRATP	STVRATP					
LOV_ADVANCEMEN T_FUND	ATVFUND	ATVFUND					
LOV_ADVISOR_ NAME_LFMI	ADVISOR_NAME_ LFMI	SGRADVR					x
LOV_ADVISOR_ TYPE	STVADVR	STVADVR					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_AID_FUND	RFRBASE	RFRBASE					
LOV_AID_YEAR	ROBINST	ROBINST					
LOV_APPLICATION _DECISION	STVAPDC	STVAPDC					
LOV_APPLICATION _STATUS	STVAPST	STVAPST					
LOV_ASSIGNMENT _GRADE	ASSIGNMENT_ GRADE	NBBPOSN					
LOV_ASSIGNMENT _PAY_ID	PTRPICT	PTRPICT					
LOV_ASSIGNMENT _SALARY_GROUP	NTRSGRP	NTRSGRP					
LOV_AUDIT_TYPE	AUDIT_TYPE						
LOV_AUDIT_RESUL T_TYPE	AUDIT_RESULT_ TYPE						
LOV_AWARD_ CATEGORY	STVACAT	STVACAT					
LOV_BENEFIT_ CATEGORY	PTRBCAT	PTRBCAT					
LOV_BENEFIT_ DEDUCTION	PTRBDCA	PTRBDCA					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_BLOCK_ SCHEDULE	STVBLCK	STVBLCK					
LOV_BLOCK_TYPE	BLOCK_TYPE	UCX_AUD04 7					
LOV_BLOCK_VALUE	BLOCK_VALUE	UCX_SCR00 4					
LOV_BUDGET	FTVOBUD	FTVOBUD	x				
LOV_BUDGET_ GROUP	RTVBGRP	RTVBGRP					
LOV_BUDGET_ PHASE	FTVOBPH	FTVOBPH	x				
LOV_BUILDING	STVBLDG	STVBLDG					
LOV_CALENDAR_ MONTH	CALENDAR_MONTH	STATIC (01,02,03,04, 05,06,07,08, 09,10,11,12))					
LOV_CAMPAIGN	AFBCAMP	AFBCAMP					
LOV_CAMPAIGN_ TYPE	ATVCMTP	ATVCMTP					
LOV_CAMPUS	STVCAMP	STVCAMP					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_CERTIFICATIO N	PTRCERT	PTRCERT					
LOV_CHART_OF_ ACCOUNTS	FTVCOAS	FTVCOAS				x	
LOV_CITIZEN_TYPE	STVCITZ						
LOV_COHORT	STVCHRT	STVCHRT					
LOV_COLLECTION_ AGENCY_NAME	COLLECTION_ AGENCY_NAME	TBRCOLC					x
LOV_COLLEGE	STVCOLL	STVCOLL					
LOV_COMMODITY	FTVCOMM	FTVCOMM				start date term date	
LOV_CONCENTRATI ON	STVMAJR	STVMAJR	x				
LOV_CONTRACT_ NUMBER	CONTRACT_NUMBER	NBRJOBS					
LOV_CONTRACT_ TYPE	CONTRACT_TYPE	STATIC (P,S,O)					
LOV_COUNTY	STVCNTY	STVCNTY					
LOV_COURSE_ ATTRIBUTE	STVATTR	STVATTR					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_COURSE_ CREDIT_TYPE	COURSE_CREDIT_ TYPE						
LOV_COURSE_ IDENTIFICATION	COURSE_ IDENTIFICATION	STVTERM, SCBCRSE			x		
LOV_COURSE_ REFERENCE_ NUMBER	COURSE_REFERENC E_NUMBER	STVTERM, SSBSECT			x		
LOV_COURSE_ STATUS	COURSE_STATUS						
LOV_COURSE_TAKE _TYPE	COURSE_TAKE_TYPE						
LOV_CURRENT_ TIME_STATUS	STVTMST	STVTMST					
LOV_DEPARTMENT	STVDEPT	STVDEPT					
LOV_DESIGNATION	ADBDESG	ADBDESG					
LOV_DISTRICT_ DIVISION	GTVDICD	GTVDICD					
LOV_DIVISION	STVDIVS	STVDIVS					
LOV_DONOR	ATVDONR	ATVDONR					
LOV_EARNINGS	PTREARN	PTREARN					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_EDUCATIONAL _GOAL	STVEGOL	STVEGOL					
LOV_EDUCATIONAL _LEVEL	STVEDLV	STVEDLV					
LOV_EEO_SKILL	PTVESKL	PTVESKL					
LOV_EMPLOYEE_ CLASS	PTRECLS	PTRECLS					
LOV_EMPLOYEE_ GROUP	PTVEGRP	PTVEGRP					
LOV_EMPLOYEE_ STATUS	EMPLOYEE_ STATUS	STATIC (A,B,L, F,P,T)					
LOV_EMPLOYER	PTREMPR	PTREMPR					
LOV_EMPLOYER_ CATEGORY	ATVJOBC	ATVJOBC					
LOV_EMPLOYER_ INDUSTRIAL_TYPE	ATVSICC	ATVSICC					
LOV_EMPLOYMENT _STATUS	ATVEMPS	ATVEMPS					
LOV_ENROLLMENT _STATUS	STVESTS	STVESTS					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_ETHNICITY	STVETHN	STVETHN					
LOV_FINANCE_ ACCOUNT	FTVACCT	FTVACCT	x			x	
LOV_FINANCE_ ACCOUNT_TYPE	FTVATYP	FTVATYP	x			x	
LOV_FINANCE_ ACTIVITY	FTVACTV	FTVACTV	x			x	
LOV_FINANCE_ FUND	FTVFUND	FTVFUND	x			x	
LOV_FINANCE_ FUND_TYPE	FTVFTYP	FTVFTYP	x			x	
LOV_FINANCE_ LOCATION	FTVLOCN	FTVLOCN	x			x	
LOV_FINANCE_ ORGANIZATION	FTVORGN	FTVORGN	x			x	
LOV_FINANCE_ PROGRAM	FTVPROG	FTVPROG	x			x	
LOV_FINANCIAL_ MANAGER	FINANCIAL_ MANAGER	FTVFUND		x			
LOV_FISCAL_ PERIOD	FTVFSPD	FTVFSPD	x			start date	

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DATE logic	Uses PIDM as Value
LOV_FISCAL_YEAR	FTVFSYR	FTVFSYR	x			start date	
LOV_FOREIGN_ CURRENCY	GTVCURR	GTVCURR				x	
LOV_FUND_ ATTRIBUTE_SET	FUND_SET_CODE	FTVATTS, FTRFNDA	x				
LOV_FUND_ ATTRIBUTE_TYPE	FUND_ATTRIBUTE_ TYPE	FTVATTT, FTRFNDA	x				
LOV_FUND_ ATTRIBUTE_VALUE	FUND_ATTRIBUTE_ VALUE	FTRATTV, FTRFNDA	x				
LOV_FUND_LEVEL_ 1	FUND_LEVEL_1	FTVFUND	x				
LOV_FUND_LEVEL_ 2	FUND_LEVEL_2	FTVFUND	x				
LOV_FUND_LEVEL_ 3	FUND_LEVEL_3	FTVFUND	x				
LOV_FUND_LEVEL_ 4	FUND_LEVEL_4	FTVFUND	x				
LOV_FUND_LEVEL_ 5	FUND_LEVEL_5	FTVFUND	x				
LOV_FUND_POOL	FUND_POOL	FTVFUND	x				

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_FUND_ SOURCE	RTVFSRC	RTVFSRC					
LOV_FUND_TYPE	RTVFTYP	RTVFTYP					
LOV_FUND_TYPE_ ATTR_SET	FUND_TYPE_ SET_CODE	FTVATTS, FTRFTYA	x				
LOV_FUND_TYPE_ ATTR_TYPE	FUND_TYPE_ ATTR_TYPE	FTVATTT, FTRFTYA	x				
LOV_FUND_TYPE_ ATTR_VALUE	FUND_TYPE_ ATTR_VALUE	FTRATTV,FT RFTYA	x				
LOV_FUND_TYPE_ LEVEL_1	FUND_TYPE_ LEVEL_1	FTVATYP	x				
LOV_FUND_TYPE_ LEVEL_2	FUND_TYPE_ LEVEL_2	FTVATYP	x				
LOV_GENDER	GENDER	STATIC (M,F,N)					
LOV_GEOGRAPHIC_ AREA	STVGEOR	STVGEOR					
LOV_GRADE_TYPE	STVGMOD	STVGMOD					
LOV_GRANT	FRBGRNT	FRBGRNT	x			term date	
LOV_HOLD	STVHLDD	STVHLDD					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_HR_ APPLICATION_ STATUS	PTRAPPS	PTRAPPS					
LOV_INCOME_ LEVEL	ATVINCM	ATVINCM					
LOV_INSTALLMENT_ PLAN	INSTALLMENT_ PLAN	TBBISTC					
LOV_INSTRUCTION AL_METHOD	GTVINSM	GTVINSM					
LOV_INSTRUCTOR_ NAME	INSTRUCTOR_ NAME	STVTERM, SPRIDEN, SIRASGN		x		x	
LOV_INSUFFICIENT _REASON	INSUFFICIENT_ REASON						
LOV_INTERNAL_ ACCOUNT_TYPE	INTERNAL_ACCOUNT _TYPE	FTVSDAT	x			x	
LOV_INTERNAL_ FUND_TYPE	INTERNAL_FUND_ TYPE	FTVSDAT	x			x	
LOV_INTERVIEW_ STATUS	STVINTV	STVINTV					
LOV_JOB_LEAVE_ CATEGORY	PTRLEAV	PTRLEAV					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_JOB_SUFFIX	JOB_SUFFIX	STATIC (0,00,01,02,0 3)					
LOV_LEADERSHIP_ ROLE	STVLEAD	STVLEAD					
LOV_LEAVE_OF_ ABSENCE_REASON	PTRLREA	PTRLREA					
LOV_LEGACY	STVLGCY	STVLGCY					
LOV_LEVEL	STVLEVL	STVLEVL					
LOV_LOCATION_ LEVEL_1	LOCATION_ LEVEL_1	FTVLOCN	x				
LOV_LOCATION_ LEVEL_2	LOCATION_ LEVEL_2	FTVLOCN	x				
LOV_LOCATION_ LEVEL_3	LOCATION_ LEVEL_3	FTVLOCN	x				
LOV_LOCATION_ LEVEL_4	LOCATION_ LEVEL_4	FTVLOCN	x				
LOV_MAIL	GTVMAIL	GTVMAIL					
LOV_MAJOR	STVMAJR	STVMAJR					
LOV_MARITAL_ STATUS	STVMRTL	STVMRTL					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_MEAL_PLAN	STVMRCD	STVMRCD					
LOV_MEETING_ TYPE	GTVMTYP	GTVMTYP					
LOV_MINOR	STVMAJR	STVMAJR	x				
LOV_NATION	STVNATN	STVNATN					
LOV_NATIVE_ LANGUAGE	STVLANG	STVLANG					
LOV_ORGANIZATIO N_ATTR_SET	ORGANIZATION_ SET_CODE	FTVATTS, FTRORGA	x				
LOV_ORGANIZATIO N_ATTR_ TYPE	ORGANIZATION_ ATTR_TYPE	FTVATTT, FTRORGA	x				
LOV_ORGANIZATIO N_ATTR_ VALUE	ORGANIZATION_ ATTR_VALUE	FTRATTV, FTRORGA	x				
LOV_ORGANIZATIO N_LEVEL_1	ORGANIZATION_ LEVEL_1	FTVORGN	x				
LOV_ORGANIZATIO N_LEVEL_2	ORGANIZATION_ LEVEL_2	FTVORGN	x				
LOV_ORGANIZATIO N_LEVEL_3	ORGANIZATION_ LEVEL_3	FTVORGN	x				

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_ORGANIZATIO N_LEVEL_4	ORGANIZATION_ LEVEL_4	FTVORGN	x				
LOV_ORGANIZATIO N_LEVEL_5	ORGANIZATION_ LEVEL_5	FTVORGN	x				
LOV_ORGANIZATIO N_LEVEL_6	ORGANIZATION_ LEVEL_6	FTVORGN	x				
LOV_ORGANIZATIO N_LEVEL_7	ORGANIZATION_ LEVEL_7	FTVORGN	x				
LOV_ORGANIZATIO N_POOL	ORGANIZATION_ POOL	FTVORGN	x				
LOV_ORG_FINANCI AL_MANAGER	ORG_FINANCIAL_ MANAGER	SPRIDEN, FTVORGN		x			
LOV_OUTCOME	STVDEGC	STVDEGC					
LOV_OUTCOME_ STATUS	STVDEGS	STVDEGS					
LOV_PACKAGING_ GROUP	RTVPGRP	RTVPGRP					
LOV_POSITION	NBBPOSN	NBBPOSN					
LOV_POSITION_ CHANGE_REASON	PTRJCRE	PTRJCRE					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_POSITION_ CLASS	NTRPCLS	NTRPCLS					
LOV_POSITION_ DEFERRED_PAY	PTRDFPR	PTRDFPR					
LOV_POSITION_ LOCATION	PTRJBLN	PTRJBLN					
LOV_POSITION_ STATUS	POSITION_STATUS	STATIC (A,C,F,I)					
LOV_POST_CODE	GTVZIPC	GTVZIPC					
LOV_POST_SECON DARY_SCHOOL	POST_SECONDARY_ SCHOOL	STVSBGI					
LOV_PREF_CLASS	PREF_CLAS	APBCONS					
LOV_PRIM_DISABILI TY	STVDISA	STVDISA					
LOV_PRINCIPAL_ INVESTIGATOR	PRINCIPAL_ INVESTIGATOR	FRBGRNT		x			
LOV_PROGRAM	SMRPRLE	SMRPRLE					
LOV_PROGRAM_ ATTR_SET	PROGRAM_SET_ CODE	FTVATTS, FTRPRGA	x				
LOV_PROGRAM_ ATTR_TYPE	PROGRAM_ATTR_ TYPE	FTVATTR, FTRPRGA	x				

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_PROGRAM_ ATTR_VALUE	PROGRAM_ATTR_ VALUE	FTRATTV, FTRPRGA	x				
LOV_PROGRAM_ CLASSIFICATION	STVCIPC	STVCIPC					
LOV_PROGRAM_ LEVEL_1	PROGRAM_ LEVEL_1	FTVPROG	x				
LOV_PROGRAM_ LEVEL_2	PROGRAM_ LEVEL_2	FTVPROG	x				
LOV_PROGRAM_ LEVEL_3	PROGRAM_ LEVEL_3	FTVPROG	x				
LOV_PROGRAM_ LEVEL_4	PROGRAM_ LEVEL_4	FTVPROG	x				
LOV_PROGRESS_ EVALUATION	STVPREV	STVPREV					
LOV_PROJECT	ATVPROJ	ATVPROJ					
LOV_PROSPECT_ STATUS	ATVPRST	ATVPRST					
LOV_RACE_ CATEGORY	GTVRRAC						
LOV_RATING	ATVRATE	ATVRATE					
LOV_RATING_TYPE	ATVRTGT	ATVRTGT					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_RECEIVABLE_ CATEGORY	TTVDCAT	TTVDCAT					
LOV_RECEIVABLE_ CONTRACT	RECEIVABLE_ CONTRACT	STVTERM, TBBCONT			x		
LOV_RECEIVABLE_ DELINQUENCY	TTVDELI	TTVDELI, TBBACCT					
LOV_RECEIVABLE_ DETAIL_ CODE	TBBDETC	TBBDETC					
LOV_RECEIVABLE_ EXEMPTION	RECEIVABLE_ EXEMPTION	STVTERM, TBBEXPT			x		
LOV_RECEIVABLE_ SOURCE	TTVSRCE	TTVSRCE					
LOV_RECRUITER	STVRECR	STVRECR					
LOV_REGISTRATIO N_REASON	STVRGRE	STVRGRE					
LOV_REGISTRATIO N_STATUS	STVRSTS	STVRSTS					
LOV_RESIDENCY	STVRESD	STVRESD					
LOV_REVIEW_TYPE	PTVREVT	PTVREVT					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_SCHEDULE_ TYPE	STVSCHD	STVSCHD					
LOV_SECONDARY_ SCHOOL	SECONDARY_ SCHOOL	STVSBGI					
LOV_SITE	STVSITE	STVSITE					
LOV_SOLICITATION_ TYPE	ATVSOLC	ATVSOLC					
LOV_SOLICITOR_ TYPE	ATVSOLT	ATVSOLT					
LOV_SOURCE_ BACKGROUND	STVSBGI	STVSBGI					
LOV_SPORT	SPORTS						
LOV_SPORT_ ELIGIBILITY	STVELIG						
LOV_STATE_ PROVINCE	STVSTAT	STVSTAT					
LOV_STUDENT_ CLASS	STVCLAS	STVCLAS					
LOV_STUDENT_ POPULATION	STVSTYP	STVSTYP					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_STUDENT_ STATUS	STVSTST	STVSTST					
LOV_SUBJECT	STVSUBJ	STVSUBJ					
LOV_SUB_ACADEMI C_PERIOD	STVPTRM	STVPTRM					
LOV_TERMINATION_ REASON	PTRTREA	PTRTREA					
LOV_TEST	STVTESC	STVTESC					
LOV_TEST_RULE	TEST	MGRSDAX_ INTERNAL_ CODE_ GROUP					
LOV_TRACKING_ GROUP	RTVTGRP	RTVTGRP					
LOV_VENDOR_ TYPE	FTVVTYP	FTVVTYP				start date term date	
LOV_VETERAN_ CATEGORY	STVVETC	STVVETC					
LOV_VISA	STVVTYP	STVVTYP					
LOV_WITHDRAW_ REASON	STVWRSN	STVWRSN					

List of Value View Name	ODS Table Name	Source Table Name	Has Chart of Accounts Qualifier	Has PIDM Qualifier	Has Academic Period Qualifier	Uses EFFECTIVE_ DATE and NEXT_ CHANGE_DA TE logic	Uses PIDM as Value
LOV_WORKER_ COMPENSATION_ CLASS	PTVWKCP	PTVWKCP					

Banner ODS Reports

You can use Cognos to generate and view illustrative reports shipped with the Banner Operational Data Store product. A System Administrator should copy the reports to your institution's folder so that you can adapt them to your institution's needs.

These reports are created using Cognos Report Studio. You can create simple, ad hoc queries and reports using Query Studio. You have the ability to 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.

All reports include interactive prompts that allow you to use the same report multiple times for different target populations.

Materialized view cascading report prompts

With the ODS 8.5 release, Ellucian introduced a solution using Materialized views for cascading report prompts. This enables institutions to get a distinct list of values for a set of codes in report prompts and greatly improves the performance when using the prompts in the reports. These materialized views can also be leveraged for any other reports that users might create.

Note: This solution will not be available with reports that use the Oracle Discoverer reporting tool.

Refer "Administrative User Interface" chapter in *Banner ODS Administration Guide* for a list of these materialized views and more details on them.

Reports for Banner Operational Data Store

ODS Reports are located in a folder on the "Public Folder" page labeled "Operational Data Store Reports". The delivered reports are in a "Reports" folder grouped in folders based on the name of the package used for the data in the report. There are two packages:

- Audit Student
- Registration Plan

Audit Student reports

The reports based on the Audit Student package/business concept are used to identify students close to graduation and which students may be at risk of not completing their outcomes based upon various filters by program, major, minor, and concentration. These reports can also identify students receiving degrees or certificates and receiving Financial Aid.

The following Report Studio reports are delivered in the **Banner Operational Data Store Reports** > **Reports** > **Audit Student** folder under the Public Folders tab:

- Audit Student by Range Summary
- Audit Student List Detail
- Audit Student Course List Detail
- Audit Student Non-Course List Detail

Audit Student by Range Summary report

The Audit Student by Range Summary report provides a head count of students audited within institution-specified predefined ranges based upon selected population filters to determine students close to graduation based upon credits or courses and students that may be at risk of not completing their outcomes.

The ranges provided are:

- Percent Requirements Completed
- Percent Credits Completed
- Credits Needed
- Courses Needed
- Credits Applied
- Courses Applied
- GPA

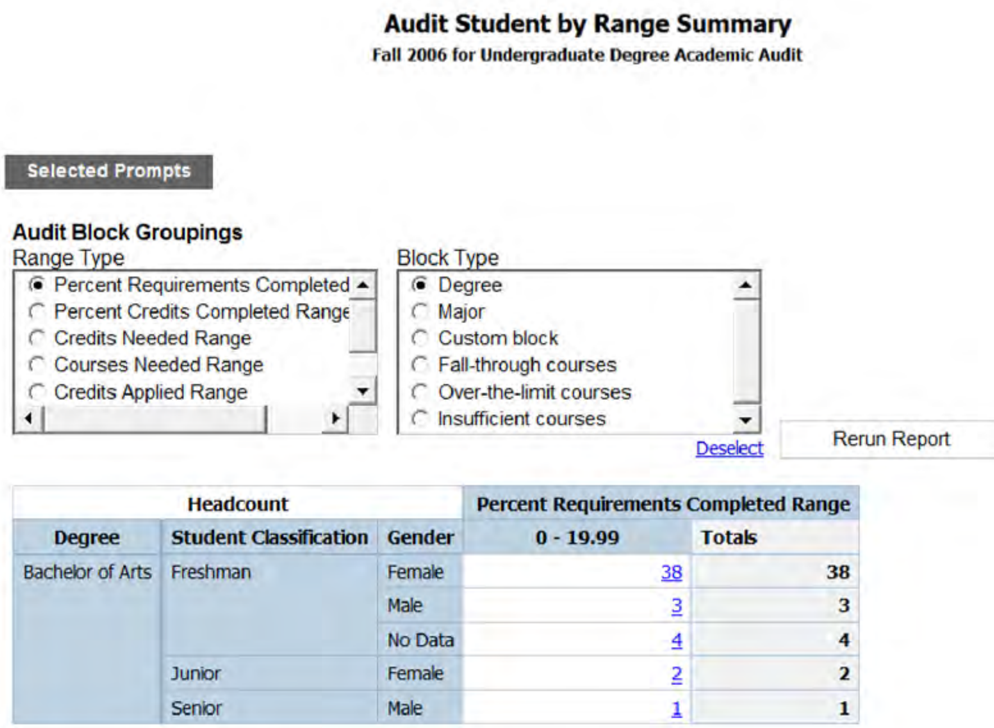
The ranges can be filtered by the following characteristics:

- Audit block type
- Academic study characteristics (College, Concentration, Degree, Department, Major, Minor, or Program)
- Student characteristics (Holds, Sport, Sport eligibility, Student attribute, Student classification, Cohort, or Student population)
- Demographic characteristics (Citizenship, Gender, Race category, or Veteran category)

This report would be used by an Advisor or the Registrar to identify populations of students who may require assistance to be successful in their program based upon percentage of requirements completed or credits completed. These populations may be identified as follows:

- Populations of students identified as close to or below their minimum GPA.
- Populations of students identified as close to graduation and receiving financial aid.

You can drill on various range headcount values in the Audit Student by Range Summary report to access the Audit Student List Detail report for further analysis at the student level and obtain the list of students to contact.



Headcount			Percent Requirements Completed Range	
Degree	Student Classification	Gender	0 - 19.99	Totals
Bachelor of Arts	Freshman	Female	38	38
		Male	3	3
		No Data	4	4
	Junior	Female	2	2
	Senior	Male	1	1

Report package

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

Business Questions / Goals

This report answers the following business questions:

1. What is the total number of students broken down within each percent credits completed range by student classification, degree, major, concentration or minor?

   Goal: Identify students close to graduation based upon the percent of credits completed.

2. What is the total number of students broken down within each percent requirements completed range by student classification, degree, major, concentration or minor?

   Goal: Identify students close to graduation based upon degree requirements completed.

3. What is the total number of students at risk of not meeting minimum GPA applicable to their degree or within their major, minor, or concentration?

Goal: Identify students below minimum GPA.

Audit Student by Range Summary - report prompts

When executing a report, you must first identify the selection values for the data to be displayed on the report. These desired selection values are input on the prompt page which is the first page displayed when a report is chosen to be run.

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
Audit Academic Period (*)	Select Audit Academic Period to specify which creation audit time period to use when selecting the data to display in the report.	p_Academic Period
Student Level (*)	Select a student level to specify the level associated with the students selected to be displayed in the report.	p_Student Level
Audit Type (*)	Select Audit Type to specify which audit data to display in the report. A number of different audit types may be available depending on your institution's use of Degree Works.	p_Audit Type

Note: Audit Type (*): Academic Audit is the most common and will be the default selection value. However, the report can utilize the ‘Plan Audit’ filter if the plan audit was run. Choose the audit type of ‘Plan Audit’. This takes into consideration courses planned as courses applied to obtain a better understanding of courses that will be completed towards the student’s outcome.

Audit Block Groupings

The Audit Block Groupings prompts let you filter the report based on a predetermined set of ranges that have institution specified values loaded into the ODS via ODS Extract Parameters to determine student progress toward satisfying different sets of outcome requirements.

The report may run with the default values or the user may change the values to report the desired data.

Prompt	Description	Parameter
Range Type	There are 7 different types of ranges the report can display student head counts for. One must be chosen. This field will display *Percent Requirements Completed* as the default Range Type for this report.	p_Range Type
Block Type	Select Block Type to specify which scribed audit block to display. This field will display *Degree* as the default Block Type for this report.	p_Block Type

Academic Study prompts

The Academic Study prompts are prompts that you can use to group and filter the students by their academic study characteristics. For this report you may select up to two categories of Academic Study characteristic grouping prompts:

- Academic Study Category 1 (required prompt)
- Academic Study Category 2 (optional prompt)

Prompt	Description	Parameter
Academic Study Category 1	Select any one of the preferred Academic Study Characteristic values. Each academic study prompt selected will display a second box with corresponding options for that value.	p_Academic Study Category1
Academic Study Category 2		p_Academic Study Category2

Each Academic Study category has a list of Academic Study Characteristic values from which you can choose one that you want to filter your report on. Select one of the values to obtain a second box with corresponding options for that value. For example, if you select Degree in the first box, it displays a second box with options for all the available degrees. You can select one Academic Study Characteristic value from each category to obtain a filtered result for your report.

The following table shows the list of Academic Study Characteristic Prompt values under Academic Study Category 1 and Academic Study Category 2:

Prompt	Description	Parameter
College	Select one or more colleges to display in the report.	p_College

Prompt	Description	Parameter
Concentration	Select one or more major areas of concentration to display in the report.	p_Concentration
Degree	Select one or more degrees to display in the report.	p_Degree
Department	Select one or more departments to display in the report.	p_Department
Major	Select one or more major subjects of study to display in the report.	p_Major
Minor	Select one or more minor subjects of study to display in the report.	p_Minor
Program	Select one or more programs to display in the report.	p_Program

Student Group prompts

The Student Group 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 academic period and level. There are two categories of Student Group prompts:

- Student Group Category 1
- Student Group Category 2

<table>
<tr><th>Prompt</th><th>Description</th><th>Parameter</th></tr>
<tr><td>Student Group Category 1</td><td rowspan="2">Select any one of the preferred Student Characteristic values. This will display a second box with corresponding options for that value.</td><td>p_Student Group Category1</td></tr>
<tr><td>Student Group Category 2</td><td>p_Student Group Category2</td></tr>
</table>

Prompt	Description	Parameter
Hold	Select one or more reasons for which the students may have a hold on their account.	p_Hold
Sport	Select one or more sports to display in the report.	p_Sport
Sport Eligibility	Select one or more sports eligibility codes to display in the report.	p_Sport Eligibility

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

Demographic Group Category prompts

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

Prompt	Description	Parameter
Citizenship	Select one or more citizenship types to display in the report.	p_Citizenship Type
Gender	Select one or more genders to display in the report.	p_Gender
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

Audit Student by Range Summary - report composition overview

The report composition overview provides a high level introduction to features used by Ellucian 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 Audit Student List Detail report. The following table specifies the drill-through parameter values for the Audit Student List Detail report. These are the parameter values that need to be passed from the Audit Student by Range Summary report to the Audit Student List Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	Yes	Pass parameter value	p_Academic Period
p_Student Level	Yes	Pass parameter value	p_Student Level
drill1_College		Pass data item value	College ASC1 for Drill
drill1_Concentration		Pass data item value	First Concentration ASC1 for Drill
drill1_Degree		Pass data item value	Degree ASC1 for Drill
drill1_Department		Pass data item value	Department ASC1 for Drill
drill1_Hold		Pass data item value	Hold SGC1 for Drill
drill1_Major		Pass data item value	Major ASC1 for Drill
drill1_Minor		Pass data item value	First Minor ASC1 for Drill
drill1_Program		Pass data item value	Program ASC1 for Drill
drill1_Sport		Pass data item value	Activity SGC1 for Drill
drill1_Sport Eligibility		Pass data item value	Eligibility SGC1 for Drill
drill1_Student Attribute		Pass data item value	Student Attribute SGC1 for Drill
drill1_Student Classification		Pass data item value	Student Classification SGC1 for Drill
drill1_Student Cohort		Pass data item value	Cohort SGC1 for Drill
drill1_Student Population		Pass data item value	Student Population SGC1 for Drill
drill2_College		Pass data item value	College ASC2 for Drill
drill2_Concentration		Pass data item value	First Concentration ASC2 for Drill
drill2_Degree		Pass data item value	Degree ASC2 for Drill
drill2_Department		Pass data item value	Department ASC2 for Drill
drill2_Hold		Pass data item value	Hold SGC2 for Drill
drill2_Major		Pass data item value	Major ASC2 for Drill

Parameter	Required	Method	Value
drill2_Minor		Pass data item value	First Minor ASC2 for Drill
drill2_Program		Pass data item value	Program ASC2 for Drill
drill2_Sport		Pass data item value	Activity SGC2 for Drill
drill2_Sport Eligibility		Pass data item value	Eligibility SGC2 for Drill
drill2_Student Attribute		Pass data item value	Student Attribute SGC2 for Drill
drill2_Student Classification		Pass data item value	Student Classification SGC2 for Drill
drill2_Student Cohort		Pass data item value	Cohort SGC2 for Drill
drill2_Student Population		Pass data item value	Student Population SGC2 for Drill
drill_Academic Study Category1		Pass parameter value	p_Academic Study Category1
drill_Academic Study Category2		Pass parameter value	p_Academic Study Category2
drill_Citizenship		Pass data item value	Citizenship Type for Drill
drill_Courses Applied Range		Pass data item value	Courses Applied Range
drill_Courses Needed Range		Pass data item value	Courses Needed Range
drill_Credits Applied Range		Pass data item value	Credits Applied Range
drill_Credits Needed Range		Pass data item value	Credits Needed Range
drill_Credits Percent Complete		Pass data item value	Credits PCT Complete Range
drill_Demographic Group Category		Pass parameter value	p_Demographic Group Category
drill_GPA Range		Pass data item value	GPA Range
drill_Gender		Pass data item value	Gender for Drill
drill_Race Category		Pass data item value	Race Category for Drill
drill_Range Type		Pass data item value	p_Range Type

Parameter	Required	Method	Value
drill_Require Percent Complete		Pass data item value	Require PCT Complete Range
drill_Student Group Category1		Pass data item value	p_Student Group Category1
drill_Student Group Category2		Pass data item value	p_Student Group Category2
drill_Veteran Category		Pass data item value	Veteran Category for Drill
p_Audit Type	Yes	Pass parameter value	p_Audit Type
p_Block Type		Pass parameter value	p_Block Type

Audit Student List Detail report

The Audit Student List Detail report lists information about the student based upon audited block requirements. It can be filtered on a variety of student characteristics, academic study characteristics, academic performance characteristics, audited block requirements, demographics, advisor, or financial aid indicators.

This report would be used by the Advisor, Registrar, or Department Dean to review groups of student based on selection criteria specified on where they are in satisfying defined audit block requirements.

You can drill on various headcount values in the Audit Student List Detail report to access the Audit Student Course List Detail report of a student to obtain a list of courses applied for a student by selecting the number in the Courses Applied column.

Note: Selecting the number for the Degree or Program (block sequence number = 1) will display a count that includes all courses applied in any block that is referenced by that block. Typically that is all the blocks except the Out-of-Limit and Insufficient blocks which meet no requirement. Other blocks with block sequence numbers = 2 - 89 will not be available to drill. Blocks Fall-through (90), Out-of-Limit (91), and Insufficient (92) will permit drill through.

Audit Student List Detail

Fall 2006 for Undergraduate Academic Audit

Student								Academic Study											Academic Performance			
Name	Student Classification	Email	Phone Number	Student Cohort Count	Student Attribute Count	Sport Count	Hold Count	Program	Degree	College	Major	Department	Minor	Concentration	Student Population	Campus	Site	Graduation Acad Period Intended	Academic Standing	Academic Standing End	Cumulative Overall GPA	Credits Earned
Abdul Baki, Nelly-200607710	Freshman	nbaki@act.com		0	0	0	0	B.A. History	Bachelor of Arts	College of Arts & Science	History	No Data	No Data	No Data	New First Time	Main	No Data	No Data	Good Standing	Good Standing	3.500	6.00
Bishop, Sharon-200607920	Freshman	sbishop@act.com	4197554761	0	0	0	0	B.A. History	Bachelor of Arts	College of Arts & Science	History	No Data	No Data	No Data	New First Time	Main	No Data	No Data	Good Standing	Good Standing	3.500	6.00

Academic Performance				Audit Block												Demographic				Financial Aid			Primary Advisor	
Academic Standing	Academic Standing End	Cumulative Overall GPA	Credits Earned	Block Type	Block Value	Minimum GPA	Block GPA	Percent Requirements Completed	Percent Credits Completed	Credits Required	Credits Applied	Credits Needed	Courses Required	Courses Applied	Courses Needed	Gender	Race Category Count	Veteran Category	Geographic Region Count	Financial Aid Awarded	Financial Aid Disbursed	Financial Aid Loan	Advisor Name	Advisor Type
Good Standing	Good Standing	3.500	6.00	Degree	BA block for ODS testing	0.000	3.500	3.08	0.05	126.00	6.00	120.00	0	2	0	Female	0		3	No	No	No	Instructor, Steve	Athletic Dept Advisor
				Major	Major HIST for ODS testing	2.000	0.000	0.00	0.00	60.00	0.00	60.00	0	0	0									
				Custom block	OTHER GENED for ODS testing	2.000	4.000	10.00	0.10	30.00	3.00	27.00	0	1	0									
				Fall-through courses	Fall-through courses	0.000	0.000	0.00	0.00	0.00	3.00	0.00	0	1	0									
				Over-the-limit courses	Over-the-limit courses	0.000	0.000	0.00	0.00	0.00	0.00	0.00	0	0	0									
				Insufficient courses	Insufficient courses	0.000	0.000	0.00	0.00	0.00	0.00	0.00	0	0	0									
Good Standing	Good Standing	3.500	6.00	Degree	BA block for ODS testing	0.000	3.500	3.08	0.05	126.00	6.00	120.00	0	2	0	Female	0		6	Yes	Yes	No	Instructor, Steve	Biology Advisor
				Major	Major HIST for ODS testing	2.000	0.000	0.00	0.00	60.00	0.00	60.00	0	0	0									
				Custom block	OTHER GENED for ODS testing	2.000	4.000	10.00	0.10	30.00	3.00	27.00	0	1	0									
				Fall-through courses	Fall-through courses	0.000	0.000	0.00	0.00	0.00	3.00	0.00	0	1	0									
				Over-the-limit courses	Over-the-limit courses	0.000	0.000	0.00	0.00	0.00	0.00	0.00	0	0	0									
				Insufficient courses	Insufficient courses	0.000	0.000	0.00	0.00	0.00	0.00	0.00	0	0	0									

Report package

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

Business Questions / Goals

This report answers the following business questions or goals:

1. Identify students close to graduation.

   It will assist in identifying students close to completing their outcome requirements in the next academic period.

2. Identify student in jeopardy of not meeting minimum GPA for courses applicable to their major, minor, or concentration by identifying students within a defined minimum GPA range, as they are at risk of not completing their degree.

   As an example, if the student has a minimum GPA requirement of 3.0 and their current GPA is 2.5 and they are in their last semester at school, they could be as risk of not meeting their minimum GPA with the few classes they have left to take.

3. Identify which students are ready to graduate and which students are at risk of not completing their outcomes that need to take a specific course this next academic period.

4. Identify students that may lose financial aid who are close to completing their outcome requirements.

Audit Student List Detail - report prompts

When executing a report, you must first identify the selection values for the data to be displayed on the report. These desired selection values are input on the prompt page which is the first page displayed when a report is chosen to be run.

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.

Some prompts are used to determine the values in other prompts. These are identified as cascading prompts. To cascade values, select values in the cascading prompt and click the icon. When other prompts are displayed, select desired values from those cascaded and click Finish.

Prompt	Description	Parameter
Audit Academic Period (*)	Select Audit Academic Period to specify which creation audit time period to use when selecting the data to display in the report.	p_Academic Period
Student Level (*)	Select a student level to specify the level associated with the students selected to be displayed in the report.	p_Student Level

Prompt	Description	Parameter
Audit Type (*)	Select Audit Type to specify which audit data to display in the report. A number of different audit types may be available depending on your institution's use of Degree Works. Academic Audit is the most common and will be the default selection value.	p_Audit Type

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.

The following table shows the list of Prompt values under Academic Study:

Prompt	Description	Parameter
Program	Select one or more programs to display in the report. Click  to cascade values to other prompts.	p_Program
College	Select one or more colleges to display in the report.	p_College
Department	Select one or more departments of study to display in the report.	p_Department
Degree	Select one or more degrees to display in the report.	p_Degree
Major	Select one or more major subjects of study to display in the report.	p_Major
Minor	Select one or more minor subjects of study to display in the report.	p_Minor
Concentration	Select one or more major areas of concentration to display in the report.	p_Concentration
Campus	Select one or more campuses to display in the report.	p_Campus
Site	Select one or more sites to display in the report.	p_Site
Graduation Academic Period Intended	Select one or more intended graduation academic periods to display in the report.	p_Grad Acad Period Intended

Audit Block Groupings

The Audit Block Groupings prompts let you filter the report based on a predetermined set of ranges that have institution specified values loaded into the ODS to determine student progress toward satisfying different sets of outcome requirements. An (*) indicates a required value.

Prompt	Description	Parameter
Block Type	Select one or more block types to display in the report. Click to cascade values to other prompts.	p_Block Type
Block Value	Select one or more block values to display in the report.	p_Block Value
Range % Requirements Completed	Select one or more percentage of requirements completed range to display in the report.	p_Require Percent Complete
Credits Needed Range	Select one or more ranges of credits needed to display in the report.	p_Credits Needed Range
Courses Needed Range	Select one or more ranges of courses needed to display in the report.	p_Courses Needed Range
Range % Credits Completed	Select one or more range percentage of credits completed to display in the report.	p_Credits Percent Complete
Credits Applied Range	Select one or more ranges of credits applied to display in the report.	p_Credits Applied Range
Courses Applied Range	Select one or more range of courses applied to display in the report.	p_Courses Applied Range
GPA Range	Select one or more GPA ranges to display in the report.	p_GPA Range

Demographic prompts

The Demographic 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

Prompt	Description	Parameter
Race Category	Select one or more race categories to display in the report.	p_Race Category
Citizenship Type	Select one or more citizenship types to display in the report.	p_Citizenship Type
Geographic Division	Select one or more geographic divisions to display in the report. Click to cascade values to other prompts.	p_Geographic Division
Geographic Region	Select one or more geographic regions to display in the report.	p_Geographic Region
Veteran Category	Select one or more veteran categories to display in the report.	p_Veteran Category

Academic Performance prompts

The Academic Performance prompts are optional prompts that you can use to filter the report based on characteristics of a student's academic performance such as cumulative overall GPA, total credits earned, and academic standing.

Prompt	Description	Parameter
Cum Overall GPA	Select a low and high value to identify the cumulative GPA values a student should have to display on the report.	p_Cum Overall GPA
Total Credits Earned	Select a low and high value to identify the total cumulative credits earned values a student should have to display on the report.	p_Total Credits Earned
Academic Standing Begin	Select one or more academic period begin academic standing values to display in the report.	p_Academic Standing Begin
Academic Standing End	Select one or more academic period end academic standing values to display in the report.	p_Academic Standing End

Student Groupings prompts

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

The following table shows the list of Prompt values under Student Groupings:

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 Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Student Population	Select one or more student populations to display in the report.	p_Student Population
Primary Advisor	Select one or more primary advisors to display in the report.	p_Primary Advisor
Sport	Select one or more sports to display in the report.	p_Sport
Sport Eligibility	Select one or more sports eligibility values to display in the report.	p_Sport Eligibility
Hold	Specify one or more hold reasons that may be assigned to a student to select the students to display on the report.	p_Hold

Financial Aid prompts

The Financial Aid prompts are optional prompts that you can use to filter the report based on the student's primary advisor, population, cohort, attribute and/or classification for the selected academic period and level.

Prompt	Description	Parameter
Financial Aid Awarded Ind		p_Financial Aid Awarded Ind
Financial Aid Disbursed Ind		p_Financial Aid Disbursed Ind

Prompt	Description	Parameter
Financial Aid Loan Ind		p_Financial Aid Loan Ind

Audit Student List Detail - report composition overview

The report composition overview provides a high level introduction to features used by Ellucian 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 Audit Student Course List Detail report. The following table specifies the drill-through parameter values for the Audit Student List Detail report. These are the parameter values that need to be passed from the Audit Student List Detail report to the Audit Student Course List Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Academic Period	Yes	Pass parameter value	p_Activity Category
p_Student Level	Yes	Pass parameter value	p_Student Level
drill_Fall Through Counts		Pass parameter value	p_Fall Through Counts
drill_Person UID		Pass data item value	Person UID
p_Academic Standing Begin		Pass data item value	Academic Standing
p_Academic Standing End		Pass data item value	Academic Standing End
p_Audit Type	Yes	Pass parameter value	p_Audit Type
p_Block Type		Pass data item value	Block Type
p_Block Value		Pass data item value	Block Value
p_Campus		Pass data item value	Campus
p_College		Pass data item value	College
p_Concentration		Pass data item value	First Concentration
p_Courses Applied Range		Pass parameter value	p_Courses Applied Range
p_Courses Needed Range		Pass parameter value	p_Courses Needed Range

Parameter	Required	Method	Value
p_Credits Applied Range		Pass parameter value	p_Credits Applied Range
p_Credits Needed Range		Pass parameter value	p_Credits Needed Range
p_Credits Percent Complete		Pass parameter value	p_Credits Percent Complete
p_Cum Overall GPA		Pass parameter value	p_Cum Overall GPA
p_Degree		Pass data item value	Degree
p_Department		Pass data item value	Department
p_GPA Range		Pass parameter value	p_GPA Range
p_Grad Academic Period Intended		Pass data item value	Grad Academic Period Intended
p_Hold		Pass parameter value	p_Hold
p_Major		Pass data item value	Major
p_Minor		Pass data item value	First Minor
p_Primary Advisor		Pass data item value	Advisor Name LFMI
p_Program		Pass data item value	Program
p_Require Percent Complete		Pass parameter value	p_Require Percent Complete
p_Sport		Pass parameter value	p_Sport
p_Sport Eligibility		Pass parameter value	p_Sport Eligibility
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 data item value	Student Population
p_Total Credits Earned		Pass parameter value	p_Total Credits Earned

Audit Student Course List Detail report

The Audit Student Course List Detail report lists courses for each student that have been taken based upon auditing block requirements for an audit academic period. It can be filtered by academic study characteristics, academic performance characteristics, audit block requirements, audit course, and student characteristics. This report would be used by the Advisor or Registrar to review courses applied or needed to satisfy outcome requirements as of an audit academic period for students based on the selection criteria specified.

Audit Student Course List Detail report does not drill on to any reports.

Audit Student Course List Detail

Fall 2006 for Undergraduate Academic Audit

Student				Academic Study										
Name	Student Classification	Email	Phone Number	Program	Degree	College	Major	Department	Minor	Concentration	Student Population	Campus	Site	Graduation Acad Period Intended
				Studies										
Hill, Craig P.- N00010099	Senior	chill@vubuniversity.com	01744730902	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	Theatre	Theatre	No Data	No Data	Continuing	Main	No Data	Session 2006-07
Hill, Craig P.- N00010099	Senior	chill@vubuniversity.com	01744730902	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	Theatre	Theatre	No Data	No Data	Continuing	Main	No Data	Session 2006-07
Hill, Craig P.- N00010099	Senior	chill@vubuniversity.com	01744730902	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	Theatre	Theatre	No Data	No Data	Continuing	Main	No Data	Session 2006-07
Hill, Craig P.- N00010099	Senior	chill@vubuniversity.com	01744730902	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	Theatre	Theatre	No Data	No Data	Continuing	Main	No Data	Session 2006-07
Hill, Craig P.- N00010099	Senior	chill@vubuniversity.com	01744730902	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	Theatre	Theatre	No Data	No Data	Continuing	Main	No Data	Session 2006-07
Hill, Craig P.- N00010099	Senior	chill@vubuniversity.com	01744730902	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	Theatre	Theatre	No Data	No Data	Continuing	Main	No Data	Session 2006-07
Hill, Craig P.- N00010099	Senior	chill@vubuniversity.com	01744730902	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	Theatre	Theatre	No Data	No Data	Continuing	Main	No Data	Session 2006-07

Audit Course																			Primary Advisor	
Block Type	Block Value	Audit Result Type	Academic Period	Course Reference Number	Course Identification	Student Course Attributes Count	Schedule Type	Instruction Method	Course Take Type	Block Rule Label	Course Credits	Course Credits DW	Final Grade	GPA Credits	GPA Quality Points	Course Passed Ind	Incomplete Grade Ind	Course Source	Advisor Name	Advisor Type
	ODS testing								be taken											
Custom block	OTHER GENED for ODS testing	Needed			WRLD101@		No Data	No Data	Course must be taken	Red Other World Civilizations								Not applicable	Brobyn, Tracy	Tutor
Fall-through courses	Fall-through courses	Fall-through	Session 2004-05		THEA100		No Data	No Data		NA	15	15	63	15	945	Y	N	Institution history course	Brobyn, Tracy	Tutor
Fall-through courses	Fall-through courses	Fall-through	Session 2004-05		THEA102		No Data	No Data		NA	15	15	66	15	990	Y	N	Institution history course	Brobyn, Tracy	Tutor
Fall-through courses	Fall-through courses	Fall-through	Session 2004-05		THEA103		No Data	No Data		NA	15	15	65	15	975	Y	N	Institution history course	Brobyn, Tracy	Tutor
Fall-through courses	Fall-through courses	Fall-through	Session 2004-05		THEA104		No Data	No Data		NA	15	15	66	15	990	Y	N	Institution history course	Brobyn, Tracy	Tutor
Fall-through courses	Fall-through courses	Fall-through	Session 2004-05		THEA107		No Data	No Data		NA	15	15	66	15	990	Y	N	Institution history course	Brobyn, Tracy	Tutor
Fall-through courses	Fall-through courses	Fall-through	Session 2004-05		THEA108		No Data	No Data		NA	15	15	63	15	945	Y	N	Institution history course	Brobyn, Tracy	Tutor

Report package

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

Goals

This report achieves the following goals:

1. Identify students close to graduation.

   What courses must the student take in order to complete their outcome requirements? The advisor or registrar will then ensure the student has planned appropriately for these classes in their schedule.

Audit Student Course List Detail - report prompts

When executing a report, you must first identify the selection values for the data to be displayed on the report. These desired selection values are input on the prompt page which is the first page displayed when a report is chosen to be run.

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.

Some prompts are used to determine the values in other prompts. These are identified as cascading prompts. To cascade values, select values in the cascading prompt and click the icon. When other prompts are displayed, select desired values from those cascaded and click Finish.

Prompt	Description	Parameter
Audit Academic Period (*)	Select Audit Academic Period to specify which creation audit time period to use when selecting the data to display in the report.	p_Academic Period
Student Level (*)	Select a student level to specify the level associated with the students selected to be displayed in the report.	p_Student Level
Audit Type (*)	Select 'Audit Type' to specify which audit data to display in the report. A number of different audit types may be available depending on your institution's use of Degree Works. Academic Audit is the most common and will be the default selection value.	p_Audit Type

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.

The following table shows the list of Prompt values under Academic Study:

Prompt	Description	Parameter
Program	Select one or more programs to display in the report. Click to cascade values to other prompts.	p_Program
College	Select one or more colleges to display in the report.	p_College
Department	Select one or more departments of study to display in the report.	p_Department
Degree	Select one or more degrees to display in the report.	p_Degree
Major	Select one or more major subjects of study to display in the report.	p_Major
Minor	Select one or more minor subjects of study to display in the report.	p_Minor
Concentration	Select one or more major areas of concentration to display in the report.	p_Concentration
Campus	Select one or more campuses to display in the report.	p_Campus
Site	Select one or more sites to display in the report.	p_Site
Graduation Academic Period Intended	Select one or more intended graduation academic periods to display in the report.	p_Grad Acad Period Intended

Audit Block Groupings prompts

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

Prompt	Description	Parameter
Block Type	Select one or more block types to display in the report. Click to cascade values to other prompts.	p_Block Type
Block Value	Select one or more block values to display in the report.	p_Block Value

Prompt	Description	Parameter
Range % Requirements Completed	Select one or more percentage of requirements completed range to display in the report.	p_Require Percent Complete
Credits Needed Range	Select one or more ranges of credits needed to display in the report.	p_Credits Needed Range
Courses Needed Range	Select one or more ranges of courses needed to display in the report.	p_Courses Needed Range
Range % Credits Completed	Select one or more range percentage of credits completed to display in the report.	p_Credits Percent Complete
Credits Applied Range	Select one or more ranges of credits applied to display in the report.	p_Credits Applied Range
Courses Applied Range	Select one or more range of courses applied to display in the report.	p_Courses Applied Range
GPA Range	Select one or more GPA ranges to display in the report.	p_GPA Range

Audit Course Groupings prompts

The Audit Course Groupings prompts are optional prompts that you can use to filter the report based on characteristics of a student course.

Prompt	Description	Parameter
Block Rule Label	Select one or more block rule label values to display in the report.	p_Block Rule Label
Audit Result Type	Select one or more audit result type values to display in the report.	p_Audit Result Type
Course Take Type	Select one or more course take type values to display courses in the report.	p_Course Take Type
Course Identification	Select one or more course identification values to identify the courses required by the students to be displayed in the report. Click to cascade values to other prompts.	p_Course Identification
Student Course Attribute	Select one or more course attributes to display in the report.	p_Course Attribute

Prompt	Description	Parameter
Schedule Type	Select one or more schedule types to display in the report.	p_Schedule Type
Instruction Method	Select one or more instruction methods to display in the report.	p_Instruction Method

Academic Performance prompts

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

Prompt	Description	Parameter
Cum Overall GPA	Select a low and high value to identify the cumulative GPA values a student should have to display on the report.	p_Cum Overall GPA
Total Credits Earned	Select a low and high value to identify the total cumulative credits earned values a student should have to display on the report.	p_Total Credits Earned
Academic Standing Begin	Select one or more academic period begin academic standing values to display in the report.	p_Academic Standing Begin
Academic Standing End	Select one or more academic period end academic standing values to display in the report.	p_Academic Standing End

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.

The following table shows the list of Prompt values under Student Groupings:

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

Prompt	Description	Parameter
Student Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Student Population	Select one or more student populations to display in the report.	p_Student Population
Primary Advisor	Select one or more primary advisors to display in the report.	p_Primary Advisor
Sport	Select one or more sports to display in the report.	p_Sport
Sport Eligibility	Select one or more sports eligibility values to display in the report.	p_Sport Eligibility
Hold	Specify one or more hold reasons that may be assigned to a student to select the students to display on the report.	p_Hold

Audit Student Non-Course List Detail report

The Audit Student Non-Course List Detail report lists non-courses requirements defined for each student selected for the report based on auditing block requirements that are not academic course work. It can be filtered by academic study characteristics, academic performance characteristics, audit block requirements, non-course characteristics, and student information characteristics.

This report would be used by the Advisor or Registrar to identify students who have a requirement to complete an outcome that does not include academic class participation.

Audit Student Non-Course List Detail report does not drill through to any reports.

Selected Prompts

Show/Hide Categories

- [x] Academic Study
- [x] Audit Non-Course
- [x] Advisor

Show/Hide

Audit Student Non-Course List Detail

Fall 2006 for Undergraduate Academic Audit

Student				Academic Study										
Name	Student Classification	Email	Phone Number	Program	Degree	College	Major	Department	Minor	Concentration	Student Population	Campus	Site	Graduation Acad Period Intended
[redacted]	[redacted]	[redacted]		B.A. History	Bachelor of Arts	College of Arts & Science	History				New First Time	Main		
[redacted]	[redacted]	[redacted]		B.A. History	Bachelor of Arts	College of Arts & Science	History				New First Time	Main		
[redacted]	[redacted]	[redacted]		B.A. History	Bachelor of Arts	College of Arts & Science	History				New First Time	Main		
[redacted]	[redacted]	[redacted]		B.A. History	Bachelor of Arts	College of Arts & Science	History				New First Time	Main		
[redacted]	[redacted]	[redacted]		B.A. History	Bachelor of Arts	College of Arts & Science	History				New First Time	Main		
[redacted]	[redacted]	[redacted]												

Audit Non-Course								Primary Advisor	
Block Type	Block Value	Audit Result Type	Academic Period	Non-Course	Non-Course Status	Course Take Type	Block Rule Label	Advisor Name	Advisor Type
Degree	BA block for ODS testing	Needed		Life issues/community service		Course must be taken	Life Issues or Community Service	Instructor, Steve	Athletic Dept Advisor
Degree	BA block for ODS testing	Needed		One year contracting		Course must be taken	Life Issues or Community Service	Instructor, Steve	Athletic Dept Advisor
Degree	BA block for ODS testing	Needed		Chapel (50 times or more)		Course must be taken	Chapel Attendance 50 times or more	Instructor, Steve	Athletic Dept Advisor
Degree	BA block for ODS testing	Needed		Medical Clearance		Course must be taken	Human Services	Instructor, Steve	Athletic Dept Advisor
Degree	BA block for ODS testing	Needed		Comprehensive Examination		Course must be taken	Human Services	Instructor, Steve	Athletic Dept Advisor

Report package

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

Business Questions / Goals

This report answers the following business question or goal:

1. What non-courses have been fulfilled by the student and must the student take in order to complete their outcome requirements? The advisor or the registrar will then ensure the student has planned appropriately.

   Goal: Identify students close to graduation.

Audit Student Non-Course List Detail - report prompts

When executing a report, you must first identify the selection values for the data to be displayed on the report. These desired selection values are input on the prompt page which is the first page displayed when a report is chosen to be run.

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.

Some prompts are used to determine the values in other prompts. These are identified as cascading prompts. To cascade values, select values in the cascading prompt and click the icon. When other prompts are displayed, select desired values from those cascaded and click Finish.

Prompt	Description	Parameter
Audit Academic Period	Select Audit Academic Period to specify which creation audit time period to use when selecting the data to display in the report.	p_Academic Period
Student Level	Select a student level to specify the level associated with the students selected to be displayed in the report.	p_Student Level
Audit Type	Select Audit Type to specify which audit data to display in the report. A number of different audit types may be available depending on your institution's use of Degree Works. Academic Audit is the most common and will be the default selection value.	p_Audit Type

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.

The following table shows the list of Prompt values under Academic Study:

Prompt	Description	Parameter
Program	Select one or more programs to display in the report. Click to cascade values to other prompts.	p_Program
College	Select one or more colleges to display in the report.	p_College
Department	Select one or more departments of study to display in the report.	p_Department
Degree	Select one or more degrees to display in the report.	p_Degree
Major	Select one or more major subjects of study to display in the report.	p_Major
Minor	Select one or more minor subjects of study to display in the report.	p_Minor
Concentration	Select one or more major areas of concentration to display in the report.	p_Concentration
Campus	Select one or more campuses to display in the report.	p_Campus
Site	Select one or more sites to display in the report.	p_Site
Graduation Academic Period Intended	Select one or more intended graduation academic periods to display in the report.	p_Grad Acad Period Intended

Audit Block Groupings prompts

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

Prompt	Description	Parameter
Block Type	Select one or more block types to display in the report. Click to cascade values to other prompts.	p_Block Type
Block Value	Select one or more block values to display in the report.	p_Block Value

Prompt	Description	Parameter
Range % Requirements Completed	Select one or more percentage of requirements completed range to display in the report.	p_Require Percent Complete
Credits Needed Range	Select one or more ranges of credits needed to display in the report.	p_Credits Needed Range
Courses Needed Range	Select one or more ranges of courses needed to display in the report.	p_Courses Needed Range
Range % Credits Completed	Select one or more range percentage of credits completed to display in the report.	p_Credits Percent Complete
Credits Applied Range	Select one or more ranges of credits applied to display in the report.	p_Credits Applied Range
Courses Applied Range	Select one or more range of courses applied to display in the report.	p_Courses Applied Range
GPA Range	Select one or more GPA ranges to display in the report.	p_GPA Range

Audit Non-Course Groupings prompts

The Audit Non-Course Groupings prompts are optional prompts that you can use to filter the report based on certain non-course characteristics.

Prompt	Description	Parameter
Block Rule Label	Select one or more block rule label values to display in the report.	p_Block Rule Label
Audit Result Type	Select one or more audit result type values to display in the report.	p_Audit Result Type
Non-Course	Select one or more non-course values to display in the report.	p_Non-Course
Course Take Type	Select one or more course take type values to display the type of courses taken in the report.	p_Course Take Type

Academic Performance prompts

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

Prompt	Description	Parameter
Cum Overall GPA	Select a low and high value to identify the cumulative GPA values a student should have to display on the report.	p_Cum Overall GPA
Total Credits Earned	Select a low and high value to identify the total cumulative credits earned values a student should have to display on the report.	p_Total Credits Earned
Academic Standing Begin	Select one or more academic period begin academic standing values to display in the report.	p_Academic Standing Begin
Academic Standing End	Select one or more academic period end academic standing values to display in the report.	p_Academic Standing End

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.

The following table shows the list of Prompt values under Student Groupings:

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 Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Student Population	Select one or more student populations to display in the report.	p_Student Population
Primary Advisor	Select one or more primary advisors to display in the report.	p_Primary Advisor

Prompt	Description	Parameter
Sport	Select one or more sports to display in the report.	p_Sport
Sport Eligibility	Select one or more sports eligibility values to display in the report.	p_Sport Eligibility
Hold	Specify one or more hold reasons that may be assigned to a student to select the students to display on the report.	p_Hold

Registration Plan reports

The reports based on the Registration Plan package/Business concept provide information that may be used in determining schedule of classes or timetable for an academic period based on registration plans developed by the student and student advisor to satisfy outcome audit requirements.

The following Report Studio reports are delivered in the **Banner Operational Data Store** > **Operational Data Store Reports** > **Reports** > **Registration Plan** folder under the **Public Folders** tab:

- Projected Plan Seat Count Summary
- Projected Plan Course List Detail

Projected Plan Seat Count Summary report

The Projected Plan Seat Count Summary report lists information about the courses defined in all student's registration plans for an academic period. It can be filtered on a variety of plan types, plan indicators, course administration characteristics as well as some student academic study and student group characteristics.

This report would be used by the Registrar or Department Dean to determine if the correct number of sections and seats are available for the student demand identified in the student registration plans.

From the Projected Plan Seat Count Summary report, you can drill into a specific course and the students who are requesting that course in the Projected Plan Course List Detail report.

Projected Plan Seat Count Summary

For Fall 2013

Selected Prompts

☑ Display Course Reference Number if exists

						Seat Count				
Course Identification	**Course Reference Number**	**Course Department**	**Course Level**	**Student Classification**	**Student Level**	**Projected**	**Maximum**	**Actual**	**Available**	**Prior**
ACCT014A	No Data	No Data	No Data	Freshman	Undergraduate	0				
ANTH194	No Data	No Data	No Data	Freshman	Undergraduate	0				
		Not Applicable	Undergraduate	Freshman	Undergraduate	2				
ANTH2010	No Data	Not Applicable	Undergraduate	Freshman	Undergraduate	6				
				Senior	Undergraduate	1				
		No Data	No Data	Senior	Undergraduate	0				
				Freshman	Undergraduate	0				
	14007	No Data	No Data	Freshman	Undergraduate	1	35	5	30	26
MATH105	No Data	Not Applicable	Undergraduate	Freshman	Undergraduate	1				
MATH110	14001	No Data	No Data	Freshman	Undergraduate	1	30	21	9	22
SPAN083S	No Data	No Data	No Data	Freshman	Undergraduate	0				
SPAN101	No Data	No Data	No Data	Freshman	Undergraduate	0				
THEA100	No Data	Not Applicable	Undergraduate	Senior	Undergraduate	1				
		No Data	No Data	Senior	Undergraduate	0				
THEA101	No Data	Not Applicable	Undergraduate	Senior	Undergraduate	1				
					Total	**33**	**65**	**26**	**39**	**48**

Report package

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

Business Questions / Goals

This report answers the following business questions:

1. How many students have this course identification (Subject/Course Number) listed for this academic period in their registration plan?
2. What courses and how many seats are required to allow students to meet graduation requirements based on their year of study?

Projected Plan Seat Count Summary - report prompts

When executing a report, you must first identify the selection values for the data to be displayed on the report. These desired selection values are input on the prompt page which is the first page displayed when a report is chosen to be run.

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.

Some prompts are used to determine the values in other prompts. These are identified as cascading prompts. To cascade values, select values in the cascading prompt and click the icon. When other prompts are displayed, select desired values from those cascaded and click Finish.

Prompt	Description	Parameter
Academic Period (*)	Select a single academic period to use when selecting the course data to display in the report.	p_Academic Period
Preferred Plan (*)	Select the plans identified as preferred or those that are not. Default is set to preferred plan.	p_Preferred Plan
Course Critical (*)	Select courses identified as critical and must complete within the academic period.	p_Course Critical
Locked (*)	Select only registration plans that are locked or are not locked to display data in the report. Default will be set to yes for locked.	p_Locked
Plan Data Origin (*)	Source system that created or updated data. Values permit the report to be run for Banner or Degree Works data or optionally both. Default will be set to Both.	p_Plan Data Origin

Course Category prompts

The Course Category prompts let you filter the report based on the prompt values entered. An (*) indicates a required value.

The following table shows the list of prompts under Course Category 1:.

Prompt	Description	Parameter
Course Identification	Select one or more course subject and course number combinations to determine the data to display on the report.	Course Identification
Course Subject	Select one or more main instructional subject area(s) display on the report.	p_Course Subject
Course Number	Select one or many course number associated with the subject area(s) selected in the previous prompt.	p_Course Number

Optionally, you may also select an option in the following course category. The following table shows the list of prompts under Course Category 2 of which two may be selected:

Prompt	Description	Parameter
Course Campus	Select one or more campus values to display on the report.	Drill Course Campus
Course College	Select one or more College, School, or Faculty responsible for the instruction of this course or section to display on the report.	Drill Course College
Course Department	Select one or more department values responsible for the instruction in the course or course offering to display in the report.	Drill Course Department

The following table shows the list of prompts under Course Category 3, optional selection of one prompt for each category is permitted, but all values within the selected will display on the report. Individual values within a prompt selection are not permitted on this summary report:

Prompt	Description	Parameter
Course Attribute	Select one or more course attributes to display in the report.	p_Course Attribute
Course Level	Select one or more course levels to display in the report.	Drill Course Level
Instruction Method	Select one or more instruction methods to display in the report.	p_Instruction Method
Schedule Type	Select one or more schedule types to display in the report.	p_Schedule Type

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. There are two categories of Student Groupings prompts:

- Student Groupings Category 1

- Student Groupings Category 2

Prompt	Description	Parameter
Student Group	Select any one of the preferred Student Characteristic values. This will display a second box with corresponding options for that value.	p_Student Group

The following table shows the list of prompts under Student Groupings Category 1 and 2. Optional selection of one prompt for each category is permitted but all values within the selected will display on the report. Individual values within a prompt selection are not permitted on this summary report.:

Prompt	Description	Parameter
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.	p_Student Cohort
Student Level	Select a student level to specify the level associated with the students selected to be displayed in the report.	p_Student Level

Projected Plan Seat Count Summary - report composition overview

The report composition overview provides a high level introduction to features used by Ellucian 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 Projected Plan Course List Detail report. The following table specifies the drill-through parameter values for the Projected Plan Course List Detail report. These are the parameter values that need to be passed from the Projected Seat Count Summary report to the Projected Plan Course List Detail report for the drill-through to work properly.

Parameter	Required	Method	Value
p_Course Subject	Yes	Pass parameter value	p_Course Subject

Parameter	Required	Method	Value
drill_Course Category2	Yes	Pass parameter value	p_Course Category2
drill_Course Category3		Pass parameter value	p_Course Category3
drill_Course Reference Number		Pass data item value	Course Reference Number
drill_SGC1_Student Attribute		Pass data item value	Drill SGC1 Student Attribute
drill_SGC1_Student Classification		Pass data item value	Drill SGC1 Student Classification
drill_SGC1_Student Cohort		Pass data item value	Drill SGC1 Student Cohort
drill_SGC1_Student Level		Pass data item value	Drill SGC1 Student Level
drill_SGC2_Student Attribute		Pass data item value	Drill SGC2 Student Attribute
drill_SGC2_Student Classification		Pass data item value	Drill SGC2 Student Classification
drill_SGC2_Student Cohort		Pass data item value	Drill SGC2 Student Cohort
drill_SGC2_Student Level		Pass data item value	Drill SGC2 Student Level
drill_Student Group Category1		Pass parameter value	p_Student Group Category1
drill_Student Group Category2		Pass parameter value	p_Student Group Category2
p_Academic Period		Pass parameter value	p_Academic Period
p_Course Attribute		Pass data item value	Drill Course Attribute
p_Course Campus		Pass data item value	Drill Course Campus
p_Course College		Pass data item value	Drill Course College
p_Course Critical		Pass parameter value	p_Course Critical
p_Course Department		Pass data item value	Drill Course Department
p_Course Identification		Pass data item value	Course Identification

Parameter	Required	Method	Value
p_Course Level		Pass data item value	Drill Course Level
p_Course Number		Pass parameter value	p_Course Number
p_Instruction Method		Pass data item value	Drill Instruction Method
p_Locked		Pass parameter value	p_Locked
p_Plan From	Yes	Pass parameter value	p_Plan From
p_Preferred Plan		Pass parameter value	p_Preferred Plan
p_Scheduled Type		Pass data item value	Drill Scheduled Type
p_Course Category1	Yes	Pass parameter value	p_Course Category1

Projected Plan Course List Detail report

The Projected Plan Course List Detail report provides the ability to list all students intending to take a course based upon their plan.

This report would be used by the Registrar or the Department Dean in planning the course offerings for the academic period.

Projected Plan Course List Detail report does not drill on to any reports.

Projected Plan Course List Detail

Planned Course				Course Information									Student			Academic Study						
Course Identification	Course Level	Course Attribute	Schedule Type	Course College	Course Department	Course Campus	Course Credits	Grade Type	Course Active	Course Locked	Course Critical	Plan Group Type	Name	Student Classification	Email	Program	Degree	College	Student Population	Campus	Site	Graduation Acad Period Intended
ANTH194	Undergraduate	No Data	No Data	Not Applicable	Not Applicable	No Data	3	Not Applicable	Y	Y	N	Union within group	[redacted]	[redacted]	[redacted]	Anthropology	Bachelor of Arts	College of Arts & Science	Returning	Main	No Data	No Data
ANTH2010	Undergraduate	No Data	No Data	Not Applicable	Not Applicable	No Data	3	Not Applicable	Y	N	N	Union within group	[redacted]	[redacted]	[redacted]	Anthropology	Bachelor of Arts	College of Arts & Science	New First Time	Main	No Data	No Data
	Undergraduate	No Data	No Data	Not Applicable	Not Applicable	No Data	3	Not Applicable	Y	N	N	Union within group	[redacted]	[redacted]	[redacted]	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	New First Time	Main	No Data	No Data
	Undergraduate	No Data	No Data	Not Applicable	Not Applicable	No Data	3	Not Applicable	Y	N	N	Union within group	[redacted]	[redacted]	[redacted]	BA Theatre Studies	Bachelor of Arts	Faculty of Arts	New First Time	Main	No Data	No Data
	Undergraduate	No Data	No Data	Not Applicable	Not Applicable	No Data	3	Not Applicable	Y	Y	N	Union within group	[redacted]	[redacted]	[redacted]	Anthropology	Bachelor of Arts	College of Arts & Science	Returning	Main	No Data	No Data
ANTH2020	Undergraduate	No Data	No Data	Not Applicable	Not Applicable	No Data	3	Not Applicable	Y	N	N	Union within group	[redacted]	[redacted]	[redacted]	Anthropology	Bachelor of Arts	College of Arts & Science	New First Time	Main	No Data	No Data

Academic Study - Concentrations									Academic Study - Minors				Primary Advisor		Student Information				
1st Major Concentration 1	1st Major Concentration 2	1st Major Concentration 3	2nd Major Concentration 1	2nd Major Concentration 2	2nd Major Concentration 3	3rd Major Concentration 1	3rd Major Concentration 2	3rd Major Concentration 3	Minor 1	Minor 2	Minor 3	Minor 4	Advisor Name	Advisor Type	Hold Type	Hold Origin	Sport	Student Attribute	Student Cohort
No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	Harvey, Campbell	Major	No Data	No Data	No Data	No Data	No Data
No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	Harvey, Campbell	Major	Balance Due	No Data	No Data	No Data	1998 New Freshmen
No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	Brobyn, Tracy	Tutor	Balance Due	No Data	No Data	No Data	No Data
No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	Brobyn, Tracy	Tutor	Graduation Hold	Finance and Billing	No Data	No Data	No Data
No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	Harvey, Campbell	Major	No Data	No Data	No Data	No Data	No Data
No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	Harvey, Campbell	Major	Balance Due	No Data	No Data	No Data	1998 New Freshmen

Report package

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

Goals

This report answers the following business questions or goals:

1. How many students have this course identification (Subject/Course Number) listed for this academic period in their registration plan?
2. Determine the total number of seats required for each course as requested by either a Banner XE Registration Plan or a Degree Works Plan.
3. Determine the total number of seats required for each course based upon the number of students by program and student classification (by year of study). In particular what courses and how many seats are required to allow students to meet graduation requirements based on their year of study?

4. Which students have a plan that needs to be updated because it is not locked or approved? Or older than the acceptable time frame?

Projected Plan Course List Detail - report prompts

When executing a report, you must first identify the selection values for the data to be displayed on the report. These desired selection values are input on the prompt page which is the first page displayed when a report is chosen to be run.

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.

Some prompts are used to determine the values in other prompts. These are identified as cascading prompts. To cascade values, select values in the cascading prompt and click the icon. When other prompts are displayed, select desired values from those cascaded and click Finish.

Prompt	Description	Parameter
Academic Period (*)	Select a single academic period to use when selecting the course data to display in the report.	p_Academic Period
Preferred Plan (*)	Select the plans identified as preferred or those that are not.	p_Preferred Plan
Course Critical (*)	Select courses identified as critical and must complete within the academic period.	p_Course Critical
Locked (*)	Select only registration plans that are locked or are not locked to display data in the report.	p_Locked
Plan Data Origin (*)	Source system that created or updated data. Values permit the report to be run for Banner or Degree Works data or optionally both.	p_Plan Data Origin

Course Groupings prompts

The Course Groupings prompts let you filter the report based on the course categories a student is part of. An (*) indicates a required value.

Prompt	Description	Parameter
Course Identification	Select one or more course identifications to display in the report.	Course Identification

Prompt	Description	Parameter
Course Subject	Select one or more subject areas to display on the report.	p_Course Subject

Course Administrative Grouping prompts

The Course Administrative Groupings prompts let you filter the report based on the course categories a student is part of. An (*) indicates a required value.

Prompt	Description	Parameter
Course Number	Select one or more course numbers within the subject areas selected to display on the report.	p_Course Number
Course Campus	Select one or more course campuses to display in the report.	Course Campus
Course College	Select one or more course colleges to display in the report.	Course College
Course Department	Select one or more course departments to display in the report.	Course Department
Course Attribute	Select one or more course attributes to display in the report.	p_Course Attribute
Course Level	Select one or more course levels to display in the report.	Course Level
Instruction Method	Select one or more instruction methods to display in the report.	p_Instruction Method
Schedule Type	Select one or more schedule types to display in the report.	p_Schedule Type

Academic Study prompts

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

Prompt	Description	Parameter
Academic Study	Select any one of the preferred Academic Study Characteristic values. This will display a second box with corresponding options for that value.	p_Academic Study

The following table shows the list of prompts under Academic Study:

Prompt	Description	Parameter
Primary Program (*)	Select one or more programs to display in the report. Click  to cascade values to other prompts.	p_Program
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
Department	Select one or more departments of study to display in the report.	p_Department
Degree	Select one or more degrees to display in the report.	p_Degree
Major	Select one or more major subjects of study to display in the report.	p_Major
Minor	Select one or more minor subjects of study to display in the report.	p_Minor
Concentration	Select one or more major areas of concentration to display in the report.	p_Concentration
Campus	Select one or more campuses to display in the report.	p_Campus
Site	Select one or more sites to display in the report.	p_Site
Graduation Academic Period Intended	Select one or more intended graduation academic periods to display in the report.	p_Grad Acad Period Intended

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 Group	Select any one of the preferred Student Characteristic values. This will display a second box with corresponding options for that value.	p_Student Group

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 Attribute	Select one or more student attributes to display in the report.	p_Student Attribute
Primary Advisor	Select one or more primary advisors to display in the report.	p_Primary Advisor
Student Level	Select a student level to specify the level associated with the students selected to be displayed in the report.	p_Student Level
Sport	Select one or more sports to display in the report.	p_Sport
Sport Eligibility	Select one or more sports eligibility codes to display in the report.	p_Sport Eligibility

Self-Service Reporting

Self-Service Reporting (SSR) provides simple, ad hoc access to information within Banner ODS.

SSR is delivered with report templates that provide examples of various common data retrieval needs across your institution. Each report template is based on the functional data relationships set forth in the Business Concept Diagrams found in Banner ODS published meta data. The template design for SSR uses a Filter - List - Detail approach.

This approach includes a Search Criteria page where you select the various filters for executing a query, a List page that displays the results of that query, and a Detail Reports page where you access additional information specific to any individual result on the List page.

The information on the List and Detail Reports pages can be viewed online or exported to a .csv file (Microsoft Excel format, for example) or XML file for printing or additional manipulation. The Email icon enables you to send email to everyone on the List page. If you select an individual address from the List page, you can send email to that individual. Optionally, the search criteria may be saved as a Search Rule.

You can save a set of defined search criteria filters for a report template as a search rule for future use. For select templates, you can also save the unique primary identifier(s) for your List page results to Banner ODS as a population to use in custom reports developed with your third party reporting tool.

The following tasks are available to help you create a self-service report:

- View, select and execute search criteria
- View, sort, email or export the List results
- View, sort, or export Detail reports
- Create, view, rename, change criteria for, or delete a Search Rule

For a Search Rule, optionally save the unique primary identifier(s) for a result set to Banner ODS using Population Selection

Before you can use the SSR, you *must* set up security. SSR requires authentication and authorization access to your Oracle database security. See the “Security” on page 324 section at the end of this chapter for additional information.

Note: By default, SSR uses Oracle user accounts for authentication and authorization. If you choose to use this default, then SSR will adhere to all Business Profiles and Fine Grain Access Security rules established for your Banner ODS users. Therefore, the data results returned for any SSR report template mirror the accessible data as defined for that SSR/Banner ODS user.
If an SSR report template uses a particular Banner ODS Reporting view to which a user has been denied access via your Oracle Access Controls, then the entire report template is not accessible to the user.

Navigation Quick Reference

All SSR web pages use the same basic navigation techniques. The following table describes each navigation feature. You may want to print this page until you become familiar with how to navigate throughout the web pages.

This navigation. . .	Does this . . .
 View this Population Selection icon	Used to maintain Banner ODS populations. • When selected from the top right corner of the home page: Opens the View Search Rules window showing all search rules with existing Banner ODS populations, for all templates. • When selected from the View Search Rules window, it opens the Population Detail window for the specified search rule.
Home link	Returns you to the Home page.
Help link	Opens the help pages.
Breadcrumbs	Located at the top of the page, below the tabs. These indicate the levels you passed through to arrive at the current page. *Example* Home>Student Templates>Advisor’s Student Search Criteria>Advisor’s Student List Select any breadcrumb level to return to that level.
Subject Area tabs at the top	To access a different subject area, select that tab at the top of the page.
Headings that are underlined	On the Search Criteria page, select any headings that are underlined (for example, any of the individual search criteria filter headings) to open the online help window. The help contains either instructional or meta data related information. On the List and Detail Reports pages, any underlined column headings can be selected to resort the results in ascending or descending order.
 Go to Search Rule icon	Select to load, view or maintain an existing search rule. Opens the View Search Rules window showing all existing search rules for the report template in context.
 Save Search Rule and Run Population Selection icon	Select to save a new, or resave an existing search rule. Opens the Save Search Rule window with optional save/refresh Banner ODS population functionality.

This navigation. . .	Does this . . .
Search button	Executes a query based on the selected search criteria filters.
Reset Search button	Resets all search criteria filters to their default state.
Show link	Displays filters for any search criteria category.
Hide link	Hides all sets of grouped search criteria categories.
>	Shows or hides an individual set of grouped search criteria filters for a report template.
Show SQL button	Select to view the actual SQL used to execute a query on the Search Criteria page. Select from the Detail Reports page to view the actual SQL used to generate the detail reports on the Detail Reports page. This button only appears if you have been granted access. See the “Customize Parameters” section of the SSR Installation Guide to allow or deny access for all users or individual users.
View Detail icon	Opens the Detail Reports page for the displayed list results or the Search Rule Detail window.

Search Criteria Page

The Search Criteria page is the filter portion of a report template. You can use this page to review and select the filters or search criteria on which to report.

Filters are grouped into logical search criteria categories. Each filter label is hyperlinked to Banner ODS meta data providing reporting view and column source information for each filter.

When you access a report template, it opens in its default state with a Search Rule setting of none. You can create a new query by selecting the desired search criteria filters, or load a previously saved query (see “Search Rules” on page 298 section). When finished, select the **Search** button to execute the query.

The Search Criteria page retains all defined filters as long as the report template is within a current session (moving between Search Criteria, List and Detail Reports pages). This allows you to easily alter or add search criteria. If you want to execute a different query, select the **Reset Search** button to clear all filter selections and return the Search Criteria page to its default settings or load a different Search Rule.

Note: To select multiple, random values from a list box, select the first value, then hold down the **Ctrl** key while selecting the remaining values.

To select multiple values in sequence from a list box, select the first criteria then hold down the **Shift** key and select the last criteria.

A list box with a (defaulted) value of ‘ALL’ means the filter is ignored, unless a value/values are selected.

For Range filters, leaving either range blank acts as a wildcard.

The following options are available from the Search Criteria pages:

- View and select the desired search criteria filters and execute a query
- Save, load, modify or delete search rules and optionally save, refresh or delete Banner ODS Populations for the template in context (See the “Search Rules” on page 298 section)
- View the SQL used to execute a defined query and generate the List Page report

Recommended and Required Search Criteria

Some report templates include a Recommended Search Criteria category that contains the filters most commonly selected when using a particular template. These may also include one or more 'required’ filters. A required filter must be selected to execute a query. Examples of required filters are Academic Periods or Chart of Accounts.

Note: Required filters are preceded with an asterisk.

Dependant Search Criteria Filters

Several report templates contain one or more list of values (LOV) filters that must be manually populated after you select a required filter. To load these filters for use in your query, choose your value(s) for the required filter and select the **Populate Search Criteria for…** button. You need to reload these filters any time you change the corresponding required filter for a new query. See the “Report Templates” on page 306 section for additional information.

Note: In their default state, dependant filters will display the following: “Select [required filter name] and Populate.”

List of Values Search Criteria Filters

The list of values (LOV) search criteria filters found in the various SSR reporting templates contain a set of valid values for a corresponding column in a Banner ODS reporting view. These filters are generated from a series of LOV views contained within the ODSLOV schema within Banner ODS. The ODSLOV views obtain their information from Banner

ODS composite table called MGT_VALIDATION, which in turn is populated with validation table values found in your Banner database.

Since these LOV filters are sourced from your Banner validation tables, querying on certain values may produce no results, if those value(s) are not currently associated with any records in your Banner ODS database.

Show SQL

Select the **Show SQL** button to view the actual SQL used to execute a query on the Search Criteria page, and to display the SQL in a pop-up window. This button only appears if you have been granted access. See the “Customize Parameters” section of the SSR Installation Guide to allow or deny access for all users or individual users.

List Page

The List page shows the results of the query that was executed on the Search Criteria page, and includes a predefined set of information for each result. The following procedures can be performed from this page:

- View and sort the results
- Export the List page report as a .csv file (Microsoft Excel format, for example) or an .xml file (except for the Employee List page)
- Send emails
- Save, load, modify or delete search rules and optionally save, refresh or delete Banner ODS Populations for the template in context (See the“Search Rules” on page 298 section)
- Change the ‘Records Per Page’ display setting
- Display the Search Criteria used to generate the List page results
- Access the Detail Reports page

Export

List results can be saved to format, print or further manipulate in another reporting tool by exporting the results as a .csv file (Microsoft Excel format, for example) or an .xml file. Select the **Excel** icon (for a .csv file) or the **XML** icon (for another application). The File Download window opens. Indicate whether you want to save or open the file.

Note: Some List page reports contain significantly more columns of information when they are exported to .csv and .xml files than are viewable on the web page. Review the “Report Templates” section for information specific to each template.

Email

The email option enables you to send an email message to any individual on the List page, or to send an email to the entire list. Each option is explained below:

Individual

To send an email to an individual on the List page, select the email address link in the **Email Address** column for that person. Your local email program opens with the individual’s email address already entered.

Entire List

To send an email to the entire list, select the envelope icon at the top of the List page. The SSR email utility opens. All recipient email addresses (the individuals on the list report) load into the **Blind Copy** field to ensure that recipients’ cannot see the other email addresses on the distribution list. If you have set up each SSR user as an APEX user, then the user’s email address loads into the **To** field. If you are not using the APEX user accounts, the user must manually enter (their) email address in the **To** field.

Sort

Any underlined column in the list report can be used to toggle between sorting the results in ascending or descending order. Select the column name by which you want to sort. An up arrow appears if the column is sorting in ascending order. A down arrow appears if the column is sorting in descending order.

Records Per Page (Display Setting)

The List page displays the total count of all records found for any given query as well as a “Records Per Page” display setting. This setting indicates the maximum number of records to be displayed on the List page.

If the total records returned for a query exceeds the Records Per Page display setting, a sequence of pagination links appear above the List results page. You must select the pagination link to retrieve the (next) set of results. If the total records returned for a query is less than the Records Per Page display setting, all records appear in the List results page.

This feature helps query performance, or more specifically, the amount of time it takes to render the results for HTML display. The delivered default display setting is 100 records per page. This default setting can be changed at the institution level. You may also change the display setting for your current session by selecting the **Records Per Page** hyperlink.

Note: This display setting applies to the HTML List page only. The .csv/ .xml export and Banner ODS Population features save all results, as applicable.

Access Detail Reports

Each report template provides detail reports for all results displayed on the List page. To drill to the Detail Reports page, select in the left column for any result on the list report.

Note: For the Finance templates (in addition to the View Detail icon) you can also drill into the respective detail reports by clicking the hyperlinked amount totals in the result set.

Detail Reports Page

The Detail Reports page displays all reports for the result selected from the List page. The following procedures can be performed from this page:

- Review the detail reports for the result selected from the List page and select a different detail report
- Export a detail report as a .csv file (Microsoft Excel format, for example)
- View the SQL used to generate the detail reports

Detail Reports Drop-down List

The Detail Reports page has a drop-down list located at the top of the page. Use this list to select and display any individual detail report.

Sort

Any underlined column in a detail report can be used to toggle between sorting the results in ascending or descending order. Select the column name by which you want to sort. An up arrow appears if the column is sorting in ascending order. A down arrow appears if the column is sorting in descending order.

Export

Detail reports can be saved as a .csv file to format, print or further manipulate in another reporting tool. Select the **Excel** icon. The File Download window opens. Indicate whether you want to save or open the file.

Note: On the Detail Reports page, only reports with an Excel icon can be exported. This option is provided for any report that can display more than one row of information.

Some Detail reports may contain more columns of information when they are exported than are viewable on the web page. Review the “Report Templates” on page 306 section for details about each template.

Query Search Criteria

Self-Service Reporting (SSR) provides ad hoc access to information within Banner ODS. You can use the report templates to access commonly retrieved data from across your institution. Each report template is based on the functional data relationships set forth in the Business Concept Diagrams found in Banner ODS published meta data.

You can query search criteria on a one time basis or saved as a search rule for future reuse. See “Search Rules” on page 298“Search Rules” on page 298 for additional information.

1. Select a business area from the Home page.
2. Select a template.
3. Select your search criteria filters From the Search Criteria page.

   The Search Criteria page opens. Use this page to review and select the filters or search criteria on which to report.

   For additional information on how to move throughout the SSR pages, see the “Navigation Quick Reference” on page 291.
4. Click **Search**.

   The List page opens showing the results of the query that was executed on the Search Criteria page. It includes a predefined set of information for each result. From this point, you can continue to:

   - View, select and execute search criteria
   - View, sort, email or export the List results
   - View, sort or export Detail reports

Search Rules

Self-Service Reporting (SSR) enables you to select information that you frequently search on within a template (called search criteria filters), then name and save the filters as a search rule under a user-defined name. This makes it easy to reuse sets of search criteria filters.

> **Note:** You can only access the search rules that are saved under your user name.

You also have the option to indicate whether to create/refresh Banner ODS populations each time you save a search rule. See “Banner ODS Populations” on page 301 for additional information.

Create and Save a Search Rule

Use this procedure to save groups of search criteria that you want to reuse. Search rules can be created from the Search Criteria page or from the List page.

Populations can also be created for search rules. See “Banner ODS Populations” on page 301 for additional information on Banner ODS populations.

1. Select a business area from the Home page.
2. Select a template.
3. Select your search criteria filters from the Search Criteria page.
4. Click . (The Save Search Rule and Run Population Selection icon is also available from the List page.)
5. Enter the name of the search rule,
6. (optional) Select the **Create/Refresh Banner ODS Population** check box to save the Banner ODS population for this search rule.

   See “Banner ODS Populations” on page 301 for additional information on Banner ODS populations.

   > **Note:** Populations cannot be saved for the Finance templates.

7. Click **Save**.

Load a Search Rule

Use this procedure to load and display a different search rule. Search rules can be loaded from the Search Criteria page or from the List page. (If a population exists for the search rule, then the page can also be accessed using the View this Population Selection icon on the Home page. See “Banner ODS Populations” on page 301 for additional information.)

1. Select a business area from the Home page.
2. Select a template.
3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)
4. Select the search rule to load.

   The Search Criteria page returns automatically with the search rule loaded.

Update a Search Rule

Update a search rule after you have changed or added search criteria filters for an existing rule, and want to save those changes.

1. Select a business area from the Home page.
2. Select a template.
3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)
4. Select the search rule you want to update.

   The screen returns to the Search Criteria page with the rule loaded.

5. Change the search criteria filters.
6. Click . (The Save Search Rule and Run Population Selection icon is also available from the List page.)

   The Save a Search Rule window opens.

7. (optional) Select the **Create/Refresh Banner ODS Population** check box. See “Banner ODS Populations” on page 301 for additional information on Banner ODS populations.

   Note: If the existing search rule has a population saved to Banner ODS, you *must* select the **Create/Refresh Banner ODS Population** check box to update and refresh the population. If this box is not selected for an existing search rule, any previously saved population is deleted. See “Banner ODS Populations” on page 301 for additional information on Banner ODS populations.

   Note: Populations cannot be saved for the Finance templates.

8. Click **Save**.

Save as Another Search Rule (Save As)

Use this procedure to create a new search rule with the same search criteria as an existing search rule, but with a different name.

1. Select a business area from the Home page.
2. Select a template.
3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)
4. Select the search rule you want to load and save under a different name.

   The screen returns to the Search Criteria page with the rule loaded.
5. Click . (The Save Search Rule and Run Population Selection icon is also available from the List page.)

   The Save a Search Rule window opens.
6. Enter the new name.
7. (optional) Select the **Create/Refresh Banner ODS Population** check box. See “Banner ODS Populations” on page 301 for additional information on Banner ODS populations.

   Note: If the existing search rule has a population saved to Banner ODS, you *must* select the **Create/Refresh Banner ODS Population** check box to also save a population for this rule. See “Banner ODS Populations” on page 301 for additional information on Banner ODS populations.

   Note: Populations cannot be saved for the Finance template.
8. Click **Save**.

Rename a Search Rule

Use this procedure to change the name of an existing search rule. You do not have to load the search rule to rename it.

Search rules are renamed from the Search Rule Detail window which can be accessed from the View Search Rules window. If a population exists for the search rule, then the page can also be accessed from the Home page. (See “Banner ODS Populations” on page 301 for additional information.)

1. Select a business area from the Home page.
2. Select a template.
3. Click from the Search Criteria page. (The Go to Search Rule icon is also available on the List page.)

4. Click to open the Search Rule Detail window.

   Note: If the rule has a population, you can also click the from the Home page to open the View Search Rules window. See “Banner ODS Populations” on page 301 for additional information.

5. Enter the new name in the **Rule Name** field.
6. Click **Rename**.

   The search rule is saved under the new name.

Delete a Search Rule

Use this procedure to delete an existing search rule. Search rules are deleted from the View Search Rules window or from the Search Rule Detail window. (If a population exists for the search rule, then the page can also be accessed from the Home page. See “Banner ODS Populations” on page 301 for additional information.)

Note: If you delete a search rule with Banner ODS a Banner ODS population, you also delete the populations.

1. Select a business area from the Home page.
2. Select a template.
3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)
4. Use any of the following methods from the View Search Rules window:
   - Click **Delete** to remove the search rule
   - Click to delete the search rule from the Search Rule Detail window
5. From the corresponding Detail window, click **Delete** and indicate that you want to delete the rule.

   The search rule is deleted.

Banner ODS Populations

Banner ODS populations are predefined primary identifier(s) found within List page results that can be saved to Banner ODS to populate reports developed using a third party reporting tool. (See “Use Populations with Banner ODS” on page 305 for information on retrieving population detail from the ODS_Population reporting view in Banner ODS.)

Below is a list of Banner ODS population characteristics:

- Finance report templates cannot save populations.
- Banner ODS population is optional, and can be disabled when SSR is installed
- Populations are associated with a search rule.
- A search rule must be created before you can create a Banner ODS population for that rule. (See “Create and Save a Search Rule” on page 298 for additional information.)
- Only one population is allowed per search rule
- Populations can be used for custom reporting with other reporting tools against the Banner ODS.
- Populations cannot be reused within SSR.

Create Banner ODS Populations

Use this procedure to create populations for a search rule. You can create populations while you are creating the search rule, or from any page or window that contains a icon.

Prerequisites

A search rule must be created before you can create Banner ODS populations for that rule. See “Create and Save a Search Rule” on page 298 for additional information.

Create a Population with a Search Rule Loaded

1. Select a business area from the Home page.
2. Select a template.
3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)
4. Select the search rule to load.

   The Search Criteria page returns automatically with the search rule loaded.
5. Click on the Search Criteria page. (The Save Search Rule and Run Population Selection icon is also available from the List page.)
6. Select the **Create/Refresh Banner ODS Population** check box.
7. Click **Save**.

   The population is added to the selected search rule.

Create a Population without a Search Rule Loaded

1. Select a business area from the Home page.
2. Select a template.

3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)

4. Select in the **Populations Details** column that corresponds to the search rule for which you want to create a population.

   The number next to the indicates the number of rows of populations available for that search rule. If this number is zero, then a **Create** button displays on the Banner ODS Population Detail window. (If rows are available, then the displayed buttons are **Refresh**, **Delete** and **SQL** display.)

5. Click **Create**.

   A population is created for the search rule.

Refresh (Update) Banner ODS Populations

Use this procedure to refresh a population because information has been added or removed (for example, alumni were added). Three possible ways to refresh your populations appear below.

Prerequisites

At least one population must exist for a search rule. See "Create Banner ODS Populations" on page 302 for additional information.

Refresh with a Search Rule Loaded

1. Select a business area from the Home page.

2. Select a template.

3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)

4. Select the search rule to load.

   The Search Criteria page returns automatically with the search rule loaded.

5. Click on the Search Criteria page. (The Save Search Rule and Run Population Selection icon is also available from the List page.)

6. Select the **Create/Refresh Banner ODS Population** check box.

7. Click **Save**.

   The population is refreshed for the selected search rule.

Refresh without a Search Rule Loaded

1. Select a business area from the Home page.

2. Select a template.

3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)

4. Click the that corresponds to the search rule whose population you want to refresh.

5. Click **Refresh**.

   The population is refreshed (updated).

Refresh from the Home page

1. Click in the upper right hand corner of the page.

2. Click the that corresponds to the search rule whose population you want to refresh.

3. Click **Refresh**.

   The population is refreshed (updated).

Delete a Banner ODS Population

Use this procedure to delete a population associated with a search rule.

Note: Deleting the population does not delete the associated search rule.

Two possible methods of deleting a population appear below.

Delete with a Search Rule not Loaded

1. Select a business area from the Home page.

2. Select a template.

3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)

4. Click the that corresponds to the search rule whose population you want to delete.

5. Click **Delete**.

   The population is deleted.

Delete from the Home page

1. Click in the upper right hand corner of the Home page.

2. Click the that corresponds to the search rule whose population you want to delete.

3. Click **Delete**.

   The population is deleted.

Use Populations with Banner ODS

Banner ODS populations contain the predefined primary identifier(s) for the List page results of any given report template query. These populations can be saved to Banner ODS and used for generating reports developed using a third party reporting tool. (See “Banner ODS Populations” on page 301 for additional information.)

Banner ODS contains a schema called SSRMGR. The tables in this schema store search rule and population data. A view in this schema, called ODS_POPULATION, contains the unique identifiers for each saved population along with the distinguishing characteristics of the corresponding search rule and user.

The search rule parameters below are required to retrieve a population from the ODS_POPULATION view for reporting purposes. They are used in the sql statement to retrieve the desired population.

- TEMPLATE_NAME
- RULE_NAME
- USER_ID

The **SQL** button in the Banner ODS Population Detail window generates a SQL statement containing these parameters that can be used to retrieve a saved population from the ODS_POPULATION reporting view.

Access from the View Search Rules Page

1. Select a business area from the Home page.
2. Select a template.
3. Click from the Search Criteria page. (The Go to Search Rule icon is also available from the List page.)
4. Click the link that corresponds to the search rule whose population you want to select.
5. Click **SQL**.

   The unique identifiers for the saved population and the characteristics of the corresponding search rule and user display. You can use this information to create additional reports.

Access from the Home page

1. Click in the upper right hand corner of the Home page.
2. Click the that corresponds to the search rule whose population you want to select.
3. Click **SQL**.

   The unique identifiers for the saved population and the characteristics of the corresponding search rule and user display. You can use this information to create additional reports.

Report Templates

This section contains the following information for each delivered report template:

- Search criteria
- List reports
- Detail reports
- Notes

Accounts Receivable Report Templates

Use the Accounts Receivable report template to obtain reports from Receivable Customer.

Receivable Customer

Use this report template to:

- Obtain a list of students or organizations and their current balances
- Obtain a list of students or organizations that have transactions that meet a specific transaction category within an academic period
- Determine which students that have holds on their accounts or have bills due within a specific date range
- Obtain a list of students or organizations that have a range of current amounts dues on their account
- Determine current balances of accounts where students are in specific programs, departments, degrees and majors
- Determine the contracts or exemptions with which a student is associated or an organization is associated
- Review all charges and payments on a students or organization's account
- Review the accounting information sent to Finance for all charges, payments, and application of payments for a selected student or organization

Search Criteria

Required Search filters: At least one Academic Period

Recommended Search filters: Category Detail Code, or Source

Search Criteria Notes

Certain list of values (LOV) search criteria filters in this template require the selection of one or more Academic Periods to display a specific list of values for that filter. To load these filters to use in your query, choose the desired Academic Period(s) and select the **Populate Search Criteria for Academic Period(s) Selected** button. You need to reload these filters any time you change the Academic Period(s) for a new query.

List

This list report provides one set of results based on the entered search criteria. Data includes ID, name, current amount due, account balance, delinquency, hold count, non-sufficient funds count, collection agency count and city, state/province, postal code, county, nation, telephone, and address type for a preferred address.

Additional information applicable to the List page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page.
- Banner ODS Population: A population saved for this template includes the distinct Entity UIDs for your query result set.

Detail Reports

The following detail information can be accessed for any student or organization on the list report as appropriate:

- Current Addresses
- Other Phone Numbers
- Current Internet Address
- Receivable Summary By Category
- Receivable Summary
- Customer Account Details
- Customer Account Detail Accounting
- Customer Accounting Summary
- Application of Payment Detail Accounting
- Application of Payment Detail Accounting Summary
- Receivable Tax Detail History
- Receivable Tax Detail History Summary
- Deposit History
- Deposit History Summary

- Contract History
- Exemption History
- Installment Plan History
- Collection Agency Assignment
- Holds

Notes

The Receivable Customer reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.

Advancement Report Templates

Use the Advancement report template to obtain reports from Advancement Person.

Advancement Person

Use this report template to:

- Locate constituents in a particular geographic area
- Analyze participation or giving trends
- Profile or segment your constituent population

Search Criteria

Required Search filters: None

Recommended Search filters: None

List

This list report provides one set of results based on the entered search criteria. Data includes ID, name, spouse name, various constituent indicators, email address and the city, state/province, postal code, county, nation, telephone, and address type for a preferred address.

Additional information applicable to the list page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page. These include the Entity UID and formatted (preferred) mailing address.

- Banner ODS Population: A population saved for this template includes the distinct Entity UIDs for your query result set.

Detail Reports

Access the following detail information for any individual on the list report:

- Constituent Detail
- Current Addresses
- Other Phone Numbers
- Current Internet Address
- Demographics
- Medical Information
- Veteran Status
- Employment History
- Relationships
- Degree Summary
- Activities and Leadership Roles
- Donor Categories
- Giving History
- Membership
- Mailings
- Exclusions

Notes

The Advancement Person reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.

Finance Report Templates

Use the Finance report templates to obtain financial reports from the General Ledger or Operating Ledger.

General Ledger

Use this report template to:

- Quickly determine if your fund is in balance
- Obtain an asset balance at any fund level
- Obtain fund reports by financial manager or principal investigator
- Create a general ledger report by specific reporting attributes
- Roll up general ledger balances to a higher level within fund and/or account hierarchy

Search Criteria

Required Search filters: At least one Chart of Accounts and at least one Fiscal Year

Recommended Search filters: Fiscal Period

Search Criteria Notes

Certain list of values (LOV) search Criteria filters in this template require you to select one or more charts to display a specific list of values for that filter. To load these filters to use in your query, choose the desired Chart(s) and select the **Populate Search Criteria for Chart(s) Selected** button. You need to reload these filters any time you change the Chart(s) for a new query.

When including fund, fund type, account or account type attributes, and not selecting specific attributes as a filter, the lines displayed on the List Page may occur more than once for each unique combination of fund and account. This is based on the number of attributes assigned to each fund, fund type, account, and/or account type within the source system. When the lines are not unique for each fund and account, this affects the total of the amounts displayed in the General Ledger List Summary Report. To avoid duplicate lines, select the specific attributes on which you wish to report.

Working with Roll Fund or Roll Account Search Criteria

Leave the radio button defaulted to E and select a specific level value to report on all funds that report to a specific level fund or fund type, as well as to report on all accounts that report to a specific level account or account type.

If you choose one of the level radio buttons, the list report totals the amounts to that level and displays it at that level. The lower levels no longer display as columns in the list report.

Example for level 1

You might choose to list amounts for all level 1 fund types with all their level 2 account types.

If you choose one of the level radio buttons and choose specific fund level values, fund type level values, account level values, or account type level values, the list report displays the selected values with the amounts totaled for that unique combination of selected filters.

Example for level 2

You might choose `Restricted` for a fund type level 2. Select the radio button of 1 for Roll Fund Type and choose Roll Account Type Level 2 with the values. This generates a list report of amounts totaled to the Restricted Fund Level 1 for all account type level 2 values.

If you select the roll radio button for any level other than E, the fund and account being rolled to will display in the fund and account column in the General Ledger list report.

List

The General Ledger List report is dynamically built according to selected search criteria to support reporting attributes and roll-up features. This prevents the normal sort feature from being used. Thus, you will not see any underlined columns in the List report for sorting.

This list report provides two sets of results based on the entered search criteria:

General Ledger List: Data includes beginning balance, current actual and ending balance for each fund and account or selected levels of fund and account and /or reporting attributes.

General Ledger List Summary: Provides a summary of all fund and account amounts displayed in the General Ledger List with a beginning balance, current actual, and an ending balance.

Additional information applicable to the list page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page.

  Additionally, when a List report is generated using the roll-up feature, more rows are exported with the CSV or XML file than what is viewable online. This is because the online version summarizes information such as chart columns from the general ledger for display on the List page. The data in the export file is not summarized; but instead includes each detail line that meets the queried search criteria.
- Banner ODS Population: Not available for finance report templates.

Detail Reports

These reports provide full access to supporting detail for any general ledger line on the list report:

- General Ledger Line: detail report includes one or more detail general ledger lines with report totals. Multiple detail general ledger lines may exist if a search was performed for a report roll-up.
- Transaction Detail: report lists information supporting the general ledger line(s). This data includes the fund, organization, account, program, activity, and location as well as field code, journal type, journal description, and source document key information.
- Transaction Detail Total

More fields of information are provided with the exportable .csv file detail reports than are viewable on the web page.

Notes

- The General Ledger reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.
- The only transaction detail lines that currently display are those that directly update the general ledger. Thus, operating ledger transaction detail and encumbrance ledger transaction detail do not display within this report.

Operating Ledger

Use this report template to:

- Obtain departmental reports by department financial manager
- Obtain reports by financial manager or principal investigator
- Quickly determine departmental budget available balance
- Create a departmental report by reporting attributes
- Roll up operating ledger available balances to a higher level within organization, fund, account, and program and/or location hierarchy
- Obtain a list of all expense or revenue transactions

Search Criteria

Required Search filters: At least one Chart of Accounts and one Fiscal Year

Recommended Search filters: Fiscal Period

Search Criteria Notes

Certain list of values (LOV) search Criteria filters in this template require the selection of one (or more) Charts to display a specific list of values for that filter. To load these filters to use in your query, choose the desired Chart(s) and select the **Populate Search Criteria for Chart(s) Selected** button. You need to reload these filters any time you change the Chart(s) for a new query.

When including fund, fund type, account, account type, organization, or program attributes, and not selecting specific attributes as a filter, the lines displayed on the List Page may occur more than once for each unique combination of organization, fund, account, program, activity and location. This is based on the number of attributes assigned to each accounting distribution element within the source system. When the lines are not unique for each FOAPAL combination, this affects the total of the amounts displayed in the Organization Budget Status Summary Report. To avoid duplicate lines, select the specific attributes on which you wish to report.

Working with Roll Search Criteria

Leave the radio button defaulted to E, and select a specific level value to report on all organizations that report to a specific level organization, specific level fund or fund type, specific level account or account type, specific level program, as well as to report on all locations that report to a specific level location.

If you select one of the level radio buttons, the list report totals the amounts to that level and displays it at that level. The lower levels no longer display as columns in the list report.

Example

You might choose to list amounts for all level 1 organizations with all their level 2 account types.

If you choose one of the level radio buttons and choose specific organization level values, fund level values, fund type level values, account level values, account type level values, program level values, or location level values, the list report displays the selected values with the amounts totaled for that unique combination of selected filters.

Example

You might choose `Restricted` for a fund type level 2. Select the radio button of `1` for Roll Fund Type and choose `Roll Account Type Level 2` with the values. This generates a list report of amounts totaled to the Restricted Fund Level 1 for all account type level 2 values.

If you select the roll radio button for any level other than E, the organization, and/or fund, and/or account, and/or program, and/or location being rolled to displays in their respective columns in the Organization Budget Status list report.

List

This list report provides results based on the entered search criteria:

Organization Budget Status List: Current Period Activity. Year-to-date remaining balance, year-to-date adjusted budget, year-to-date activity, and year- to-date commitments for each accounting distribution or selected levels of the accounting distribution and/or reporting attributes.

Organization Budget Status Summary: Provides a summary by organization only of the chart, fiscal year and period, current period activity, year-to-date remaining balance, year-to-date adjusted budget, year-to-date activity, and year-to-date commitments displayed in the Organization Budget Status List. The report total takes into consideration the normal balance of the account summarized within the department. If the normal balance of an account is a C for credit, the amount is multiplied by a -1, and then added into the summary total.

Suppress Zero Activity Detail Report Lines: To control the number of lines that appear in the Operating Ledger Lines Detail Reports page, select `Yes` from the **Suppress Zero Activity Detail Report Lines** drop-down list. The operating ledger lines that do not have current activity are not listed on the Detail Reports page. If you select `No`, then all operating ledger lines that support the selected List line display regardless of activity. This feature is useful when a List report was requested at a roll-up level, then listing the supporting operating ledger lines on the Detail Reports page. There may be hundreds of departments that had no activity for the period. Reporting to a higher level organization and listing them on the Detail Report page makes it difficult to view the organizations that did have activity.

Additional information applicable to the list page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page.

  Additionally, when a List report is generated using the roll-up feature, more rows are exported with the CSV or XML file than what is viewable online. This is because the online version summarizes information such as chart columns from the operating ledger for display on the List page. The data in the export file is not summarized; but instead includes each detail line that meets the queried search criteria.

- Banner ODS Population: Not available for finance report templates.

Selecting Current Period Detail or Fiscal Year to-date Detail: A detail report can only be created for the current period selected by selecting the bolded amount under the **Curr Prd Activity** column. To obtain a detail report of all fiscal periods up to and including the current period, select the bolded amount under the **YTD Remaining Balance** column. If you select the latter amount, the number of lines in your detail report will increase. This is another reason why the **Suppress Zero Activity Detail Report Lines** drop-down list defaults to `Yes`.

> **Note:** The Organization Budget Status List report is dynamically built according to selected search criteria in order to support reporting attributes and roll-up features. This prevents the normal sort feature from being used. Thus, you will not see any underlined columns in the List report for sorting.

Detail Reports

These reports provide full access to supporting detail for any Organization Budget Status line on the list report:

- The Operating Ledger Lines detail report includes one or more detail operating ledger lines with current period activity and report totals. If the normal balance of the line's account is a Credit, the amount displayed is multiplied by a -1. Thus a positive amount may display in the List Report, but that same amount may display as a negative in the Detail Report. This is to ensure the Report Totals are correct by considering the normal balance of the various accounts.
- The Transaction Detail report lists information supporting the operating ledger line(s). This data includes the fund, organization, account, program, activity, and location as well as journal type, journal description, and source document key information. The amount of the transaction is multiplied by a -1 if the normal balance of the account is a Credit. To allow for improved reconciliation between the transaction detail and the operating ledger lines, the field code is broken out into respective amount columns that updated the operating ledger. Thus, if the transaction had a **field_code** value of `04`, the amount is displayed in the **Curr Prd Encumbrances** column. The breakdown of field code is as follows:

- 01 = Curr Prd Adopted Budget
- 02 = Curr Prd Budget Adjustments
- 03 = Curr Prd Activity
- 04 = Curr Prd Encumbrances
- 05 = Curr Prd Budget Reservations
- 06 = Curr Prd Accumulated Budget
- 07 = Curr Prd Temporary Budget

Notes

- The Operating Ledger reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.
- The only transaction detail lines that currently display are those that directly update the operating ledger. Thus, general ledger transaction detail and encumbrance transaction detail do not display within this report. If an Operating Ledger line was selected that did not have any current activity, no transaction detail lines will display.

Financial Aid Report Templates

Use the Financial Aid report template to obtain Financial Aid Award and Disbursement reports.

Financial Aid Awards

Use this report template to:

- Determine who has been awarded a specific Financial Aid fund (or group of funds) during a particular Academic Period (or group of Academic Periods)
- Determine who has had financial aid disbursed during a particular academic period (or group of academic periods)
- Determine the status of a particular award (or group of awards) during a particular academic period (or group of academic periods)
- Answer demographic questions about the populations of students awarded financial aid during a particular academic period (or group of academic periods)

Search Criteria

Required Search filters: At least one Academic Period

Recommended Search filters: Fund, Fund Source Type, Financial Aid Type

List

This list report provides one set of results based on the entered search criteria. Data includes ID, name, academic period, financial aid information, student status information email address and the city, state/province, postal code, county, nation, telephone, and address type for a preferred address.

Additional information applicable to the list page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page. These include the Entity UID and formatted (preferred) mailing address.
- Banner ODS Population: A population saved for this template will include the distinct combinations of Entity UIDs and Academic Periods for your query result set.

Detail Reports

The following detail information can be accessed for any student on the list report:

- Current Addresses
- Other Phone Numbers
- Current Internet Address
- Applicant Status
- Award By Person
- Award Disbursement
- Academic Study
- Enrollment Information
- Financial Aid Enrollment
- Academic Information
- Academic Standing
- Satisfactory Academic Progress
- Holds
- Demographics
- Medical Information
- Veteran Status
- International Details

Notes

The Financial Aid Awards reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.

Human Resources Report Templates

Use the Human Resources report template to obtain employee reports.

Employee

Use this report template to:

- Analyze employee demographics
- Download contact, demographic and primary position information about an employee
- Look up detailed information about a particular employee

Search Criteria

Required Search filters: None

Recommended Search filters: Employee Status, Employee Class, Leave Category, and Benefit Category.

List

This list report provides one set of results based on the entered search criteria. Data includes ID, name, demographic and employee status information, email address and the city, state/province, postal code, county, nation, telephone, and address type for a preferred address.

Additional information applicable to the list page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page.
- Banner ODS Population: A population saved for this template will include the distinct Entity UIDs for your query result set.

Detail Reports

The following detail information can be accessed for any employee on the list report:

- Current Addresses
- Other Phone Numbers

- Current Internet Addresses
- Benefits (Current Year)
- Beneficiaries
- Leave Balances
- Bargaining Units
- Certifications
- Skills
- Tax Deductions (Current Year)
- Review History
- Position History
- Earning History
- Demographics
- Medical Information
- Veteran Status
- International Details
- Employment History

Notes

- The Human Resources reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.
- Do not use this report template if you expect to retrieve information pertaining to an employee's secondary position(s).

Student Report Templates

Use the Student report templates to obtain reports relating students to Advisors, students applying for admission or student enrollment.

Advisor's Students

Use this report template to:

- Retrieve information for specific advisees when meeting with a group of advisees
- Identify a group of students that fit a set of criteria to contact that group of students, such as:

- Students within an advising type responsibility
- Students from a geographic region (Nation, State/Province)
- Students who are international students
- Students in academic difficulty
- Students receiving financial assistance
- Review the assignments made to a group of advisors

Search Criteria

Required Search filters: At least one Academic Period and the student grouping you wish to see. This will be the group of students currently assigned to an advisor, the group that has never been assigned to an advisor or the group that does not have a current advisor assignment.

Recommended Search filters: Varies based on the group to be reviewed by the advisor.

Search Criteria Notes

Certain list of values (LOV) search criteria filters in this template require the selection of one (or more) Academic Periods to display a specific list of values for that filter. To load these filters to use in your query, choose the desired Academic Period(s) and select the Populate Search Criteria for Academic Period(s) Selected button. You will need to reload these filters any time you change the Academic Period(s) for a new query.

List

This list report provides one set of results based on the entered search criteria. Data includes ID, name, academic period, assigned advisor, summary student information, email address and the city, state/province, postal code, county, nation, telephone, and address type for a preferred address.

Additional information applicable to the list page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page. These include the Entity UID, formatted (preferred) mailing address and Advisor UID.
- Banner ODS Population: A population saved for this template will include the distinct combinations of Entity UIDs and Academic Periods for your query result set.

Detail Reports

The following detail information can be accessed for any student on the list report:

- Current Addresses
- Other Phone Numbers
- Current Internet Address

- Student Advisor(s)
- Academic Study
- Enrollment Information
- Academic Information
- Academic Standing
- Holds
- Student Courses
- Student Course Grades
- Student Course Attributes
- Student Course Meeting Times
- Demographics
- Medical Information
- Veteran Status
- International Details
- Activities
- Latest Secondary School
- Latest Post Secondary School
- Test Scores
- Employment History

Notes

- The Advisor’s Students reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.
- The Advisor's Students List can be used to download the contact and summary information for the selected group of students advised.
- The Advisor's Students List is designed to retrieve the students being advised for a specified academic period. Therefore, you would not use this to retrieve all the students ever advised by a specific advisor.
- Selection must include one of the following groups of students:
  - Currently assigned to an advisor
  - Never been assigned to an advisor
  - Does not have a current advisor assigned.

- Search Criteria filters in this template require an Academic Period to display a specific list of values for that filter. To load these filters to use in your query, select or change to the desired Academic Period and select the Populate Search **Criteria** button.
- Detail reports display data for the students selected for all academic period independent of the academic period in the selection criteria.

Admissions Application

Use this report template to:

- Identifying admissions applications that are complete and ready for review
- Monitor application status and review admission application details
- Compile details of applicants matching a set of criteria for further review
- Track admissions application decisions by college and or department

Search Criteria

Required Search filters: At least one Academic Period

Recommended Search filters: None

List

This list report provides one set of results based on the entered search criteria. Data includes ID, name, academic period, student level, application complete indicator, program, degree, college, major, department, campus, site, enrolled indicator, latest decision, email address and the city, state/province, postal code, county, nation, telephone, and address type for a preferred address.

Additional information applicable to the list page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page. These include the Entity UID and formatted (preferred) mailing address.
- Banner ODS Population: A population saved for this template will include the distinct combinations of Entity UIDs and Academic Periods for your query result set.

Detail Reports

The following detail information can be accessed for any student on the list report:

- Current Addresses
- Other Phone Numbers
- Current Internet Address
- Admissions Application

- Application Academic Study
- Admissions Rating
- Admissions Decisions
- Application Deposit Detail
- Financial Aid Information
- Admissions Attributes
- Admissions Cohorts
- Admissions Requirements
- Additional Information Counts
- Recruitment Information Detail
- Application Additional Information
- Demographics
- Medical Information
- Veteran Status
- International Details
- Latest Secondary School
- Latest Post Secondary School
- Test Scores
- Employment History

Notes

- The Admission's Application reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.
- Multiple persons at the institution will need to review the data supplied by an applicant for admission and this report template is primarily to pull together for that administrator, reviewer, rater, all the data stored in the system for the applicant into a concise report of the information.
- While multiple academic periods may be used for selection criteria, it is recommended that the admissions applications be looked at for a single academic period at a time. This would correspond to normal application business processing.

Enrolled Students

Use this report template to:

- Review student enrollments by academic period and program attributes
- Track student course registration activity
- Retrieve a list of students registered in courses with missing scheduling details

Search Criteria

Required Search filters: At least one Academic Period

Recommended Search filters: None

Search Criteria Notes

Certain list of values (LOV) search criteria filters in this template require the selection of one (or more) Academic Periods to display a specific list of values for that filter. To load these filters to use in your query, choose the desired Academic Period(s) and select the Populate Search Criteria for Academic Period(s) Selected button. You will need to reload these filters any time you change the Academic Period(s) for a new query.

The Student Course Search Criteria filters are for course registrations at your institution only. Transfer courses are excluded from queries.

List

This list report provides one set of results based on the entered search criteria. Data includes ID, name, academic period, sub-academic period, enrollment status, current time status, total credits, enrolled, registered and deceased indicators, email address and the city, state/province, postal code, county, nation, telephone, and address type for a preferred address.

Additional information applicable to the list page for this report template is available using the following:

- Export Options: More fields of information are provided with the exportable .csv and .xml files than are viewable on the List page. These include the Entity UID and formatted (preferred) mailing address.
- Banner ODS Population: A population saved for this template will include the distinct combinations of Entity UIDs and Academic Periods for your query result set.

Detail Reports

The following detail information can be accessed for any student on the list report:

- Current Addresses
- Other Phone Numbers
- Current Internet Address
- Academic Study
- Enrollment Information

- Academic Information
- Academic Standing
- Holds
- Student Courses
- Student Course Meeting Times
- Demographics
- Medical Information
- Veteran Status
- International Details

Notes

- The Student Course reporting template provides a broad array of query opportunities. Performance, or the time it takes to retrieve a list of results, may vary based on the complexity of your query or the size of a potential result set.
- Search Criteria filters in this template require an Academic Period to display a specific list of values for that filter. To load these filters to use in your query, select or change to the desired Academic Period(s) and select the Populate Search Criteria button.
- The Student Course Search Criteria filters and the Registered Courses Detail report do not included transfer course information (STUDENT_COURSE records where TRANSFER_COURSE_IND = Y are excluded).
- Detail reports containing Academic Period based information are for the Academic Period in context for the row selected from the List page.

Self-Service Reporting Configuration Parameters

See the “Customize Parameters” section of the *Self-Service Reporting Installation Guide* for steps on how to set up Administrative User Interface parameters used within SSR.

Security

There are various security options available for SSR. This section discusses authentication and authorization access to your Oracle database. It does not cover security configuration such as firewall placement or securing your application server. Information on those topics is available from Oracle at the Oracle Application Express (APEX) home page:

http://www.oracle.com/technetwork/developer-tools/apex/overview/index.html.

APEX first performs application authentication. This determines whether a user has access to an application, such as SSR. To determine which components a user has access to, APEX performs authorization.

APEX provides several methods for authentication. You can choose from a series of preconfigured authentication schemes, copy an existing scheme from another APEX application that you have already developed, or create your own custom authentication scheme. A description of the various methods appears below:

- Oracle Account Security

  The default SSR security method uses Oracle accounts. If you are already using Oracle accounts for security at your reporting layer, particularly if you have implemented Fine Grained Access in Banner ODS, this option may be the simplest way to implement SSR, and would allow you to bring up SSR without adding to your security maintenance.

- APEX Built-in Authentication

  If you have already set up security in Banner ODS for a reporting tool such as Oracle Business Intelligence Discoverer or ReportNet, you may want to establish a similar security scheme for SSR. User accounts for SSR are created and maintained using the APEX Administrative User Interface.

- Use an Existing Security Scheme

  If you have already created your own APEX application and have devised your security scheme to govern it, you may be able to use that same security scheme for SSR.

- Create Your Own Custom Authentication Scheme

  APEX provides a wizard creates an authentication scheme from scratch.

- Other Security Options

  APEX enables you to integrate SSR with an LDAP server or with Oracle's Single Sign-On technology.

For more information on authentication, refer to the *Oracle Application Express User's Guide* (available in Oracle online documentation).

Oracle Account Security

Authentication

The default SSR security method uses Oracle accounts. If you are already using Oracle accounts for security at your reporting layer, particularly if you have implemented Fine Grained Access in Banner ODS, this may be the simplest way to implement SSR, and would allow you to bring up Self-Service Reporting (SSR) without adding to your security maintenance.

APEX runs on the PL/SQL module of Oracle's Application Server. The PL/SQL module uses a database access descriptor (DAD) and a SQL*Net connection to log into your

Oracle database. The APEX DAD stores a username and password with which to log into the database. However, to use Oracle account security you need to configure the DAD so that it does not store a user name and password. The user is prompted for these values. The user name is then made available in the APEX substitution variable called APP_USER.

Authorization

The SSRMGR.SCK_COMMON package includes the F_getSSRPermissions function which uses the Oracle User ID to determine which SSR reporting templates that each user is authorized to access.

The function call for F_getSSRPermissions is located in the SSR application on Page 1 for all report templates, then again in a Branch on each report template page to prevent access to the page via a bookmark or URL manipulation.

Navigate to Page 1:

1. Log into APEX as an *SSR Workspace Administrator*.
2. Select **Application Builder**.
3. Select the **SSR** application.
4. Navigate to the Page Definition for page 1.
5. The call to F_getSSRPermissions is located in SET_PERMISSIONS under *Processes* in the Page Rendering column. Each call to F_getSSRPermissions sets permission for a single report template. F_getSSRPermissions calls F_getSSRPermissionsViewList to retrieve the list of views for which a user must be granted SELECT permission in order to run a given report template.

   If you add or delete a report template or add or delete any views for a report template, you *must* change SSRMGR.SCK_COMMON.F_getSSRPermissions and/or F_getSSRPermissionsViewList.

   SSR is delivered with scripts which can be used to issue the grants that are required to access each of the SSR report templates. These scripts are located in the ssr/security install directory.

Add Security for a New Report Template

1. Log into APEX as an *SSR Workspace Administrator* using the following URL format as an example:

   http://hostname:port/pls/database_access_descriptor/f?p=4550:1

- *hostname* is the name of the system where Oracle HTTP Server is installed.
- *port* is the is the port number assigned to Oracle HTTP Server. In a default installation, this number is *7777*. For more information, see “Accessing the Oracle Application Express Login Page” in the *APEX Installation Guide*.
- *database_access_descriptor* describes how Oracle HTTP Server connects to the database server so that it can fulfill an HTTP request. The default value is *apex*.

- The remainder of the URL indicates to display the login page for a Workspace Administrator.

2. You will now be presented with the APEX Login page. Login using *SSR* as the Workspace and use the administrator ID and password.
3. Select Application Builder.
4. Select the SSR application.
5. Navigate to the Page Definition for page 1.
6. In the *Items* section, add a new Item for the new report template. For example, an existing security Item is P1_STU_ADVISOR_STUDENT.
7. In the *Processes* section at the bottom of the Page Rendering column, select **SET_PERMISSIONS**.
8. Using the existing code as an example, add the code to set the value of the new Item you just created. Note that permissions are set for each template and for each menu group, i.e., Student, Advancement, etc. and that you need to add code to set the permission for the new report template and add code to set the permission for the menu where your new report template will appear.
9. Edit the function SSRMGR.SCK_COMMON. F_getSSRPermissionsViewList, using the existing code as an example, add the new report template name and associated list of views. Compile SSRMGR.SCK_COMMON.

Delete Security for a Report Template

1. To login to SSR and locate page 1, follow the first 5 instructions in the above section, Add Security for a New Report Template.
2. In the *Processes* section at the bottom of the Page Rendering column, select **SET_PERMISSIONS**.
3. Comment out references to the item associated with the report template.
4. Navigate to the Page Definition for the Search Criteria page in the Report Template for which you are modifying security. In the *Branches* section at the bottom of the Page Processing column, delete the security Branch to page 1 from the report template.

Change the List of Views for a Report Template

1. Edit the function SSRMGR.SCK_COMMON. F_getSSRPermissionsViewList.
2. Change the list of views associated with the template(s) you are changing.
3. Compile SSRMGR.SCK_COMMON.

APEX Built-in Authentication

If you have already set up security in Banner ODS for a reporting tool such as Oracle Business Intelligence Discoverer or ReportNet, you may want to establish a similar security scheme for SSR. This is accomplished using the APEX Administrative User Interface.

Change the Authentication Scheme

1. Log into APEX as an *SSR Workspace Administrator* using the following URL format as an example:

   http://hostname:port/pls/database_access_descriptor/f?p=4550:1

   1.1. *hostname* is the name of the system where Oracle HTTP Server is installed.

   1.2. *port* is the is the port number assigned to Oracle HTTP Server. In a default installation, this number is *7777*. For more information, see "Accessing the Oracle Application Express Login Page" in the *APEX Installation Guide*.

   1.3. *database_access_descriptor* describes how Oracle HTTP Server connects to the database server so that it can fulfill an HTTP request. The default value is *apex*.

   1.4. The remainder of the URL indicates to display the login page for a Workspace Administrator.

2. You will now be presented with the APEX Login page. Login using *SSR* as the Workspace and use the administrator ID and password.
3. Select **Application Builder**.
4. Select the **SSR** application.
5. Select **Edit Attributes**.
6. Select **Security**.
7. Select **Define Authentication Schemes**.
8. On the right side of the page, select **Change Current.**
9. Change the value of **Available Authentication Schemes** to `Application Express`.
10. On the confirmation page, select **Make Current**.

Application Express User Account Authentication

APEX performs authentication and authorization using information stored in its own tables. The user accounts are those that are created in the SSR workspace. You can set up user accounts one of two ways.

1. Create a user account through the APEX Administrator interface:

   1.1. Login to APEX as an APEX Administrator.

   1.2. Select **Manage Workspaces**.

   1.3. Select **Manage Developers and Users**.

   1.4. Select **Create**.

   1.5. Enter the required information and when done select either the **Create** button or the **Create and Create Another** button.

2. Create a user account through the APEX Workspace Administrator interface:

   2.1. Login to APEX as an *SSR Workspace Administrator*.

2.2. On the Home page, select the link **Manage Application Express Users** in the Administration box on the right side of the page.

2.3. Select **Create End User**.

2.4. Enter the information except for User Groups and when done select either the **Create** button or the **Create and Create Another** button.

Create User Groups

Authorization is accomplished by assigning end users to User Groups. Create a User Group for each SSR Report Template:

1. Login to APEX as an *SSR Workspace Administrator*.
2. On the Home page, select the link **Manage Application Express Users** in the Administration box on the right side of the page.
3. Select **Create Group** and create a group for each of the following Report Templates. Be sure to *enter each name exactly as listed below*:

- Admissions Application
- Advancement Person
- Advisor Student Listing
- Employee
- Enrolled Students
- Financial Aid Awards
- General Ledger
- Operating Ledger
- Receivable Customer

Application Express User Account Authorization

Authorization is accomplished by assigning end users to User Groups. SSR is delivered with a User Group defined for each Report Template. To assign end users to SSR User Groups:

1. Login to APEX as an *SSR Workspace Administrator*.
2. On the Home page, select the link **Manage Application Express Users** in the Administration box on the right side of the page.
3. Select **Existing Users**.
4. Select a user from the list.
5. Under User Groups, select the appropriate User Groups for that user and select **Apply Changes**.

Note: Be certain to assign all User Groups to all users who are listed as Developers and/or Workspace Administrators.

Change the Authentication Scheme application item

An APEX application item, or global variable, called F1_SECURITY_TYPE has been created to direct the SSR permissions function, SCK_COMMON.F_getSSRPermissions, to use either Oracle User Account Security or Application Express User Account Security. To change the value of this item:

1. From the SSR Workspace Administrator Home page, select **Application Builder**.
2. Select the **SSR** application.
3. Select **Shared Components**.
4. In the Logic section, select **Application Items**.
5. At the bottom of the page, select the arrow next to **Existing Application Level Computations**. That will display the list of application items.
6. Select the edit icon in column 1 to edit F1_SECURITY_TYPE.
7. In the Computation attribute change the value of `ORACLE` to APEX and select **Apply Changes**.

Refer to the *Oracle Application Express User's Guide release 2.0* (Oracle document B16373-01) for additional details.

Other Security Options

Oracle allows you to configure the SSR application as a partner application with the Single Sign-on (SSO) infrastructure using Oracle Internet Directory (OID). To learn more about this option, visit the Oracle APEX Home Page URL (noted at the beginning of this section), select the link to *How-To's*, then select from the various papers available in the "Security" section.

Any LDAP server can be used for APEX authentication. In the Shared Components section of the SSR application, APEX provides a wizard which allows you to define the access parameters to your LDAP server. The wizard assumes that the server already exists and that it can respond to a SIMPLE_BIND_S call for credentials verification. Refer to the same above-mentioned "Security" section at the Oracle Web site.

APEX also allows you to use an existing authentication scheme of your own, or to create a new one. To implement a custom scheme, you must provide a PL/SQL function returning a Boolean value that APEX will execute before processing each page request. As with the setup for an LDAP server, APEX provides a wizard in the Shared Components of the SSR application with which to define a custom authentication scheme.