APPENDIX A

(GBR) PBI Field Derivation

Bundle 27
The chapter has been updated for the PBI Upload File changes for 2013.

This chapter describes how the system derives the field values for the Upload, Update, and Report extracts.

See Also

[PeopleSoft Recruiting and Admissions 9.0 PeopleBook](GBR) Managing PBI Data Exchange

Understanding PBI Field Derivation

We recommend that you review the field specification, sample XML files, schemas and validation documents available on UKBA web site. The field specification provides information, such as, each field's format, description, whether a field value is required for SMS to issue the CAS number, whether the academic institution must validate a field value using the schema, and whether SMS performs additional validation on the field value when you upload the file.

You can capture the field values at three levels in Campus Solutions:

1. Configuration level.
2. Academic program or plan level.
3. CAS Details level.

See the *Preparing for PBI Data Exchange* section in the "(GBR) Managing PBI Data Exchange" chapter, for more information about the data capture levels.

The following table lists the navigation paths for the pages mentioned throughout this chapter:

Page	Navigation
PBI Configuration	Student Admissions, PBI Processing, PBI Configuration
Academic Plan PBI Data	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, PBI Data
Academic Program PBI Data	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, PBI Data
CAS Details	Student Admissions, PBI Processing, CAS Maintenance, CAS Details

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Upload Extract Fields

This section discusses how the Create Extract process derives the field values for the Upload extract. To derive specific fields the following values are determined for each CAS Details record:

- Campus and Academic Program
  - Selected from the current Application Program Data record for applicants.
  - Selected from the current Student Program record for students.
- Academic Plan
  - Selected from the Reported Plan value from the CAS Details page.
  - If no Reported Plan is defined:

    - Selected from the current Application Plan Data record for applicants. If more than one record exists the first plan code alphabetically is selected.

    - Selected from the Student Plan record for students. If more than one record exists the plan with the lowest sequence number is selected.-
- Academic Subplan
  - Selected if Enable Sub-Plan Reporting is checked on the PBI Configuration page.
  - Selected from the current Application Sub-Plan Data record for applicants.
  - Selected from the current Student Sub-Plan record for students.
  - If more than one record exists the first subplan code alphabetically is selected.

Upload File ID

Upload Extract Data page: Header

XML Tag: <BulkUploadFileId>

Mandatory: Yes

Pages Used:

Page	Page Element
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Upload File ID Override

Derivation Steps:

1. Derive from the Upload File ID Override parameter of the Create Extract process.
2. Derive in the format *INST_UPLOAD_YYYY_MM_DD_nn* (for example, PSUNV_UPLOAD_2009_09_27_01), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

Schema ID

Upload Extract Data page: File Details

XML Tag: <SchemaID>

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Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Schema ID

Derivation Steps:

1. Derive the long description value of the translate value defined on the PBI Configuration page.

Tier ID

Upload Extract Data page: File Details

XML Tag: <TierID>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Tier ID

Derivation Steps:

1. Derive the long description value of the translate value defined on the PBI Configuration page.

Category

Upload Extract Data page: File Details

XML Tag: <Category>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Category

Derivation Steps:

1. Derive the long description value of the translate value defined on the PBI Configuration page.

Sponsor Licence Number

Upload Extract Data page: File Details

XML Tag: <SponsorLicenceNumber>

Mandatory: Yes

Pages Used:

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Page	Page Element
PBI Configuration	Sponsor Licence Number Campus Sponsor Licence Number

Derivation Steps:

1. Derive the value defined for the Campus of the applicant or student defined on the PBI Configuration page.
2. Derive the value defined for the institution on the PBI Configuration page.

Applicant ID

Upload Extract Data page: Header

XML Tag: <ApplicantID>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	ID

Derivation Steps:

1. Derive from the CAS Details record.

UCAS Personal ID

Upload Extract Data page: Applicant Details

XML Tag: <UCAS_UKPASS_Id>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	UCAS Personal ID
External System ID (Campus Community, Personal Information, Identification, External System ID)	External System ID

Derivation Steps:

1. Derive from External System ID records with type UC or UP.
2. Derive as null.

Application ID

Upload Extract Data page: Applicant Details

XML Tag: <ApplicationID>

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Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Application Number Program Number

Derivation Steps:

1. Derive as a concatenation of Application Number and Program Number from the CAS Details page.
2. Derive as null for Student record type.

Family Name

Upload Extract Data page: Applicant Details

XML Tag: <FamilyName>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	Last Name

Derivation Steps:

1. Derive from the current primary name record.

Given Name

Upload Extract Data page: Applicant Details

XML Tag: <GivenName>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	First Name

Derivation Steps:

1. Derive from the current primary name record.

Note. UKBA have indicated that this field can be blank where the applicant or student only has one name although a first name value is required in Campus Solutions. If required the Reported Value for Given Name can be set to blank on the Upload Extract Data page prior to creating the XML.

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Other Names

Upload Extract Data page: Applicant Details

XML Tag: <GivenName>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	Middle Name

Derivation Steps:

1. Derive from the current primary name record.
2. Derive as null.

Nationality

Upload Extract Data page: Applicant Details

XML Tag: <Nationality>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Nationality

Derivation Steps:

1. Derive from the CAS Details record.

Note. If required the Reported Value can be set to *STATELESS* on the Upload Extract Data page prior to creating the XML. The text must be contained within to pass schema validation.

Gender

Upload Extract Data page: Applicant Details

XML Tag: <Gender>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Gender

Derivation Steps:

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1. Derive from the current Biographical History record where Male is derived as 1 and Female is derived as 2.
2. Derive as *NULL ERROR.*

Country of Birth

Upload Extract Data page: Applicant Details

XML Tag: <CountryOfBirth>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Birth Country

Derivation Steps:

1. Derive from the Birth Information record.
2. Derive as *NULL ERROR.*

Place of Birth

Upload Extract Data page: Applicant Details

XML Tag: <PlaceOfBirth>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Birth Location

Derivation Steps:

1. Derive from the Birth Information record.
2. Derive as *NULL ERROR.*

Date of Birth

Upload Extract Data page: Applicant Details

XML Tag: <DateOfBirth>

Mandatory: Yes

Pages Used:

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Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Date of Birth
CAS Details	Report Month/Year Only Report Year Only

Derivation Steps:

1. Derive from the person record. If Report Year Only check box is selected, derived as YYYY. If the Report Month/Year Only check box is selected, derived as YYYY-MM. If neither check box is selected derived as YYYY-MM-DD.
2. Derive as *NULL ERROR.*

Passport Number

Upload Extract Data page: Applicant Details

XML Tag: <ApplicantPassportOrTravelDocumentNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Passport Number

Derivation Steps:

1. Derive from the CAS Details record.

Partner Institution

Upload Extract Data page: Other Institution Details

XML Tag: <Name>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Organization Table (Campus Community, Organization, Create/Maintain Organizations, Organization Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.

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3. Derive from the Academic Program record.
4. Derive as null.

Partner Institution Sponsor Licence Number

Upload Extract Data page: Other Institution Details

XML Tag: <SponsorLicenceNumber>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Regional (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Regional)	Sponsor Licence Number

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Partner Institution Address 1

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.

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4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value if the country is either Belgium or the Netherlands the value is derived as a combination of Street (Address Line 3) and Number.

Partner Institution Address 2

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Partner Institution Address 3

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

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Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Partner Institution Address 1.

Partner Institution City

Upload Extract Data page: Other Institution Details

XML Tag: <City>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Partner Institution County/Area/District

Upload Extract Data page: Other Institution Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

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Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Partner Institution Country

Upload Extract Data page: Other Institution Details

XML Tag: <Country>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Partner Institution Postcode

Upload Extract Data page: Other Institution Details

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XML Tag: <PostCode>

Mandatory: If any partner institution details are supplied and country is GBR

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value and Partner Institution Country is GBR, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Overseas Institution

Upload Extract Data page: Other Institution Details

XML Tag: <Name>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Organization Table (Campus Community, Organization, Create/Maintain Organizations, Organization Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

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Overseas Institution Address 1

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value, if the country is either Belgium or the Netherlands, the value is derived as a combination of Street (Address Line 3) and Number.

Overseas Institution Address 2

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.

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2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Address 3

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Overseas Institution Address 1.

Overseas Institution City

Upload Extract Data page: Other Institution Details

XML Tag: <City>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution

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Page	Page Element
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Overseas Institution County/Area/District

Upload Extract Data page: Other Institution Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Country

Upload Extract Data page: Other Institution Details

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XML Tag: <Country>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Postcode

Upload Extract Data page: Other Institution Details

XML Tag: <PostCode>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

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Course Title

Upload Extract Data page: Course Details

XML Tag: <CourseCurriculumTitle>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Course Title Override
PBI Configuration	Enable Sub-Plan Reporting
Sub-Plan HESA (Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Sub-Plan HESA)	Course Title
Academic Sub-Plan Table (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table)	Description
Plan HESA Data (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan HESA Data)	Course Title
Academic Plan Table (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive the Course Title from the Sub-Plan HESA record.
3. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive a concatenation of plan description + space + sub-plan description.
4. Derive the Course Title from the Plan HESA Data record.
5. Derive the plan description.

Course ID

Upload Extract Data page: Course Details

XML Tag: <CourseID>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Enable Sub-Plan Reporting

Derivation Steps:

1. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive the sub-plan code.
2. Derive the plan code.

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Academic Level

Upload Extract Data page: Course Details

XML Tag: <AcademicLevel>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Academic Level

Derivation Steps:

1. Derive from the CAS Details record. Derive as the short name (XLATSHORTNAME) from the Translate Values table (PSXLATITEM), for SAD_PB_ACAD_LEVEL.

There are page elements that have translate values. For example, translate values *Presessional B1* and *Presessional B2* for the Academic Level page element on the CAS Details page. The Create Extract process derives the field value as short name (XLATSHORTNAME) from these page elements. For example, suppose you have defined an academic level translate value on the CAS Details page as *Presessional B1* which has a short name of *B1*. In such a case, the Create Extract Data process derives the Academic Level field value as *B1*.

Note. The system sets the default Academic Level value on the CAS Details page based on the COURSEAIM defined on the Plan HESA Data, Program HESA Data, or Sub-Plan HESA page. The order in which COURSEAIM is checked: Plan HESA Data page first, then Program HESA Data page and finally Sub-Plan HESA page. The system defaults the NQF level using the first letter of the COURSEAIM value as follows:

D — Doctoral — NQF Level 8

M — Masters — NQF Level 7

H — Honours —NQF Level 6

I — Intermediate — NQF Level 5

C — Certificate — NQF Level 4

You can change this default value on the CAS Details page.

Secondary Academic Level

Upload Extract Data page: Course Details

XML Tag: <SecondaryAcademicLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Secondary Academic Level

Derivation Steps:

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1. Derive from the CAS Details record. Derive as the short name (XLATSHORTNAME) from the Translate Values table (PSXLATITEM), for SAD_PB_ACAD_LEVEL.
2. Derive as null.

See Also

Academic Level

Course Start Date

Upload Extract Data page: Course Details

XML Tag: <CourseStartDate>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	CourseStartDate

Derivation Steps:

1. Derive from the CAS Details record.

Note. If the derived date is not in the future an error message is logged.

Latest Acceptance Date

Upload Extract Data page: Course Details

XML Tag: <LatestDateForAcceptanceOnCourse>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Latest Acceptance Date

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Note. If the derived date is not in the future, or is before the derived Course Start Date, or is after the derived Expected Course End Date, an error message is logged.

Expected End Date

Upload Extract Data page: Course Details

XML Tag: <ExpectedCourseEndDate>

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Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Expected End Date

Derivation Steps:

1. Derive from the CAS Details record.

Note. If the derived date is not in the future, or is before the derived Course Start Date, an error message is logged.

Full-Time Course

Upload Extract Data page: Course Details

XML Tag: <CourseIsFullTime>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Full-Time Course

Derivation Steps:

1. If the value in the CAS Details record is Yes, derive as *true*
2. Derive as *false.*

Course Hours

Upload Extract Data page: Course Details

XML Tag: <CourseHoursPerWeek>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Course Hours
Academic Plan PBI Data	Course Hours
Academic Program PBI Data	Course Hours

Note. The Course Hours field is mandatory on the CAS Details page if Full-Time Course is No. The system performs steps 2, 3, or 4 only if Full-Time Course is Yes on the CAS Details page.

Derivation Steps:

1. Derive from the CAS Details record.

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2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Full-Time Course is derived as true, derive as *0.0*

Main Site Address 1

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	Address Line 1

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as *NULL ERROR.*

Main Site Address 2

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	Address Line 1

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.

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2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site Address 3

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	Address Line 3

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site City

Upload Extract Data page: Course Details

XML Tag: <City>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	City

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.

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2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as *NULL ERROR.*

Main Site County/Area/District

Upload Extract Data page: Course Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	County (UK addresses) State

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site Postcode

Upload Extract Data page: Course Details

XML Tag: <PostCode>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	Post Code

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.

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2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as *NULL ERROR.*

Work Placement

Upload Extract Data page: Course Details

XML Tag: <ApplicantHasWorkPlacement>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Work Placement

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true,* No is derived as *false.*

Work Placement Percentage

Upload Extract Data page: Work Placement Details

XML Tag: <WorkPlacementPercentage>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Percentage

Derivation Steps:

1. Derive as the short translate value from the CAS Details record.
2. Derive as null.

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The following note has been added:

Note. On the CAS Details page, a Placement Percentage value is mandatory for Upload Ready status if Work Placement is Yes.

Work Placement Justification

Upload Extract Data page: Work Placement Details

XML Tag: <WorkPlacementJustificationText>

Mandatory: No

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Pages Used:

Page	Page Element
CAS Details	Placement Justification

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Bundle 27
The following note has been added:

Note. On the CAS Details page, a Placement Justification value is mandatory for Upload Ready status if Placement Percentage is greater than 033.

Work Placement Address 1

Upload Extract Data page: Work Placement Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value if the country is either Belgium or the Netherlands the value is derived as a combination of Street (Address Line 3) and Number.

Work Placement Address 2

Upload Extract Data page: Work Placement Details

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XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Work Placement Address 3

Upload Extract Data page: Work Placement Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

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Note. If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Work Placement Address 1.

Work Placement City

Upload Extract Data page: Work Placement Details

XML Tag: <City>

Mandatory: If any work placement details are supplied

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Work Placement Address 1 has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Work Placement County/Area/District

Upload Extract Data page: Work Placement Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

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Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Work Placement Country

Upload Extract Data page: Work Placement Details

XML Tag: <Country>

Mandatory: If any work placement details are supplied

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Work Placement Postcode

Upload Extract Data page: Work Placement Details

XML Tag: <PostCode>

Mandatory: If any work placement details are supplied and country is GBR

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation

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Page	Page Element
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Work Placement Address 1 has a value and Work Placement Country is GBR, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Secure English Language Test (SELT) Required

Upload Extract Data page: Evidence Details

XML Tag: <SELTRequired>

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The SELT Required value is now mandatory for Upload Ready status on the CAS Details page.

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	SELT Required

Derivation Steps:

1. Derive from the CAS Details record. Yes is derived as *true*, No is derived as *false*.

Reason SELT Not Required

Upload Extract Data page: Evidence Details

XML Tag: <ReasonSELTNotRequired>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Reason SELT Not Required

Derivation Steps:

1. Derive as the short translate value from the CAS Details record. If a message number is found in the short translate value, then derive the message text. Else derive the short translate value. *

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2. Derive as null.

* One of the valid values - *ENG_COUNTRY* - is too long to be held as short translate name (maximum is 10 characters) in the system. For ENG_COUNTRY, the short translate value is set to a message number (93).

Note. On the CAS Details page, a Reason SELT Not Required value is mandatory for Upload Ready status if SELT Required is *No*.

English Language Level Attained

Upload Extract Data page: Evidence Details

XML Tag: <EnglishLanguageLevelAttained>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Level Attained

Derivation Steps:

1. Derive as the short translate value from the CAS Details record.
2. Derive as null.

Note. On the CAS Details page, a English Level Attained value is mandatory for Upload Ready status if SELT Required is *Yes*.

SELT Listening Level

Bundle 27
New

Upload Extract Data page: Evidence Details

XML Tag: <SELTListeningLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Listening Level

Derivation Steps:

1. Derive short translate name of the value from the CAS Details record.
2. Derive as null.

SELT Reading Level

Bundle 27
New

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Upload Extract Data page: Evidence Details

XML Tag: <SELTReadingLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Reading Level

Derivation Steps:

1. Derive short translate name of the value from the CAS Details record.
2. Derive as null.

SELT Speaking Level

Bundle 27
New

Upload Extract Data page: Evidence Details

XML Tag: <SELTSpeakingLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Speaking Level

Derivation Steps:

1. Derive short translate name of the value from the CAS Details record.
2. Derive as null.

SELT Writing Level

Bundle 27
New

Upload Extract Data page: Evidence Details

XML Tag: <SELTWritingLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Writing Level

Derivation Steps:

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1. Derive short translate name of the value from the CAS Details record.
2. Derive as null.

SELT Test Provider

Upload Extract Data page: Evidence Details

XML Tag: <TestProvider>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Training Provider

Derivation Steps:

1. Derive as the short translate value from the CAS Details record.
2. Derive as null.

Note. On the CAS Details page, a Training Provider value is mandatory for Upload Ready status if SELT Required is *Yes*.

Previous UK Study

Upload Extract Data page: Evidence Details

XML Tag: <PreviousUKStudy>

Bundle 27

The Previous UK Study value is now mandatory for Upload Ready status on the CAS Details page.

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Previous UK Study

Derivation Steps:

1. Derive from the CAS Details record. Yes is derived as *true*, No is derived as *false*.

Previous Academic Level

Upload Extract Data page: Evidence Details

XML Tag: <PreviousAcademicLevel>

Mandatory: No

Pages Used:

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Page	Page Element
CAS Details	Previous Academic Level

Derivation Steps:

1. Derive as the short translate value from the CAS Details record.
2. Derive as null.

Note. On the CAS Details page, a Previous Academic Level value is mandatory for Upload Ready status if Previous UK Study is *Yes*.

Current Level Comparison

Upload Extract Data page: Evidence Details

XML Tag: <CurrentPreviousCourseLevelComparison>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Current Level Comparison

Derivation Steps:

1. Derive as the short translate value (upper case) from the CAS Details record.
2. Derive as null.

Note. On the CAS Details page, a Current Level Comparison value is mandatory for Upload Ready status if Previous UK Study is *Yes*.

Progression Justification

Upload Extract Data page: Evidence Details

XML Tag: <ProgressionJustification>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Progression Justification

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

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Note. On the CAS Details page, a Progression Justification value is mandatory for Upload Ready status if Current Level Comparison is *L* or *S*.

Accommodation Provided

Upload Extract Data page: Financial Details

XML Tag: <AccommodationProvided>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Accommodation Provided

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

Accommodation Fees Included

Upload Extract Data page: Financial Details

XML Tag: <CourseFeeIncludesAccomodationCosts>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Accommodation Fee Included

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

First Year Course Fees

Upload Extract Data page: Financial Details

XML Tag: <CourseFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

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Page	Page Element
CAS Details	First Year Course Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as *0*, if the First Year Course Fees is *0* on the CAS Details page.

Course Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <CourseFeesPaidToDate>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Course Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Accommodation Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <AccommodationFeesPaidToDate>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Accommodation Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

First Year Boarding Fees

Upload Extract Data page: Financial Details

XML Tag: <BoardingFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

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Page	Page Element
CAS Details	First Year Boarding Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as *0*, if the First Year Boarding Fees is *0* on the CAS Details page.

Boarding Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <BoardingFeesPaidToDate>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Boarding Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

ATAS Certificate Required

Upload Extract Data page: Certification

XML Tag: <CourseRequiresATAS>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	ATAS Certificate Required

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

Dean's Certificate Required

Upload Extract Data page: Certification

XML Tag: <PostgraduateDeanCertificateRequired>

Mandatory: Yes

Pages Used:

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Page	Page Element
CAS Details	Dean's Certificate Required

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

Offer Documents

Upload Extract Data page: Documentation

XML Tag: <DocumentsUsedToObtainOffer>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Offer Documents

Derivation Steps:

1. Derive from the CAS Details record.

Update Extract Fields

This section discusses how the Create Extract process derives the field values for the Update extract.

Update File ID

Update Extract Data page: Header

XML Tag: <BulkUpdateFileId>

Mandatory: Yes

Pages Used:

Page	Page Element
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Update File ID Override

Derivation Steps:

1. Derive from the Update File ID Override parameter of the Create Extract process.
2. Derive in the format *INST_UPDATE_YYYY_MM_DD_nn* (for example, PSUNV_UPDATE_2009_09_27_01), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

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CAS Number

Update Extract Data page: Header

XML Tag: <CASNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	CAS Number

Derivation Steps:

1. Derive from the CAS Details page.

First Year Course Fees

Update Extract Data page: Financial Details

XML Tag: <CourseFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	First Year Course Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as *0*, if the First Year Course Fees is *0* on the CAS Details page.

Course Fees Paid

Update Extract Data page: Financial Details

XML Tag: <CourseFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

Page	Page Element
CAS Details	Course Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note. An error message is logged if none of the Fees Paid fields contains a value greater than zero.

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Accommodation Fees Paid

Update Extract Data page: Financial Details

XML Tag: <AccommodationFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

Page	Page Element
CAS Details	Accommodation Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note. An error message is logged if none of the Fees Paid fields contains a value greater than zero.

Boarding Fees Paid

Update Extract Data page: Financial Details

XML Tag: <BoardingFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

Page	Page Element
CAS Details	Boarding Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note. An error message is logged if none of the Fees Paid fields contains a value greater than zero.

Report File Fields

This section discusses how the Create Extract process derives the field values for the Report extract.

Report File ID

Report Extract Data page: Header

XML Tag: <BulkReportingID>

Mandatory: Yes

Pages Used:

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Page	Page Element
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Report File ID Override

Derivation Steps:

1. Derive from the Report File ID Override parameter of the Create Extract process.
2. Derive in the format *INST_REPORT_YYYY_MM_DD_nn* (for example, PSUNV_REPORT_2009_09_27_01), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

CAS Number

Report Extract Data page: Header

XML Tag: <CASNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	CAS Number

Derivation Steps:

1. Derive from the CAS Details record.

Expected Enrollment Date

Report Extract Data page: Report Details

XML Tag: <ExpectedEnrollmentDate>

Mandatory: Yes

Pages Used:

Page	Page Element
Report Details (Student Admissions, PBI Processing, CAS Maintenance, Report Details)	Expected Enrollment

Derivation Steps:

1. Derive from the CAS Details record

Notes

Report Extract Data page: Report Details

XML Tag: <Notes>

Mandatory: No

Pages Used:

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Page	Page Element
Report Details (Student Admissions, PBI Processing, CAS Maintenance, Report Details)	Notes

Derivation Steps:

1. Derive from the CAS Details record
2. Derive as *NULL ERROR.*

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