Managing Batch Academic Advisement Reports

Understanding Batch Academic Advisement Reports

Your institution has several ways to generate report requests in batch. The Population Selection process provides a configurable selection tool that enables users to create groups of people or organizations. The following tools are available for use in the Population Selection process:

- PS Query
- Equation Engine
- File Upload

Your institution can use the report identifier to group individual requests and process them as a group. The batch process consists of these steps:

1. Request advisement reports.
2. Process the requests (that is, generate the reports).
3. Print the reports in batch. Printing the reports generates results and creates a .pdf of the reports.
4. Purge reports and report requests.

You can generate what-if reports in batch for both students and prematriculated students (for example, prospective students), provided the prematriculated students have an EMPLID. Note that you can generate advisement reports without the what-if parameters (degree audit based on current academic structure) for active students only.

These topics also include information about purging the advisement transcript data from the analysis database tables.

Prerequisites

Before you can process advisement reports, you must:

- Select the Academic Advisement option on the Installation Student Administration page.
- Set up advisement report types.
- Define additional report identifiers, as needed.

See the product documentation for "Understanding Installation Setup and System Defaults *(PeopleSoft Campus Solutions 9.0: Application Fundamentals)*"

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See the product documentation for Setting Up Advisement Report Types

Common Elements Used in Managing Batch Academic Advisement Reports

Report Manager Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages, which show you a description of the report and the distribution list.

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Run Click to access the Process Scheduler Request page, where you can initiate the process

Academic Institution Enter the institution for which you want to process the batch academic advisement reports.

Report Type Enter the type of advisement report you want to generate.

Report Identifier Enter the report identifier. The report identifier is useful for grouping advisement reports.

You can define additional report identifiers, as needed.

Generating Batch Academic Advisement Report Requests

This section discusses how to:

- Generate batch advisement report requests.
- Generate batch advisement reports.
- Print batch advisement report requests.

Pages Used to Process Batch Advisement Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Generate Report Requests	SAA_RUNCTL_RPTRQST	Academic Advisement, Advisement Processes, Generate Report Requests	Define the report request.
Generate Advisement Reports	SAA_RC_RPTGEN	Academic Advisement, Advisement Process, Generate Advisement Reports	Define the run control parameters for the report.

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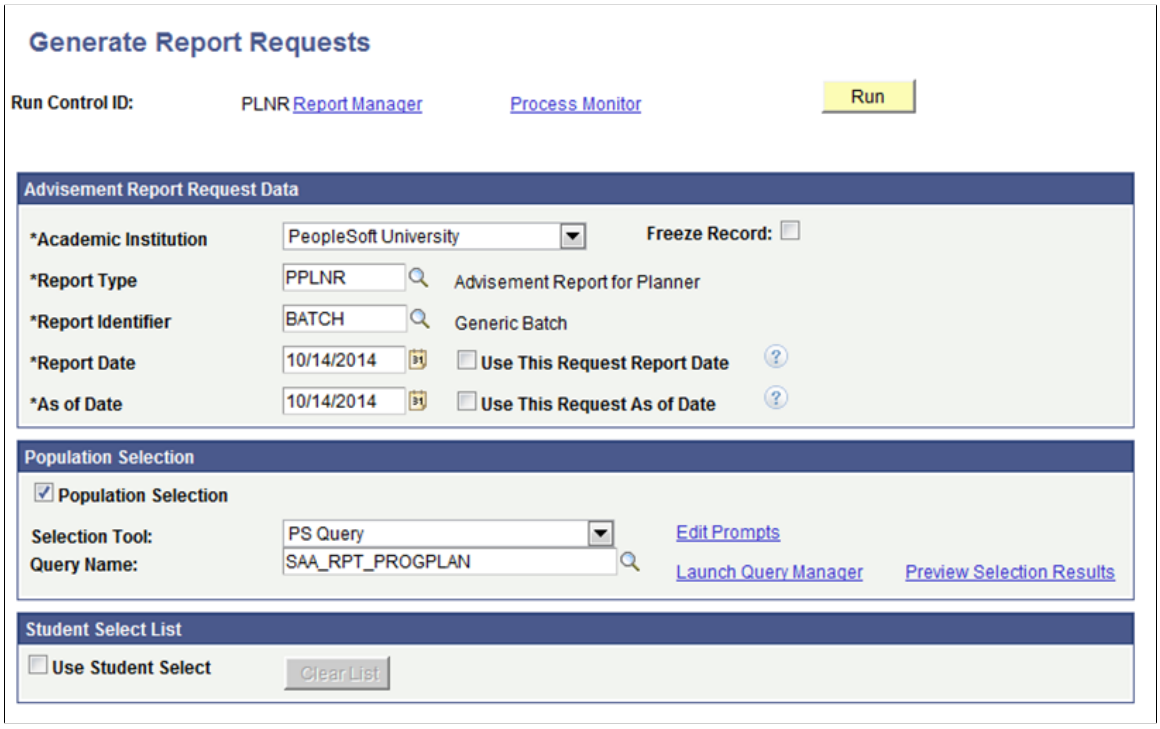
Page Name	Definition Name	Navigation	Usage
Print Batch Reports	SAA_RC_RPTPRINT	Academic Advisement, Advisement Processes, Print Batch Reports	Define the printing parameters for the report.

Generating Batch Advisement Report Requests

Access the Generate Report Requests page (Academic Advisement, Advisement Processes, Generate Report Requests).

Image: Generate Report Requests page

This example illustrates the fields and controls on the Generate Report Requests page. You can find definitions for the fields and controls later on this page.



Advisement Report Request Data

Report Date

Bundle 35. New behavior.

When you create a new request, the Report Date field displays the current date until you select a Report Type value. Then the Report Date field value displays the appropriate Report Date based on the advisement report type setup.

If the default value defined for the advisement report type is *Current Date*, then you can view two additional items on the page: the Use This Request Report Date check box and the ? icon, which offers explanatory text.

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As of Date

Bundle 35. New behavior.

Reflects the As of Date value identified in the report type setup. When you access the page, the As of Date field value displays the value defined in the Installation Academic Advisement component. This remains the default value until you select the Report Type field value on the page. Then the value will reflect the advisement report type setup.

If the default value defined for the advisement report type is *Current Date*, then you can view two additional items on the page: the Use This As of Date check box and a ? icon, which offers explanatory text.

Use This Request Report Date

Bundle 35. New check box.

Select this option for the request process to use the user-defined date as Report Date. If the check box is not selected, then the Report Date on the request is updated with the current date.

Note: This check box appears only when the Report Date value defined in the advisement report type is *Current Date*.

Use This Request As of Date

Bundle 35. New check box.

Select this option for the request process to use the user-defined date as the As of Date. If the check box is not selected, then the As of Date on the request is updated with the current date.

Note: This check box appears only when the As of Date field value defined in the advisement report type is *Current Date*.

Mouse-over the icon to read explanatory text for the check box. You can use Message Catalog to customize these texts:

- Use this Request As of Date check box: Entry 14530, 13.
- Use this Request Report Date check box: Entry 14530, 14.

Freeze Record

Select to prevent this request from being purged during a subsequent academic advisement purge process.

Population Selection

This group box appears when the *Population Selection* process is selected.

Population selection is a method of selecting the IDs to process a specific transaction. The Population Selection group box appears on the run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the set up of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.

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If your institution uses a specific selection tool (PS Query, Equation Engine equation, or extended file) to identify IDs for a specific transaction, you must use it.

Several queries have been created as "default" queries to enable your institution to select students in the same manner as delivered in 9.0. They are:

- SAA_RPT_ACADLEVEL (AA Report Query by Acad Level).
- SAA_RPT_ADVISOR (AA Report Query by Advisor).
- SAA_RPT_CAREER (AA Report Query by Career).
- SAA_RPT_PROGPLAN (AA Report Query by Plan).
- SAA_RPT_PROGRAM (AA Report Query by Program).
- SAA_RPT_STUDENT_GROUPS (AA Report Query by Student Group).
- SAA_RPT_ADM_CARPROG (AA Report Query by Admission Program).
- SAA_RPT_ADM_PROGPLAN (AA Report Query by Admission Plan).
- SAA_RPT_ADM_SUBPLAN (AA Report Query by Admission Subplan).
- SAA_RPT_PROSPECT_CAR (AA Report Query by Prospect).

See "Using the Population Selection Process *(PeopleSoft Campus Solutions 9.0: Campus Community)*".

Student Select List

Use Student Select	Select if you want specific IDs for inclusion in the process. When the Use Student Select check box is selected, the Clear List button is enabled.
Clear List	Click to remove all values the Student Select List group box.

Use Career Simulation

If you select a what-if advisement report type, the Use Career Simulation check box appears on the page. If you then select the check box, additional fields become available for your use. Use those fields to define the parameters of your what-if scenario for the desired population. You can generate what-if reports for students or even prematriculated students (as long as the prematriculated students have an EMPLID).

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This example shows the what-if scenario parameters for a population.

Image: Example of Generate Report Requests page with the what-if group boxes (1 of 2)

This example illustrates the fields and controls on the Generate Report Requests page with a what-if scenario (1 of 2). You can find definitions for the fields and controls later on this page.

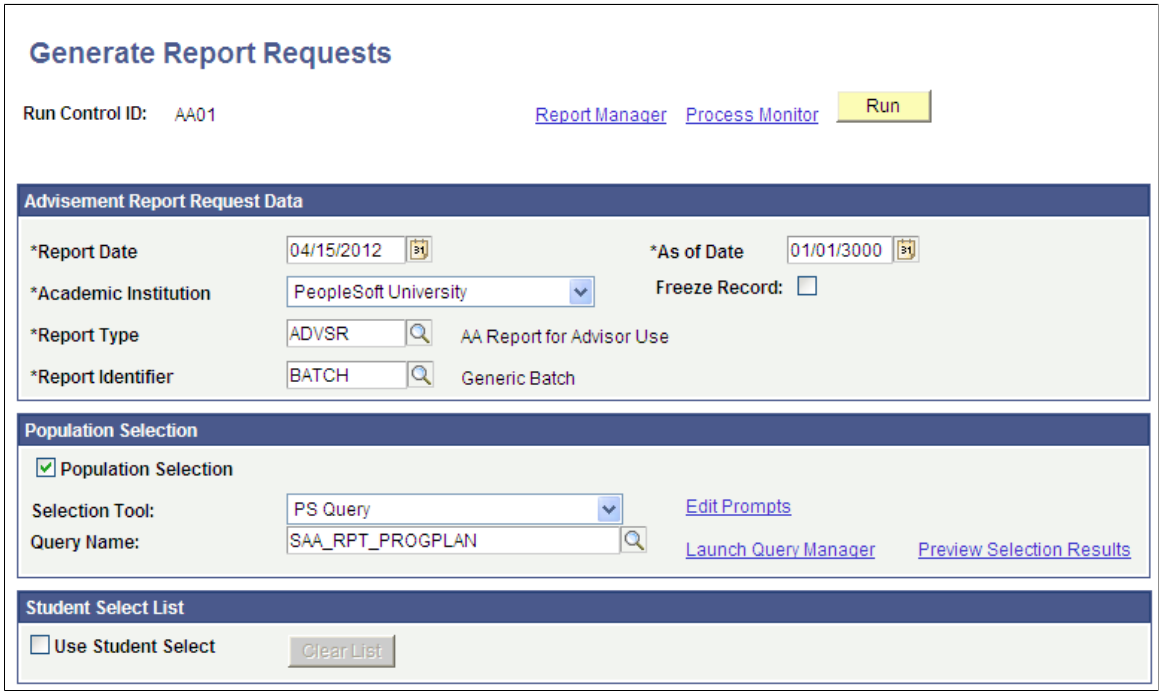

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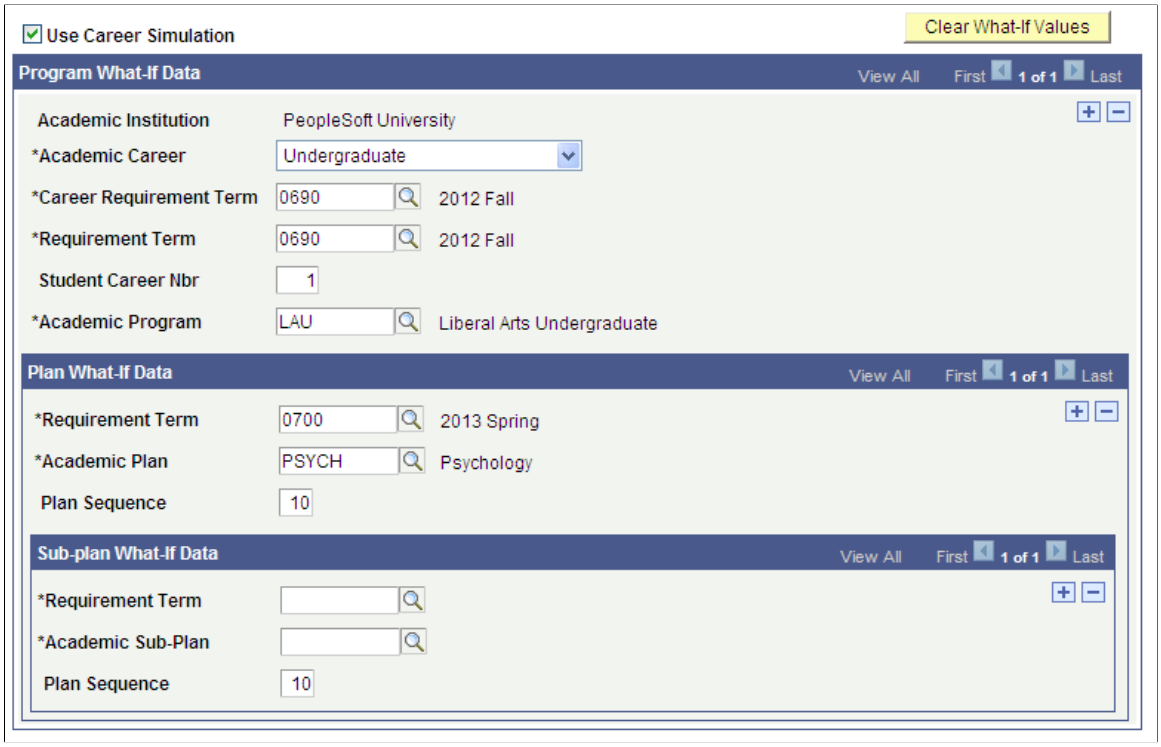
Image: Example of Generate Report Requests page with the what-if group boxes (2 of 2)

This example illustrates the fields and controls on the Generate Report Requests page with a what-if scenario (2 of 2). You can find definitions for the fields and controls later on this page.



The following lists the field descriptions for the *Program What-If Data* group box.

Academic Institution This display-only field shows the institution selected in the Advisement Report Request Data group box.

Academic Career Enter the value for the what-if career.

Career Requirement Term Enter a what-if career requirement term value for the career override. The system uses this value to select the correct effective-dated career-level requirement groups.

Requirement Term Enter the what-if academic program requirement term. The system uses this value to select the appropriate effective-dated program-level requirement groups.

Student Career Number The default value on this page is 1. You can change the student career number for use in the scenario.

Academic Program Enter the academic program value that you want to use in the what-if scenario.

You can use one or many programs in the what-if scenario.

The following lists the field descriptions for the *Plan What-If Data* group box.

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Requirement Term Enter the requirement term for the what-if plan. The system uses this value to select the appropriate effective-dated plan-level requirement groups.

Academic Plan Enter an academic plan for use in the what-if scenario.

The system uses this value to select the correct effective-dated plan-level requirement groups.

Plan Sequence Displays a sequence number. This sequential number is supplied by the system.

This number indicates the order or sequence of multiple plans, if any. The plan with the lowest sequence number is considered primary within the plan. You can override the number.

The following lists the field descriptions for the *Sub-plan What-If Data* group box.

Requirement Term Enter the requirement term for the what-if subplan. The system uses these values to select the appropriate effective-dated subplan-level requirement groups.

Academic Sub-Plan Enter an academic subplan for use in the what-if scenario. The system uses this value to select the appropriate effective-dated subplan-level requirement groups.

Plan Sequence Displays a sequence number. This sequential number is supplied by the system. This number indicates the order (or sequence) of multiple subplans, if any. The subplan with the lowest sequence number is considered primary within the subplan. The user can override the number, if necessary.

Click the Clear What-If Values button to clear values you entered in the Program What-If Data, Plan What-If Data, and Sub-plan What-If Data group boxes.

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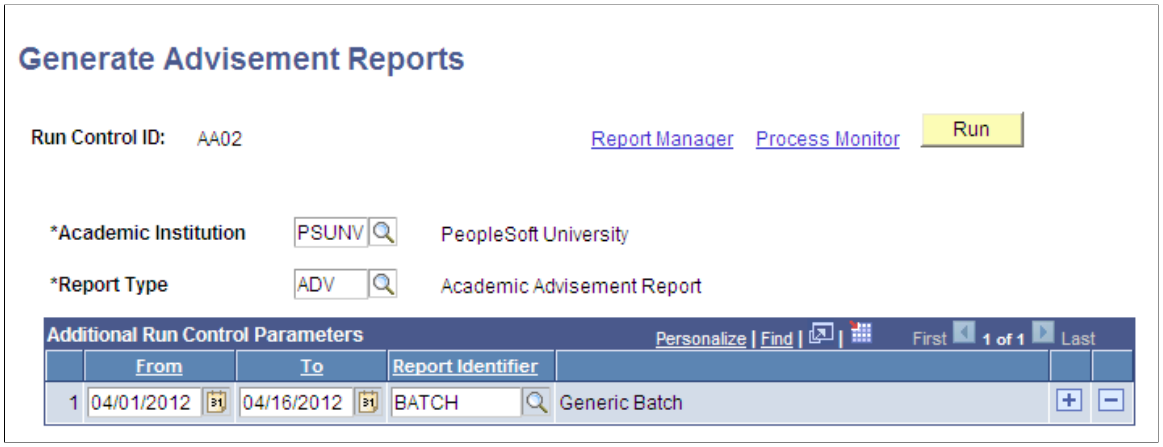
Generating Batch Advisement Reports

Access the Generate Advisement Reports page (Academic Advisement, Advisement Process, Generate Advisement Reports).

Image: Generate Advisement Reports page

This example illustrates the fields and controls on the Generate Advisement Reports page. You can find definitions for the fields and controls later on this page.



Additional Run Control Parameters

From and **To**

Enter a valid date range to filter report requests based on the report date on the individual requests. If no date range is entered, all report dates are considered.

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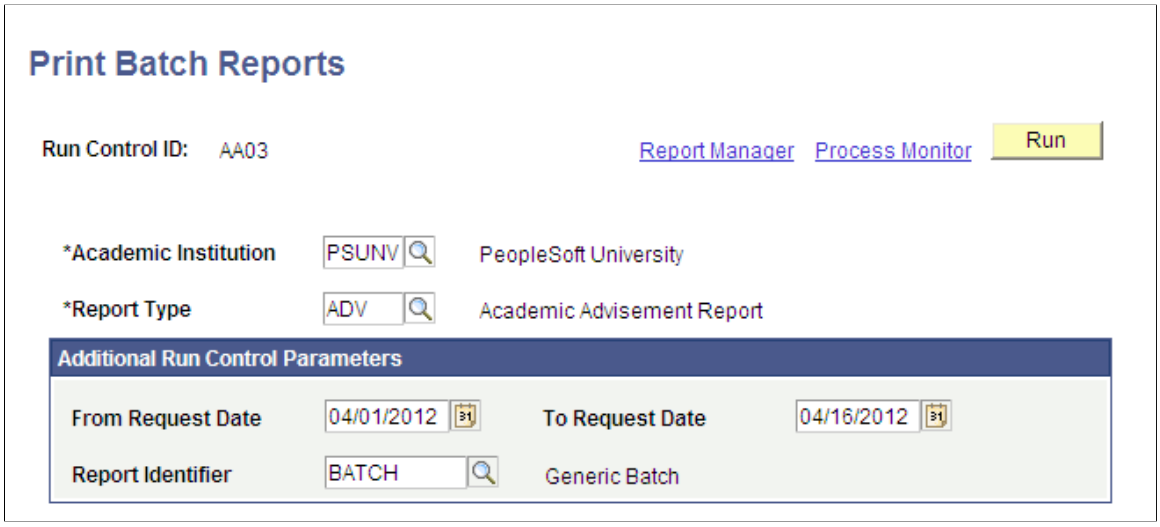
Printing Batch Advisement Reports

Access the Print Batch Reports page (Academic Advisement, Advisement Processes, Print Batch Reports).

Image: Print Batch Reports page

This example illustrates the fields and controls on the Print Batch Reports page. You can find definitions for the fields and controls later on this page.



Additional Run Control Parameters

From Request Date and **To Request Date**

Enter a valid date range to filter report requests based on the report date on the individual requests. If no date range is entered, all report dates are considered.

Updating Self-Service Advisement Reports

This section provides an overview of the self-service advisement report update process and discusses how to update self-service advisement reports.

Understanding the Self-Service Advisement Report Update Process

Use this update process if your institution wants to generate advisement reports based on the synchronization options on the Installation Academic Advisement (SAA_INSTALL_AA) page. The update process identifies students whose synchronize flag is set to Y and who meet the institution, career, and program parameters identified on the Update Self-Service Advisement Reports page. The process determines whether a report request exists for the self-service report types defined in the Institution Table for a given student. If a request does not exist, one will be created and processed. If a request does exist, the process checks to see if report results are available for the request. If not, then the request will be reprocessed. If results are available, the date/time stamp on the request is compared to the date/time stamp on the STDNT_CAREER record. If the report date/time stamp is earlier than the STDNT_CAREER

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date/time stamp, the report is regenerated. After both report types are checked, the system sets the synchronization flag to N.

Note: This is the only process that sets the synchronization flag on the student career record back to N.

Page Used to Update Self-Service Advisement Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Update Self Service Reports	SAA_RUNCTL_TRGR	Academic Advisement, Advisement Processes, Update Self-Service Reports	Define the academic institution, academic career, and academic program parameters and update the self-service advisement reports for students. Reset the synchronization flag on the student career record (STDNT _CAREER) to N.

Updating a Self-Service Advisement Report

Access the Update Self-Service Reports page (Academic Advisement, Advisement Processes, Update Self-Service Reports).

Image: Update Self-Service Reports page

This example illustrates the fields and controls on the Update Self-Service Reports page. You can find definitions for the fields and controls later on this page.

Academic Institution Enter the academic institution for which you want an update.

Academic Career Enter the academic career for which you want an update.

Academic Program Enter the program for which you want an update. If you do not enter a value, the process will be applied to all programs within the specified career.

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Purging Academic Advisement Reports

This section discusses how to purge academic advisement report results information from the report results tables.

See the product documentation for Understanding Advisement Report Result Tables

Pages Used to Purge Academic Advisement Reports and Records

Page Name	*Definition Name*	*Navigation*	*Usage*
Purge Report Results	SAA_RC_RPT_PURGE	Academic Advisement, Advisement Processes, Purge Report Results	Purge advisement report requests and the data in the results tables. The system deletes advisement report requests and results data within the parameters that you specify.
Process Scheduler Request	PRCSRQSTDLG	Click the Run button on the Purge Report Results page.	Initiate purging advisement reports.
Purge Analysis Database Tables page	SAA_RUNCTL_PURGE	Academic Advisement, Advisement Processes, Purge Analysis Database Tables	Initiate purging of data from the analysis database tables based on run control criteria. Optionally purges transcript requests and log data

Purging Academic Advisement Report Results

Generating advisement reports causes a vast amount of data to be inserted into the report results tables. So it is important to remove unnecessary data. Failing to remove unneeded data will waste space in the database and potentially increase processing times.

The Purge Report Results page enables you run a process that removes data from the result tables. You can delete all results table data or some data, based on specific criteria. In addition to deleting the results table data, you can delete corresponding report request and log data. To summarize, you can use the options on the page to perform the following actions:

- Purge all data from the results tables and update the report request error log stating that the data has been deleted for the request.
- Purge all data from the report results tables and delete the corresponding report requests.
- Purge some data from the results tables and update the request error log stating that the report results data has been deleted for the request.
- Purge some data from the report results tables and delete the corresponding report request records.

The purge process will generate messages in the message log that track the number of records purged or updated in each table. Note that the message log does not track individual record information, only a summary of the actions for each table. You can write SQL using Query Manager to verify that the process removed the correct data from the report results tables.

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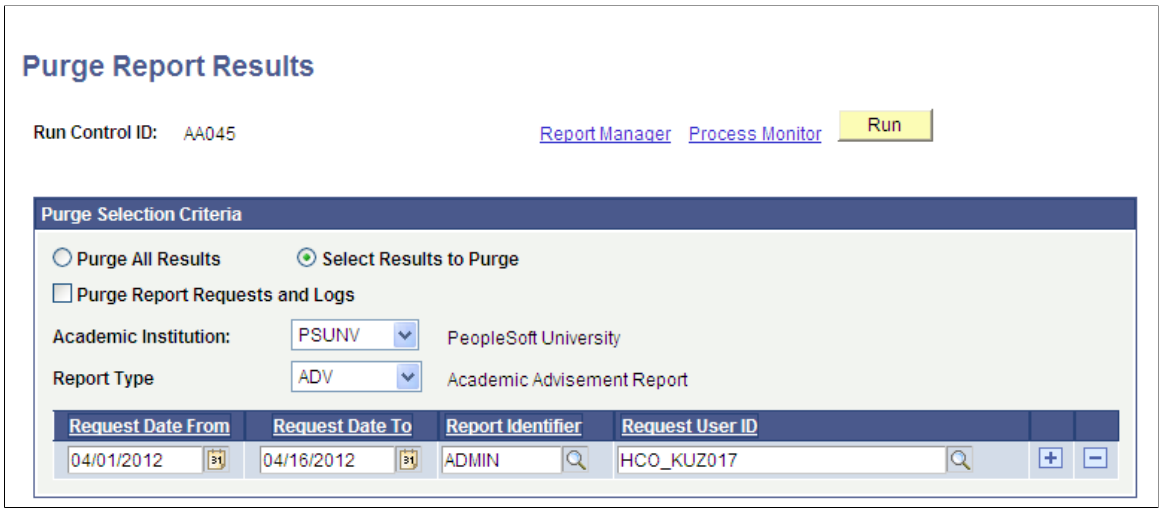
When you purge data from the results tables (but not from the report request and log tables), the process adds an entry into the error log for the report request stating that the report results data has been purged.

Access the Purge Report Results page (Academic Advisement, Advisement Processes, Purge Report Results).

Image: Purge Report Results page

This example illustrates the fields and controls on the Purge Report Results page. You can find definitions for the fields and controls later on this page.



Report Manager Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages.

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Run Click to access the Process Scheduler Request page, where you can initiate the purge.

Purge Selection Criteria

Purge All Results Select to delete all data in the results tables.

Warning! Selecting this option will override the Freeze Record flag set on the report request record and will delete all data from the results tables. If you also select the Purge Report Requests and Logs option, all associated request records will be purged, even if the Freeze Record flag is set.

Select Results to Purge This option is selected by default. When it is selected, additional fields are available on the page so that you can specify the report results that you want to delete. You must select an institution and report type, and then you can select additional parameters, including a range of dates, report identifier, or user ID of the person who requested the reports.

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Purge Report Requests and Logs	Select to delete report request records, including logs, along with the selected report results.
Academic Institution	Select the institution for which you want to purge academic advisement reports. This value determines the availability of report types in the Report Type field.
Report Type	Select the type of advisement report for which you want to purge reports.
Request Date From and **Request Date To**	Enter a valid date range to filter report requests based on the report date on the individual report requests. If no values are entered, all report dates are considered.
Report Identifier	Enter the value that identifies the report.
Request User ID	Enter a valid user ID if you want to purge all requests made by a specific user.

Purging Advisement Transcripts

This section discusses how to purge the advisement transcript results from the analysis database tables. This section also includes information about purging the analysis database tables. If your institution generates advisement transcripts and sends results to the analysis database, you will want to remove unneeded data. The analysis database purge feature enables you to purge both transcript requests and data in the analysis database tables.

See Understanding the Analysis Database

See Producing an Online Academic Advisement Transcript Report

Pages Used to Purge Academic Advisement Transcripts

Page Name	*Definition Name*	*Navigation*	*Usage*
Purge Analysis Database Tables	SAA_RUNCTL_PURGE	Academic Advisement, Advisement Processes, Purge Analysis Database Tables	Initiate purging of data from the analysis database tables based on run control criteria. Optionally purges transcript requests and log data.

Purging the Analysis Database

The analysis database enables you to analyze data collected from a batch or individual run of advisement transcripts. Because the process of sending data to the analysis database tables inserts a large amount of data into the database, it is important to remove unnecessary data. Failing to remove unneeded data will waste space in the database and potentially increase processing times.

The Purge Analysis Database Tables page enables you run a process that removes data from the analysis database tables. You can delete all analysis database table data or some data, based on specific criteria.

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In addition to deleting the analysis database data, you can delete corresponding transcript request and log data. To summarize, you can use the options on the page to perform the following actions:

- Purge all data from the analysis database tables and update the transcript error log stating that the analysis database data has been deleted for the request.
- Purge all data from the analysis database tables and delete the corresponding transcript requests (including headers, details, results, and error log).
- Purge some data from the analysis database tables and update the transcript error log stating that the analysis database data has been deleted for the request.
- Purge some data from the analysis database tables and delete the corresponding transcript request records (including headers, details, results, and error log).

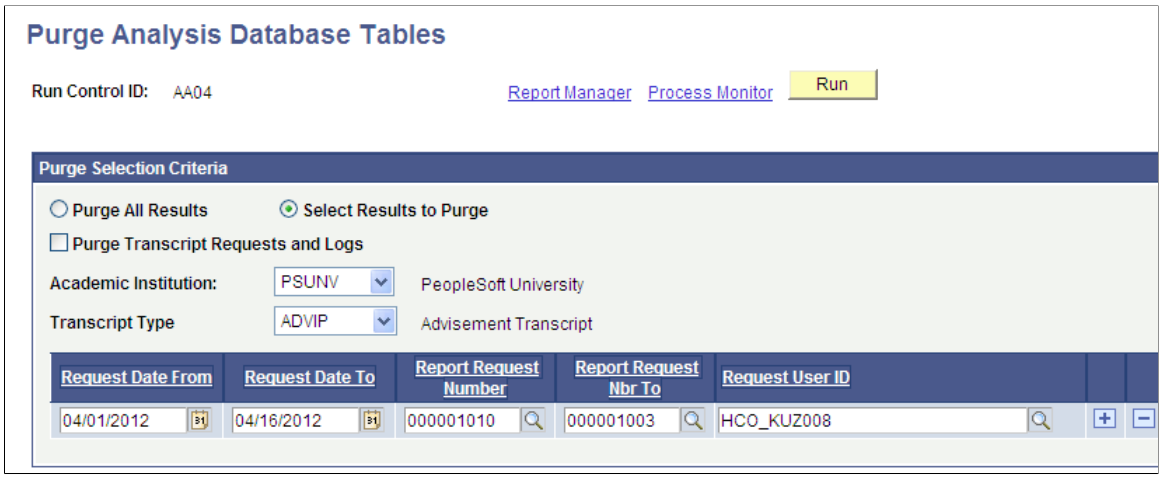
The purge process will generate messages in the message log that track the number of records purged or updated in each table. Note that the message log does not track individual record information, only a summary of the actions for each table. You can write SQL using Query Manager to verify that the process removed the correct data from the analysis database tables.

When you purge data from the analysis database (but not from the transcript request and log tables), the process adds an entry into the error log for the transcript request stating that the analysis database data has been purged.

Access the Purge Analysis Database Tables page (Academic Advisement, Advisement Processes, Purge Analysis Database Tables).

Image: Purge Analysis Database Tables page

This example illustrates the fields and controls on the Purge Analysis Database Tables page . You can find definitions for the fields and controls later on this page.



Purge Selection Criteria

Purge All Results Select to delete all results in the Analysis Database.

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	Warning! Selecting this option will override the Freeze Record flag set on the report request record and will delete all data from the analysis database tables. If you also select the Purge Transcript Requests and Logs option, all associated transcript request records will also be purged, even if the Freeze Record flag is set.
Select Results to Purge	This option is selected by default. After selecting this option, enter your selection criteria.
	Note: If you select this option, the process obeys the Freeze Record flag set on the transcript request record.
Purge Transcript Requests and Logs	Select to delete transcript requests and logs in addition to purging the analysis database table data. If the analysis database data is already purged, you cannot go back and select this check box and rerun the purge process.
Academic Institution	Select the institution for which you want to purge academic advisement reports (transcripts). This value determines the availability of report types in the Transcript Type field.
Transcript Type	Select the type of transcript (advising, for example) for which you want to purge data.
Request Date From and **Request Date To**	Enter a valid date range to filter report requests based on the report date on the individual requests. If no values are entered, all report dates are considered.
Report Request Number and **Report Request Number To**	Enter values in these fields to specify purge parameters in more detail. The system purges report requests for these report request numbers.
Request User ID	Enter a valid user ID if you want to purge all requests that were created by a specific user.

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