Modifying Reports with Geoloc and Residency Data in BusinessObjects Universes

Overview

This document provides information for use by those who use BusinessObjects to report Geoloc and Residency data. It provides the steps to modify reports, including 1) how to identify the result objects and conditions to be modified and 2) how to modify the result objects and conditions so that data is being selected from the appropriate folders. This document includes instructions on how to modify reports for each of the following BusinessObjects universes:

- SA02 Recruiting and Admissions
- SA06 Admissions Snapshot
- SA03 Student Records
- SA04 Financial Aid and Student Financials

Note: Residency Appeal does not apply to the SA04 FinAid/StuFin universe.

Recently the University signed an agreement with BusinessObjects to upgrade our current software to a Web-based version of BusinessObjects. In preparation for this future BusinessObjects upgrade, a change was made to some BusinessObjects universes to handle how some effective dates and effective terms are selected. This change relates to effective term prompts for Geoloc and Residency Official and new Geoloc, Residency, and Residency Appeal folders.

Business Process

Geoloc, Residency, and Residency Appeal data are effective dated by term. This means the data is for the whole term, and there may be one or multiple terms of data for a given individual. In some cases, a user may wish to display a specific term of data for an individual, while in other cases, a user may wish to display data for more than one term. This procedure will assist users that wish to display Geoloc, Residency and/or Residency Appeal data for an individual with more than one term of data.

There are two methods to help you determine if a report contains Geoloc, Residency Off, and/or Residency Appeal data, and if the result objects and conditions need to be modified based on the folders from which the data is being selected. These include:

- BusinessObjects SQL
- DocAnalyze: This method is useful when creating, modifying, or analyzing reports and is accessed via Citrix. It lists:
  - each object in Results and Conditions, along with the class (folder) that the object came from (information not easily accessible in BusinessObjects)
  - every user-created variable in a report, including the variable name, qualification (dimension, measure, detail) and underlying formula

Based on the universe used to select data for your report, refer to the appropriate page for details about how to modify your report:

<table>
<thead>
<tr>
<th>If the query selected data from this universe...</th>
<th>Refer to page...</th>
</tr>
</thead>
<tbody>
<tr>
<td>SA03 Student Records</td>
<td>2</td>
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<td>SA02 Recruiting and Admissions</td>
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<tr>
<td>SA06 Admissions Snapshot</td>
<td></td>
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<tr>
<td>SA04 Financial Aid/Student Financials</td>
<td>10</td>
</tr>
</tbody>
</table>
Business Process (continued)

If you have questions or need assistance, contact the MAIS Help Desk at 734-936-7000 and select option 7, or send e-mail to maishelpdesk@umich.edu.

SA03 Student Records Universe

Users may need to modify ad hoc queries and/or customized repository reports that contain Geoloc, Residency Official, and/or Residency Appeal data, if the data should NOT be linked to the individual’s enrollment term.

Part 1: Identify Objects To Be Modified

Using steps 1 through 3, users can identify the result objects and objects in conditions to be modified using SQL. Alternately, steps 1 – 3 can be done using DocAnalyze. (Documentation about how to use DocAnalyze is listed at the end of this document.)

Note: This document provides information and examples using SQL.

1. Retrieve your report and click on your Edit Data Provider button.

Sample Query

2. Click the SQL button.
SA03 Student Records Universe (continued)

Part 1: Identify Objects To Be Modified (continued)

3. Review your SQL for the query. Identify any result objects and/or objects in conditions that are selected from:
   • Stdnt_Car_Term_Residency_Off
   • Stdnt_Car_Term_Residency_Apeal
   • Stdnt_Car_Term_Geoloc

If your query has conditions on Geoloc or Residency data, you will find them at the bottom of the SQL, with one of the table names Stdnt_Car_Term_Geoloc, Stdnt_Car_Term_Residency_Off, or Stdnt_Car_Term_Residency_Apeal. In this example, there are no conditions on Geoloc or Residency data.
SA03 Student Records Universe (continued)

Part 2: Modify the Report

After identifying the result objects and the objects in conditions to be modified, follow steps 4 – 8 to modify your report. Geoloc, Residency Off, and Residency Appeal should be modified if the data should NOT be linked to the individual's enrollment term. If no result objects or objects in conditions are identified, no further action is required.

4. In the query panel, remove the result objects and objects in conditions, if applicable, selected from:
   - Stdnt_Car_Term_Residency_Off
   - Stdnt_Car_Term_Residency_Apeal
   - Stdnt_Car_Term_Geoloc

5. Replace them with the identically-named result objects and objects in conditions from Residency Off, Residency Appeal, and Geoloc folders under the Person Data folder.
SA03 Student Records Universe (continued)

Part 2: Modify the Report (continued)

6. Click the SQL button and confirm that the Residency and Geoloc result objects are being selected from the Residency_Off, Residency_Apeal, or Geoloc tables. You should no longer see the Stdnt_Car_Term prefix on these table names.

7. When you run your modified query, a new prompt displays for the new options. In the case of the sample query, there are new prompts for Residency Off Effective Term, and Geoloc Effective Term options.

8. After rerunning the query, review and verify the query results.
SA02 Recruiting and Admissions and SA06 Admissions Snapshot Universes

Users may need to modify ad hoc queries and/or customized repository reports that contain Geoloc, Residency Official, and/or Residency Appeal data, if the data should NOT be linked to the individual’s admit term.

**Part 1: Identify Objects To Be Modified**

Using steps 1 through 3, users can identify the result objects and objects in conditions to be modified using SQL. Alternately, steps 1 – 3 can be done using DocAnalyze. (Documentation about how to use DocAnalyze is listed at the end of this document.)

**Note:** This document provides information and examples using SQL.

1. Retrieve your report and click on your Edit Data Provider button.

### Sample Query

![Sample Query](image)

2. Click the SQL button.

### Query Pane - iSA02 Recruiting and Admissions Universe

![Query Pane](image)
SA02 Recruiting and Admissions and SA06 Admissions Snapshot Universes (continued)

Part 1: Identify Objects To Be Modified (continued)

3. Review your SQL for the query. Identify any result objects and/or objects in conditions that are being selected from the following:

- Adm_Appl_Prog_Geoloc
- Adm_Appl_Prog_Residency_Off
- Adm_Appl_Prog_Residency_Apeal

Result objects selected from Adm_Appl_Prog_Residency_Off, Adm_Appl_Prog_Residency_Apeal, and Adm_Appl_Prog_Geoloc

If your query has conditions on Geoloc or Residency data, you will find them at the bottom of the SQL, with one of the table names Adm_Appl_Prog_Geoloc, Adm_Appl_Prog_Residency_Off, or Adm_Appl_Prog_Residency_Apeal. In this example, there are no conditions on Geoloc or Residency data.
SA02 Recruiting and Admissions and SA06 Admissions Snapshot Universes (continued)

**Part 2: Modify the Report**

After identifying the result objects and the objects in conditions to be modified, follow steps 4 - 8 to modify your report. Geoloc, Residency Off, and Residency Appeal should be modified if the data should NOT be linked to the applicant’s admit term. If no result objects or objects in conditions are identified, no further action is required.

4. In the query panel, remove the result objects and objects in conditions selected from:
   - Adm_Appl_Prog_Geoloc
   - Adm_Appl_Prog_Residency_Off
   - Adm_Appl_Prog_Residency_Apeal

5. Replace them with the identically-named result objects from Geoloc, Residency Off, and/or Residency Appeal folders under the Person Data folder.
SA02 Recruiting and Admissions and SA06 Admissions Snapshot Universes (continued)

Part 2: Modify the Report (continued)

6. Click the SQL button and confirm that the Residency and Geoloc result objects are being selected from the Residency_Off, Residency_Apeal, or Geoloc tables. You should no longer see the Adm_Appl_Prog_prefix on these table names.

```
SELECT M_RADW1.PERSONAL_DATA.EMPLID, M_RADW1.PERSONAL_DATA.NAME, M_RADW1.GEOLOC.EFFECTIVE_TERM, M_RADW1.GEOLOC.GEOLOC_COUNTRY, M_RADW1.RESIDENCY_OFF.EFFECTIVE_TERM, M_RADW1.RESIDENCY_OFF.RESIDENCY, M_RADW1.RESIDENCY_APEAL.EFFECTIVE_TERM, M_RADW1.RESIDENCY_APEAL.RESIDENCY_APEAL_EFFECTDATE, M_RADW1.RESIDENCY_APEAL.RESIDENCY_APEAL_APPEAL_STATUS FROM M_RADW1.PERSONAL_DATA, M_RADW1.GEOLOC, M_RADW1.RESIDENCY_OFF, M_RADW1.RESIDENCY_APEAL WHERE
```

7. When you run the modified query, a new prompt displays for the new options. In the case of the sample query, there are new prompts for Geoloc Effective Term and Residency Off Effective Term options.

8. After rerunning the query, review and verify the query results.
SA04 FinAid/StuFin Universe

Users may need to modify ad hoc queries and/or customized repository reports that contain Geoloc and/or Residency Official data, if the data should NOT be linked to the student FA term.

Part 1: Identify Objects To Be Modified

Using steps 1 through 3, users can identify the result objects and objects in conditions to be modified using SQL. Alternately, steps 1 – 3 can be done using DocAnalyze. (Documentation about how to use DocAnalyze is listed at the end of this document.)

**Note:** This document provides information and examples using SQL.

1. Retrieve your report and click on your Edit Data Provider button.

Sample Query

![Sample Query Image]

2. Click the SQL button.

![Sample Query Image]
SA04 FinAid/StuFin Universe (continued)

Part 1: Identify Objects To Be Modified (continued)

3. Review the SQL for the query. Identify any result objects and/or objects in conditions that are selected from:
   - Stdnt_FA_Term_Residency_Off
   - Stdnt_FA_Term_Geoloc

Part 2: Modify the Report

After identifying the result objects and the objects in conditions to be modified, follow steps 4 – 8 to modify your report. Geoloc and Residency should be modified if the data should NOT be linked to the individual’s FA term. If no result objects or objects in conditions are identified, no further action is required.
Part 2: Modify the Report (continued)

4. In the query panel, remove the result objects and objects in conditions, if applicable, selected from:
   - Stdnt_FA_Term_Residency_Off
   - Stdnt_FA_Term_Geoloc

5. Replace them with the identically-named result objects and objects in conditions from Geoloc and Residency Off folders under the Person Data folder.

6. Click the SQL button and confirm that the Residency and Geoloc result objects are being selected from the Residency_Off or Geoloc tables. You should no longer see the Stdnt_FA_Term prefix on these table names.

   ```sql
   SELECT
   M_FADW1.RESIDENCY_OFF, RESIDENCY,
   M_FADW1.GEOLOC, GEOLOC_STATE,
   M_FADW1.PERSONAL_DATA,EMPLID,
   M_FADW1.STDNT_TEST_ACT,ACT_COMP_SCORE
   FROM
   M_FADW1.RESIDENCY_OFF,
   M_FADW1.GEOLOC,
   M_FADW1.PERSONAL_DATA,
   M_FADW1.STDNT_TEST_ACT
   WHERE
   (M_FADW1.RESIDENCY_OFF,EMPLID) IN
   (SELECT EMPLID
   FROM M_FADW1.PERSONAL_DATA
   WHERE
   (Last Flow(Not Effective Term)='All Flow(No Effective Term)'),CONSTRANDED)
   AND ( (  
   ```
SA04 FinAid/StuFin Universe (continued)

Part 2: Modify the Report (continued)

6. The SQL shows the object in the condition is now selected from the Person Data folder.

```
M_RADW1.GEOLOC.EFFECTIVE_TERM =
    (select max(a.GEOLOC.EFFECTIVE_TERM)
from M_RADW1.GEOLOC a GEOLOC where
    a.GEOLOC.EMPLID=M_RADW1.GEOLOC.EMPLID and
    a.GEOLOC.EFFECTIVE_TERM is not NULL
    OR
    (M_RADW1.GEOLOC.EMPLID is NULL
    AND
    M_RADW1.STDTN.TEST_ACT.ACT_COMP_SCORE > 30
    AND
    M_RADW1.GEOLOC.GEOLOC_STATE = 'HI')
```

7. When you run your modified query, a new prompt displays for the new options. In the case of the sample query, there are new prompts for Geoloc Effective Term and Residency Off Effective Term options.

8. After rerunning the query, review and verify the query results.
Related Links

DocAnalyze creates a text file for a report with information, such as:

- objects
- conditions
- prompts used in the query
- classes
- SQL statements
- data providers
- variables used in the document

For more information about DocAnalyze, click the following link:
http://www.mais.umich.edu/reporting/tools.html

For a step-by-step procedure, see “Using DocAnalyze to Analyze BusinessObjects Reports” in MAIS LINC. To access this document:

1. Log into MAIS LINC <https://maislinc.umich.edu> with your uniqname and UMICH (Kerberos) password.
2. Type “docanalyze” in the Search box on the MAIS LINC Home page, and click Go.