Geoloc and Residency Changes in SA04 FinAid/StuFin Universe

Overview

Geoloc and Residency 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.

Recently, the University signed an agreement with BusinessObjects to upgrade our current software to a BusinessObjects Web-based version. In preparation for this future BusinessObjects upgrade, a change needs to be made to some BusinessObjects universes to handle how some effective dates and effective terms are selected. The change affects the SA04 FinAid/StuFin (Financial Aid/Student Financials) BusinessObjects universe.

This change eliminates the need for users to select an effective term option when reporting Geoloc or Residency data related to a financial aid term. New Geoloc and Residency folders have been created under the Financial Aid folder that will automatically link the appropriate term(s) of data from these tables with the financial aid term(s) that the query is reporting. Users who would like to report on all available Geoloc and Residency data for an individual, not related to an financial aid term, will still be able to do so, using the tables under the Person Data folder.

Details About Changes

- There are now Geoloc and Residency Off folders under both the Person Data folder and the Financial Aid folder.

- The new folders under Financial Aid have different names; each is preceded by “Stdnt FA Term,” which indicates it is a copy of the original table and is linked to the Stdnt_FA_Term table. The two folder names under the Personal Data folder and the Financial Aid folder are specified below:

  - When creating a new report, it is essential to select the data from the appropriate folder.
Details About Changes (continued)

The new and existing folders in BusinessObjects are shown below:

- When selecting Geoloc and/or Residency Off data from the Financial Aid folder, users will no longer see an effective term prompt. Geoloc and Residency_Off data will automatically be selected based on the related FA term for the individuals that are reported.
Details About Changes (continued)

- When selecting Geoloc and/or Residency Off data from the Person Data folder, users will see a new prompt. The Geoloc or Residency data displayed will NOT be linked to the person’s FA term. This prompt will ask a user to select between:
  - Last Row (the individual’s current term of data, or most future term, if there is one)
  - All Rows of data that exist for an individual

Report Changes

- **Reports in the BusinessObjects Corporate Documents Repository**
  There are no Financial Aid or Student Financials reports in the Corporate Documents repository that select Residency or Geoloc data.

- **Ad Hoc Queries and Customized Corporate Document Reports**
  - **Reporting on Data Related to FA Terms**: Users who report Geoloc and/or Residency Off data on customized reports related to the FA terms of individuals do not need to make any changes. When running existing reports after this universe change, the reports will automatically select data from the new Financial Aid folders, thus linking the Geoloc and/or Residency Off data to the individual’s FA term.
  
  - **Reporting on All Rows or Last Row**: Users who wish to report on Geoloc and/or Residency Off data, without regard to the individual’s FA term, will need to modify their existing reports. Users in this situation should refer to the following document for instructions on how to modify their reports, or contact the MAIS Help Desk for assistance at 734-936-7000 and select option 7, or email maishelpdesk@umich.edu.

Refer to the document, “Modifying Reports with Geoloc and Residency Data in BusinessObjects Universes,” which is available in the Reports section of the MAIS Web site on the Student Data Sets page at: [http://www.mais.umich.edu/reporting/studentdatasets.html](http://www.mais.umich.edu/reporting/studentdatasets.html).
Creating New Reports

When creating new ad hoc reports from the FinAid/StuFin universe, staff must remember to select Geoloc and Residency Off data from the Financial Aid folder if they wish to link that data to an FA term.

For reports that must list Geoloc and Residency Official data NOT linked to an FA term, staff must remember to select the appropriate data from the Person folder.

Updated Data Dictionaries

New table diagrams are available in the Financial Aid/Student Financials Data Dictionary, which can be downloaded from the MAIS Web site at: http://www.mais.umich.edu/reporting/studentdatasets.html