

# AGENDA

October 3, 2016 – October 4, 2016  
 9:00 a.m. – 5:00 p.m.  
 One Main Building, N602

**Purpose:**

UHD Implementation

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**Meeting called by:** \_\_\_\_\_

**Type of meeting:** Discovery Session

**Facilitator:** Marie Coleman

**Note taker:** Kimberly Monroe

**Timekeeper:** \_\_\_\_\_

**Attendees:** UHD Implementation Team

**Please read:** \_\_\_\_\_

**Please bring:** A copy of the session document

## AGENDA ITEMS

Topic	Presenter	Time allotted
✓ Reporting Module Overview	Marie Coleman	
✓ CB State Reporting Overview		
✓ State Reports Configured for Processing in Reporting Module		
✓ Stages of PS Custom CB Processing		
✓ CB Processes Naming Conventions		
✓ CB Reporting Process Definitions		
✓ CB Processing by Term/Period		
✓ Primary Extract (CB00)		
✓ CB01 Student Report		
✓ CB02 Texas Success Initiative Report		
✓ CB03 Course Inventory Report		
✓ CB04 Class Report		
✓ CB05 Building and Room Report		
✓ CB08 Faculty Report		
✓ CB09 Graduation Report		
✓ CB0B Admissions Report		
✓ CBE1 Student End of Semester Report		
✓ CB0S Student Schedule Report		
✓ CB11 Facilities Room Inventory Report		
✓ CB14 Facilities Building Inventory Report		
✓ HAZL Hazlewood Report		
✓ CB0N Student Number Change Report		
✓ Data Validation Module		

**OTHER INFORMATION**

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**Observers:**

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**Resources:**

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**Special notes:**

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**REPORTING DISCOVERY SESSION  
OCTOBER 3-4, 2016**

Last Name	First Name	Email Address	Phone Number	Job Title	Department



UNIVERSITY *of* HOUSTON SYSTEM

2016

*Discovery Session:*  
PS Oracle - Reporting

version: October 3, 2016

**Campus Solutions Services**

*Discovery Session Documentation: PS Oracle - Reporting*

1 | 200

# Table of Contents

(Content Below Is Hyperlinked Within the Guide)

<b>Reporting Module Overview.....</b>	<b>5</b>
Background.....	5
Integrations .....	6
<b>PS Custom CB State Reporting.....</b>	<b>7</b>
CB State Reporting Overview .....	7
State Reports Configured for Processing in Reporting Module .....	7
Stages of PS Custom CB Processing .....	8
CB Processes Naming Conventions.....	9
CB Reporting Process Definitions .....	9
CB Processing by Term/Period.....	12
Primary Extract (CB00) .....	14
Running the Primary Extract Process .....	14
Locking Certified Primary Extract Data.....	24
CB01 Student Report .....	25
Running the CB01 Load Process .....	25
Running Audit and Summary Reports.....	30
Running the Undergrad Cap Process .....	33
Generating the CB01 Flat File .....	36
Locking Certified CB01 Data .....	39
CB02 Texas Success Initiative Report.....	40
Running the CB02 Load Process .....	40
Running Audit and Summary Reports.....	45
Generating the CB02 Flat File .....	48
Locking Certified CB02 Data .....	52
CB03 Course Inventory Report .....	53
Running the CB03 Extract Process.....	53
Running the CB03 Load Process .....	57
Running Audit and Summary Reports.....	60
Generating the CB03 Flat File .....	63
Locking Certified CB03 Data .....	66
CB04 Class Report.....	67

Running the CB04 Load Process .....	67
Running Audit and Summary Reports .....	72
Generating the CB04 Flat File .....	75
Locking Certified CB04 Data .....	78
CB05 Building and Room Report.....	79
Running the CB05 Load Process .....	79
Running Audit and Summary Reports .....	83
Generating the CB05 Flat File .....	86
Locking Certified CB05 Data .....	90
CB08 Faculty Report .....	91
Running the CB08 Extract Process.....	91
Running the CB08 Load Process .....	97
Running Audit and Summary Reports .....	100
Generating the CB08 Flat File .....	102
Locking Certified CB08 Data .....	105
CB09 Graduation Report .....	106
Running the CB09 Extract Process.....	106
Running the CB09 Load Process .....	111
Running Audit and Summary Reports .....	114
Generating the CB09 Flat File .....	116
Locking Certified CB09 Data .....	119
CB0B Admissions Report.....	120
Running the CB0B Extract Process .....	120
Running the CB0B Load Process .....	125
Running Audit and Summary Reports .....	128
Generating the CB0B Flat File .....	130
Locking Certified CB0B Data .....	133
CBE1 Student End of Semester Report .....	134
Running the CBE1 Load Process.....	134
Running Audit and Summary Reports .....	138
Generating the CBE1 Flat File.....	140
Locking Certified CBE1 Data.....	143
CB0S Student Schedule Report .....	144
Running the CB0S Extract Process.....	144
Running the CB0S Load Process .....	148
Running Audit and Summary Reports .....	151

Generating the CB0S Flat File .....	153
Locking Certified CB0S Data .....	156
CB11 Facilities Room Inventory Report .....	157
Running the CB11 Extract Process .....	157
Running the CB11 Load Process .....	161
Running Audit and Summary Reports .....	164
Generating the CB11 Flat File .....	166
Locking Certified CB11 Data .....	169
CB14 Facilities Building Inventory Report .....	170
Running the CB14 Extract Process .....	170
Running the CB14 Load Process .....	174
Running Audit and Summary Reports .....	177
Generating the CB14 Flat File .....	179
Locking Certified CB14 Data .....	182
HAZL Hazlewood Report .....	183
Running the Hazlewood Extract Process .....	183
Running the Hazlewood Load Process .....	187
Running Audit and Summary Reports .....	190
Generating the Hazlewood Flat File .....	192
Locking Hazlewood Data .....	194
CB0N Student Number Change Report .....	195
Running the CB0N Load Process .....	195
Running the CB0N Flat File Process .....	196
<b>Data Validation Module .....</b>	<b>197</b>
Errors Notification .....	197
Reviewing and Cleaning Errors .....	198

# Reporting Module Overview

## Background

The Oracle PeopleSoft (PS) Reporting module is a custom built, bolt-on application suite that provides specific state reporting and internal reporting functionality to complement and integrate with delivered Oracle PS applications (Campus Solutions suite and HRMS suite). The Reporting module is housed in the Campus Solutions suite, and all Reporting derived data resides in the Campus Solutions database.

The custom PS Reporting module is comprised of three major functionality components:

- CB State Reporting
  - Academic
  - Facilities
- Data Validation
- Institutional Reporting

The following processes will be discussed for the Reporting Discovery Session:

- CB state reporting
  - How to extract academic, facilities, and faculty source data
  - How to stage academic, facilities, and faculty data
  - How to generate audit and summary data
  - How to correct staged/audited data
  - How to generate flat files for state submission
  - How to lock certified data
- Data validation reporting
  - How to run and retrieve data validation findings

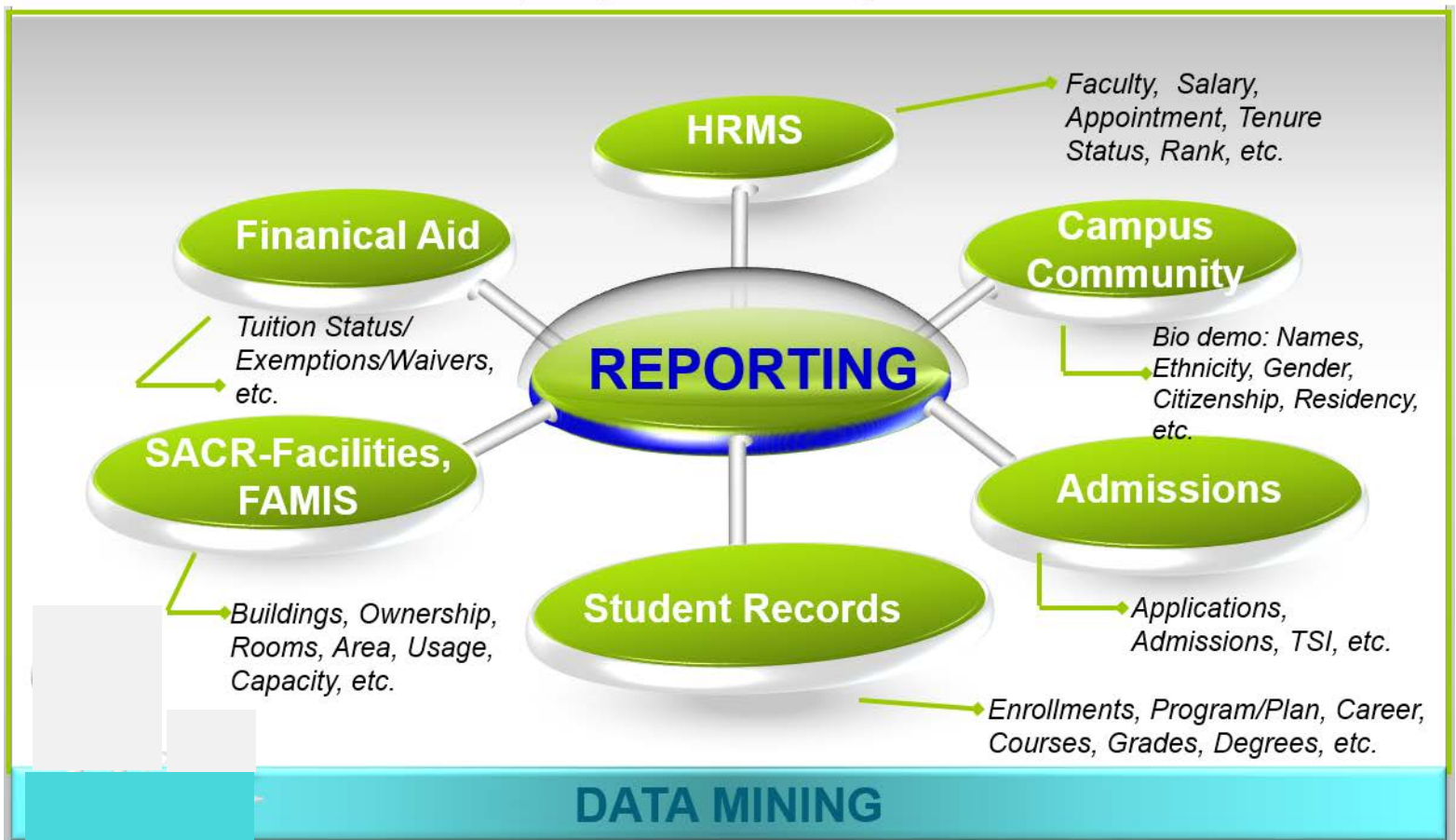


## Integrations

Custom PS Reporting for state reporting and data validation has integrations with:

- PS Campus Community
- PS Admissions
- PS Student Records
- PS HRMS
- PS Financial Aid

(example Data Elements)



# PS Custom CB State Reporting

## CB State Reporting Overview

The custom PS Reporting module provides state reporting features and data mining captures that facilitate the following business functions:

- Submission of state reports to the State of Texas such as those mandated by THECB (Texas Higher Education Coordinating Board) and LBB (Legislative Budget Board)
- Submission of federal mandated reports such as IPEDS (Integrated Postsecondary Education Data System) and DHHS (Department of Health and Human Services)
- Conducting Performance Assessments, Comparative Trend Analyses, Forecasting, and Strategic Planning
- Capturing and freezing ORD snapshots of operational data
- Completion of External Surveys and Publication of Performance Metrics such as university Fact Book, Enrollment and SCH, Average Class Size, Graduation Rates, Student Demographics, institutional online Resume for prospective students and legislators, Common Data Set, U.S. News, The Princeton Review
- Ad hoc Reporting

The key users of the Reporting module are those responsible for submitting CBM required reports to the state of Texas Coordinating Board and for those responsible for providing institutional reports.

## **State Reports Configured for Processing in Reporting Module**

The following are state required CB reports configured for processing in the custom PS Reporting module:

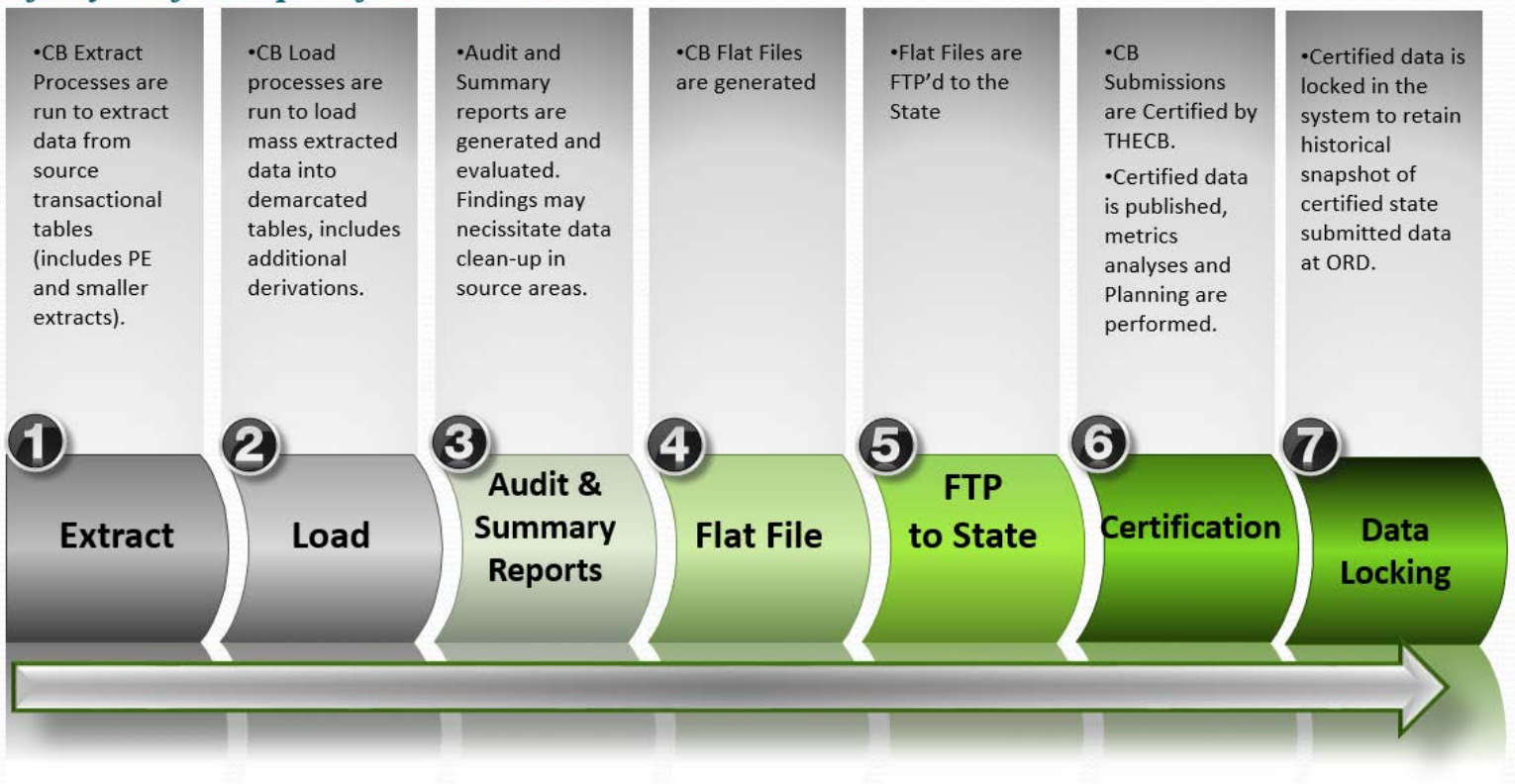
- CB01 Student Report
- CB02 Texas Success Initiative Report
- CB03 Course Inventory Report
- CB04 Class Report
- CB05 Building and Room Report (Room Utilization)
- CB08 Faculty Report
- CB09 Graduation Report
- CB11 Facilities Room Inventory Report
- CB14 Facilities Building Inventory Report
- CB0B Admissions Report
- CB0S Student Schedule Report
- CBE1 Student End of Semester Report
- CB0N Student Number Change Report
- HAZL Hazlewood Report
- Note: the CBE-Doctoral Exception Report and CBX-Students in Self-Supporting Courses and Programs Report are processed manually by each campus.

## Stages of PS Custom CB Processing

CB state reporting processing in PS involves seven key stages:

1. Extracting source data
2. Staging data - loading extracted source data and derived data
3. Audit and summary reports generation, undergrad cap processing, data corrections
4. Flat file generation
5. FTP state submission
6. Certification
7. Data locking

### Life Cycle of a PeopleSoft CB Submission



## CB Processes Naming Conventions

CB extract, load, audit, summary, and flat file processes follow a naming convention. This practice makes it easier for users to readily identify CB initiated processes from other running processes as well as identify which stage of the CB system processing life cycle was executed to run.

The naming convention is in the format: **UHC*B*{*Report Number*}{*Process*}.SQR**

- *{Report Number}* and Associated Definition
  - **00** Primary Extract
  - **01** Student Report
  - **02** Texas Success Initiative Report
  - **03** Course Inventory Report
  - **04** Class Report
  - **05** Building and Room Report (Room Utilization)
  - **08** Faculty Report
  - **09** Graduation Report
  - **11** Facilities Room Inventory Report
  - **14** Facilities Building Inventory Report
  - **0B** Admissions Report
  - **0S** Student Schedule Report
  - **E1** Student End of Semester Report
  - **0N** Student Number Change Report
  - **WV** Hazlewood Report
  
- *{Process}* and Associated Definition
  - **EX** Data Extract
  - **LD** Load
  - **AU** Data Audit Report
  - **SU** Summary Report
  - **FF** Flat File
  
- Examples:
  - UHC*B00EX*.SQR**
  - UHC*B01LD*.SQR**
  - UHC*B04AU*.SQR**
  - UHC*B0BFF*.SQR**

## CB Reporting Process Definitions

Tabled below is a reference list of all CB related processes within the custom Reporting module categorized by type of process executed, the technical name of the process as identified when monitoring the status of the process, the description label of the process, and general folder location of the process.

### *CB Extract Processes:*

<i>Process</i>	<i>Definition</i>	<i>Folder Location</i>
UHC <i>B00EX</i>	Enrollment & Class Extraction	Grouped in <i>Processes</i> folder
UHC <i>B03EX</i>	Extracts Course Catalog data	Grouped in <i>Processes</i> -Data Extraction folder
UHC <i>B0BEX</i>	Populate UHC <i>B</i> _ADMISSIONS & UHC	Grouped in <i>Processes</i> -Data Extraction folder
UHC <i>B08EX</i>	Populate UHC <i>B</i> _JOB & UHC <i>B</i> _PER_F	Grouped in <i>CB08</i> folder

UHCBO9EX	Populate UHCB_GRADUATION & UHC	Grouped in <i>CB09</i> folder
UHCBI1EX	Extract CB11 Room Reprting Data	Grouped in <i>CB11</i> folder
UHCBI4EX	Extract CB14 Bldg Reprting Data	Grouped in <i>CB14</i> folder
UHCBOSEX	Update UHCB_STDNT_ENRL Table	Grouped in <i>CB0S</i> folder
UHCBWVEX	CB Waiver Extract	Grouped in <i>CB Hazlewood Waiver</i> folder

***CB Load Processes:***

<b><i>Process</i></b>	<b><i>Definition</i></b>	<b><i>Folder Location</i></b>
UHCBO1LD	Load the UHCB_001 Table	Grouped in <i>Processes-Reporting Table Load</i> folder
UHCBO2LD	Load the UHCB_002 Table	Grouped in <i>Processes-Reporting Table Load</i> folder
UHCBO3LD	Load the UHCB_003 Table	Grouped in <i>Processes-Reporting Table Load</i> folder
UHCBO4LD	Load the UHCB_004 Table	Grouped in <i>Processes-Reporting Table Load</i> folder
UHCBOBLD	Load the UHCB_00B Table	Grouped in <i>Processes-Reporting Table Load</i> folder
UHCBO0LD	Load the UHCB_00N Table	Grouped in <i>Processes-Reporting Table Load</i> folder
UHCBE1LD	Load the UHCB_0E1 Table	Grouped in <i>CBE1</i> folder
UHCBO5LD	Load the UHCB_005 Table	Grouped in <i>CB05</i> folder
UHCBO8LD	Load the UHCB_008 Table	Grouped in <i>CB08</i> folder
UHCBO9LD	Load the UHCB_009 Table	Grouped in <i>CB09</i> folder
UHCBI1LD	Load the UHCB_011 Table	Grouped in <i>CB11</i> folder
UHCBI4LD	Load the UHCB_014 Table	Grouped in <i>CB14</i> folder
UHCBO5LD	Load the UHCB_00S Table	Grouped in <i>CB0S</i> folder
UHCBWVLD	CB Waiver Load	Grouped in <i>CB Hazlewood Waiver</i> folder

***CB Audit/Summary Report Processes:***

<b><i>Process</i></b>	<b><i>Definition</i></b>	<b><i>Folder Location</i></b>
UHCBO1AU	Generate CB001 Audit Reports	Grouped in <i>Processes-Audit Report Generation</i> folder
UHCBO2AU	Generate CB002 Audit Reports	Grouped in <i>Processes-Audit Report Generation</i> folder
UHCBO3AU	Generate CB003 Audit Reports	Grouped in <i>Processes-Audit Report Generation</i> folder
UHCBO3CA	Generate CB003 Catalog Audit	Grouped in <i>Processes-Audit Report Generation</i> folder
UHCBO4AU	Generate CB004 Audit Reports	Grouped in <i>Processes-Audit Report Generation</i> folder
UHCBOBAU	Generate CB00B Audit Reports	Grouped in <i>Processes-Audit Report Generation</i> folder
UHCBE1AU	Generate CB0E1 Audit Reports	Grouped in <i>CBE1</i> folder
UHCBO5AU	Generate CB005 Audit Reports	Grouped in <i>CB05</i> folder
UHCBO8AU	Generate CB008 Audit Reports	Grouped in <i>CB08</i> folder
UHCBO9AU	Generate CB009 Audit Reports	Grouped in <i>CB09</i> folder
UHCBI1AU	Generate CB011 Room Report	Grouped in <i>CB11</i> folder
UHCBI4AU	Generate CB014 Building Report	Grouped in <i>CB14</i> folder
UHCBO5AU	Generate CB00S Audit Reports	Grouped in <i>CB0S</i> folder
UHCBWVAU	CB Waiver Audit	Grouped in <i>CB Hazlewood Waiver</i> folder
UHCBO1SU	CB001 Summary Report	Grouped in <i>Processes-Summary Report Generation</i> folder
UHCBO4SU	CB004 Summary Report	Grouped in <i>Processes-Summary Report Generation</i> folder

***CB Flat File Processes:***

<b><i>Process</i></b>	<b><i>Definition</i></b>	<b><i>Folder Location</i></b>
UHCBO1FF	Generate CBM001 Flat File	Grouped in <i>Processes-Flat File Generation</i> folder
UHCBO2FF	Generate CBM002 Flat File	Grouped in <i>Processes-Flat File Generation</i> folder
UHCBO3FF	Creates CB Report 003	Grouped in <i>Processes-Flat File Generation</i> folder
UHCBO4FF	Generate CBM004 Flat File	Grouped in <i>Processes-Flat File Generation</i> folder
UHCBOBFF	Generate CBM00B Flat File	Grouped in <i>Processes-Flat File Generation</i> folder
UHCBO0FF	Generate CBM00N Flat File	Grouped in <i>Processes-Flat File Generation</i> folder
UHCBE1FF	Generate CBM0E1 Flat File	Grouped in <i>CBE1</i> folder
UHCBO5FF	Generate CBM005 Flat File	Grouped in <i>CB05</i> folder

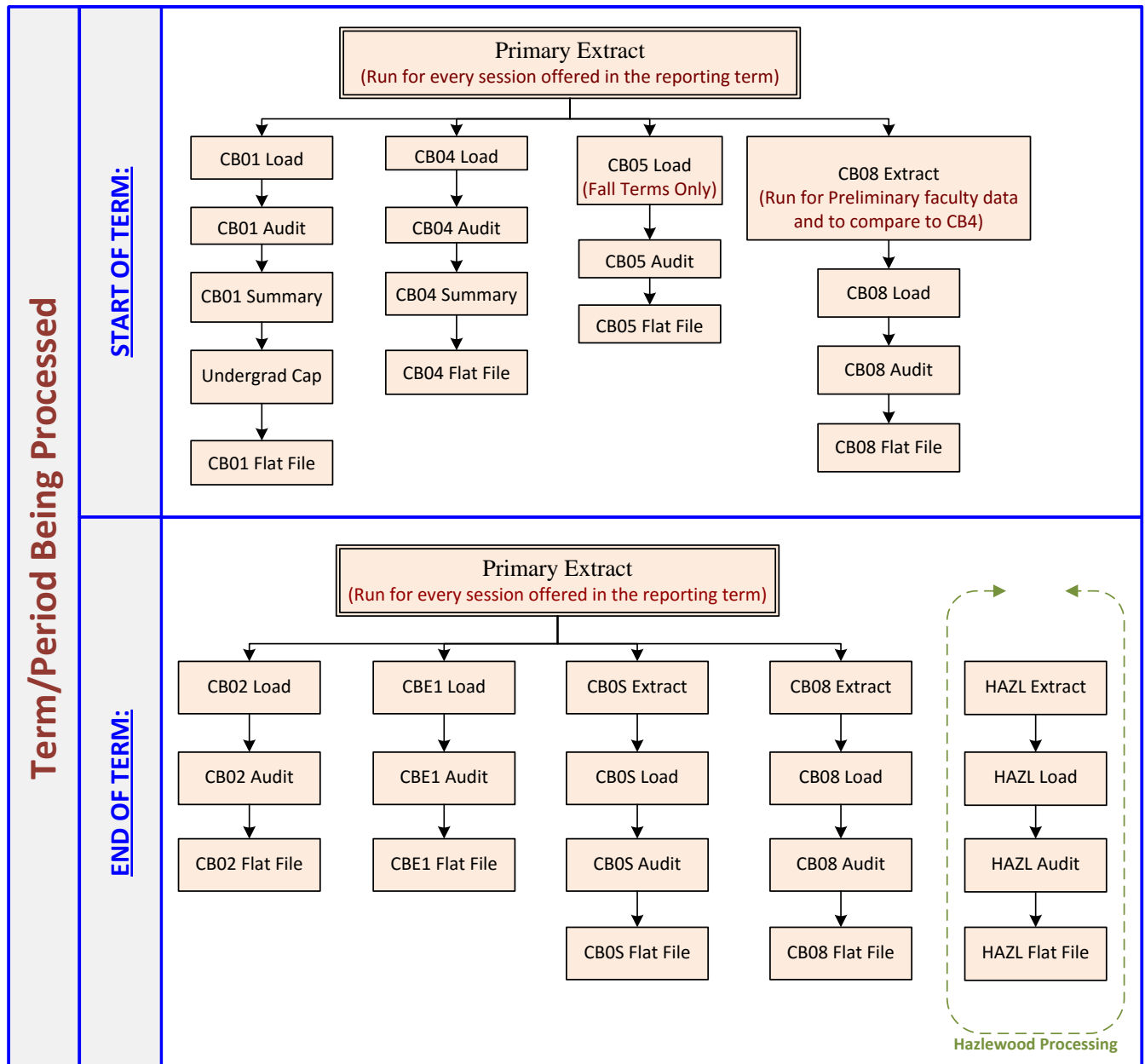
UHCBO8FF	Generate CBM008 Flat File	Grouped in <i>CB08</i> folder
UHCBO9FF	Generate CBM009 Flat File	Grouped in <i>CB09</i> folder
UHCBBRFF	Create Building/Room FTP File	Grouped in <i>CB11</i> folder
UHCBBRFF	Create Building/Room FTP File	Grouped in <i>CB14</i> folder
UHCBO5FF	UHCBO0S Data File	Grouped in <i>CB05</i> folder
UHCBWVFF	CB Waiver Flat File	Grouped in <i>CB Hazlewood Waiver</i> folder

***CB Other Process(es):***

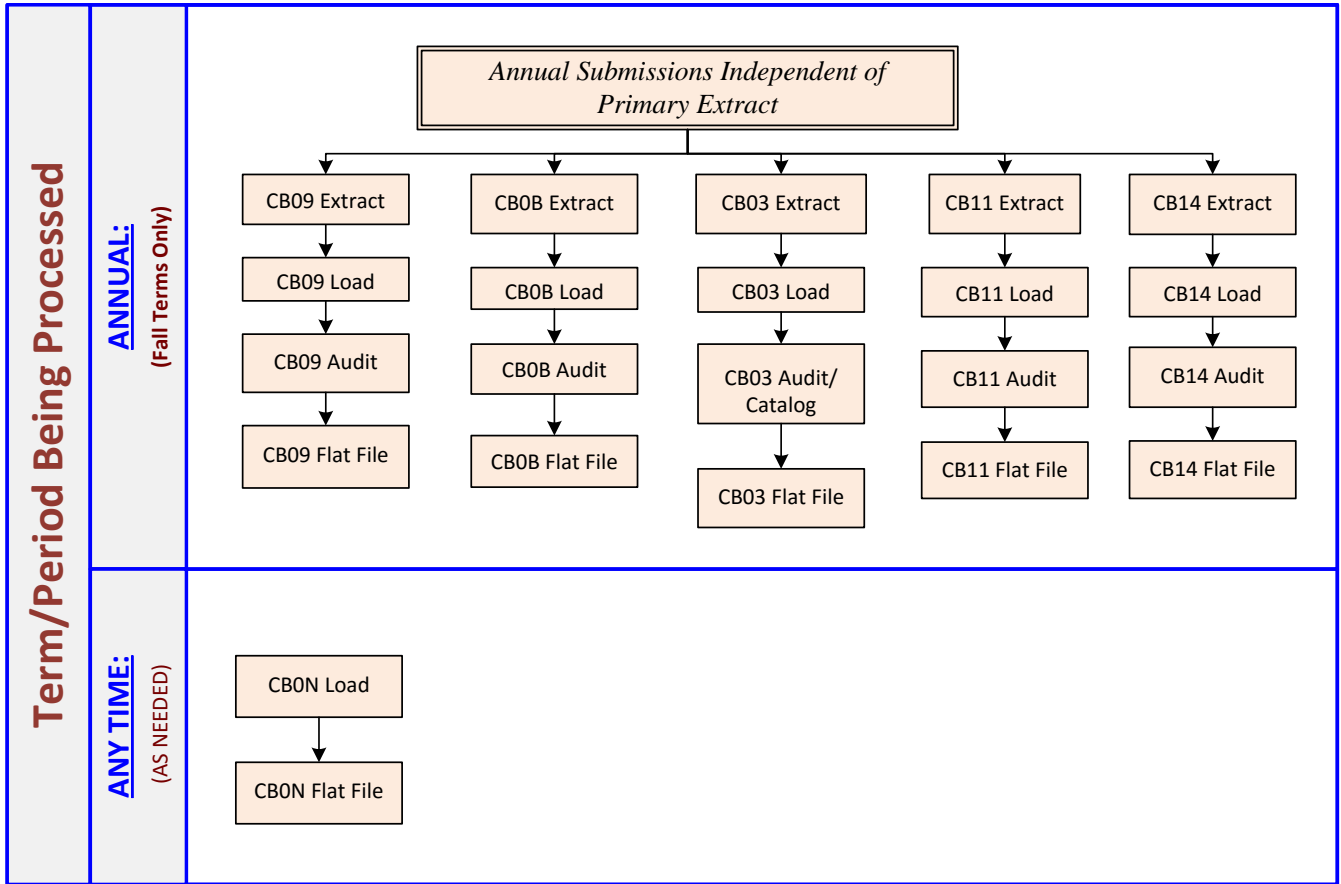
<b><i>Process</i></b>	<b><i>Definition</i></b>	<b><i>Folder Location</i></b>
UHCBUCAP	Store Undergrad Cap Groups	Grouped in <i>Processes</i> folder

## CB Processing by Term/Period

Generally, CB and Hazlewood reports are sequentially processed by term/period according to the below flowcharts:









## Primary Extract (CB00)

The CB Primary Extract (also referenced and recognized internally as “CB00” and “PE” in technical references and group discussions) is the extract process that mines data from a multitude of source/transactional (Admissions, Student Records, Campus Community, etc.) tables and stores specific data elements from those source tables into custom CB tables in preparation for and as a precursor to staging. It is the most immense and most lengthy of the CB processes. The program performs a wide range of heavy calculations and data derivations that translate and transform business area specific base data into state regulation appropriate data elements that are subsequently used to generate various CBM reports.

The Primary Extract process populates all of the “*CB foundational*” tables used by other more granular CB processes.

### Running the Primary Extract Process

- **Navigation:** [UHS Reporting > UHS CB Reporting > Processes > CB Primary Extract](#)
- **Run control ID:** reference discovery document “Introduction to Campus Solutions” pg. 43
- **Page elements:**

CB Extract Primary

Run Control ID: 00730PE
Report Manager    Process Monitor
Run

Reporting Extract: 000 - Primary PS/UHCB Extract

BEGINNING Term Processing
 END Term Processing

Institution:  University of Houston

Term:  Fall 2015

Census Session:

Extract Session(s):

Census Date:

Prior Term:  Summer 2015

Prior Session:

Prior Census Date:

Lock the Extract

Lock

Save
Notify

Add
Update/Display

<u>Field</u>	<u>Use</u>
<i>BEGINNING Term Processing</i>	Select this option when running the Primary Extract at the start of the term
<i>END Term Processing</i>	Select this option when running the Primary Extract at the end of the term
<i>Institution</i>	Users enter the institution that they are responsible for processing

<u>Field</u>	<u>Use</u>
<i>Term</i>	Enter the reporting term for the state submission being processed
<i>Prior Term</i>	Enter previous term as it relates to the reporting term being processed
<i>Census Session</i>	Enter the session being run for that term. The Primary Extract should be run for each session within that term
<i>Prior Session</i>	Enter the appropriate session within the prior term
<i>Extract Session(s)</i>	Extract Session(s) field is automatically populated based on the term, session, and census date being processed... <i>flexible entry logic is part of the derivation in determining the extract sessions</i>
<i>Census Date</i>	Census Date fields are automatically populated based on Term and Prior Term entered
<i>Prior Census Date</i>	Census Date fields are automatically populated based on Term and Prior Term entered

- Process Instance Outputs (View Log/Trace File):** CB processes run over the server generate log/trace files associated with that particular process instance. Valuable insights can be gained by reviewing the process instance outputs in verifying as well as troubleshooting what was run. Output in the trace files link provides a record of when the process was run, parameters used, and warning or procedure messages of possible errors in the data. Also key within this link is access to the CB Flat Files that are submitted to the State.

**View Log/Trace**

**Report**

Report ID 8197421      Process Instance 13935142      Message Log

Name UHCB00EX      Process Type SQR Report

Run Status Success

Enrollment & Class Extraction

**Distribution Details**

Distribution Node PSUNX      Expiration Date 10/30/2016

**File List**

Name	File Size (bytes)	Datetime Created
SQR_UHCB00EX_13935142.log	1,595	09/30/2016 1:47:47.192233PM CDT
uhcb00ex_13935142.PDF	31,062	09/30/2016 1:47:47.192233PM CDT
uhcb00ex_13935142.out	1,059,997	09/30/2016 1:47:47.192233PM CDT

**Distribute To**

Distribution ID Type      \*Distribution ID

User      UHSIRADM

Return

- Output File (\*.out):** Provides key information such as date/time the process instance was run, run control input parameters to determine the population to be included in the process, a summarization at the end of the output file for records processed, and a

date/time the process ended. *The summarizations at the end of the file are very useful to CB users in performing a quick gage as to whether the counts of records processed is reasonable or something appears amiss.*

```

Begin at: 30-SEP-16 13:29
Database: SA9SBX
UHCB00EX.SQR, modified 02/15/2013-1
Process Instance: 13935142
$gbl_calendar_year: 2016

Input Parameters
  Institution           = 00730
  Term                  = 1990
  Begin/End Term Processing = B
  Official Census Date  = 05/18/2016
  Session(s)           $gbl_session_codes_string = " and e.session_code in ('MIN')", used in dynamic SELECT
  Session(s) Delete    $gbl_delete_sessions_in   = " and session_code in ('MIN')", used in dynamic DELETE
  Session(s) Delete    $gbl_delete_sessions_not_in = " and session_code not in ('MIN')", used in dynamic DELETE
  Prior Term           = 1980
  Prior Term Census Date = 02/23/2016

&p.uhcb_classification: 6 $cb_classification: 6 &p.acad_prog: 030GR $acad_prog: 030GR &p.acad_plan: ADSUEDD $acad_p
$CB-record-found: Y $FTIC-flag: N
$in_emplid: 0007939
%Restrc Prg: 0007939 - " "

```

```

PS Enrollment Records Read      = 2246
CB Pers Student Records Inserted = 989
CB Student Enroll Records Inserted = 2246
CB Student History Records Inserted = 1328
CB Class Records Inserted      = 131
CB Class Instructor Records Inserted = 140

End at : 30-SEP-16 13:47

```

- **DAT (\*.DAT)/PDF (\*.PDF)/CSV (\*.csv) files:** These files provide specific views of data processed for internal review and state submission purposes. CB state submissions are generally provided through \*.DAT files; internal review files are generally provided through \*.PDF and \*.csv files.
- **Log File (\*.log):** Provides key metadata information on the process instance such as process name, run control id, output destination, directory, and program command information

```

PeopleTools 8 - PSSQR
Copyright (c) 1988, 2015, Oracle and/or its affiliates.
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Database Type:           Oracle
Database Name:          SA9SBX
Report Name:            UHCB00EX
Process Instance:       13935142
Run Control ID:         CBEX_MIN
Language Code:          ENG
Output Destination Type: WEB
Output Destination Format: PDF
Output Destination:     /logs/psftsa/sa9sbx/log_output/SQR_UHCB00EX_13935142
Output Directory (SQOT): /logs/psftsa/sa9sbx/log_output/SQR_UHCB00EX_13935142
Log Directory (SQLG):    /logs/psftsa/sa9sbx/log_output/SQR_UHCB00EX_13935142
SQR Flags:              -ZIF/apps/psftsa/sa9sbx/sqr/psqrENG.unx
Log File (SQLF):        /logs/psftsa/sa9sbx/log_output/SQR_UHCB00EX_13935142/uhcb00ex_13935142.out
Include File (SQIN):    /logs/psftsa/sa9sbx/log_output/SQR_UHCB00EX_13935142/,/apps/psftsa/sa9sbx/user/sqr/,/app
File (FILE_1):          /logs/psftsa/sa9sbx/log_output/SQR_UHCB00EX_13935142/uhcb00ex_13935142.PDF

SQR Command = /apps/psftsa/sa9sbx/bin/sqr/ORA/bin/sqr /apps/psftsa/sa9sbx/user/sqr/uhcb00ex.sqr /*@SA9SBX  "-o/logs.

```

**Key Background Notes on What the Process is Doing:**

- SQR Purpose: Assimilates and provides “foundational” base of CB data by which other subsequent CB processes reference in their granular processing.
- Populates custom tables UHCB\_CLASS\_TBL, UHCB\_STDNT\_ENRL, UHCB\_STDNT\_HIST, UHCB\_CLS\_INSTR, UHCB\_PERS\_STDNT

**Associated ‘Use’ (data) Pages:**

The data pages that are populated from running the Primary Extract process include the ‘Pers Student Extract Edit’, ‘Class Instructor Extract Edit’, ‘Enrollments Extract Edit’, ‘Student History Extract’, and ‘Class Data Extract’. These pages can be accessed for reviewing and editing per record item data.

- Use page ‘**Pers Student Extract Edit**’ (table UHCB\_PERS\_STDNT): Stores biographical data at the student id, institution and term level.

The bottom of the page includes audit reference information indicating the source(s) attached to updating the information on the page. Last Updated By logs the userid associated with the last update to the data record. Data updates via running the Primary Extract will show the process date/time the last process was run on the data. Data updates via manual user entry will show the manual date/time.

**Pers Student Data** Find | View All First 1 of 1 Last

Institution: 00730 University of Houston Term: 2000 Fall 2016  
Emplid: 0002186 Begin/End Term Processing: CBBAPPLCNT

Name: Xie Bin  
Ethnic Group: 1 Ethnic Origin: 1  
Date of Birth:   
National ID: High School ID:   
Gender: M  
Tuition Res.: RES  
Legal Res. (Current): 101 Orig Res.: 450  
Non Disclosure: Disclose

PS Hispanic/Latino: N

**PS Ethnic Group**

White	Black	Hispanic	Asian	Am.Indian/Alaskan	Unknown	Hawaii/Pacific
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

New CB Ethnic Origin 2  
(Hispanic Status):

**CB Race**

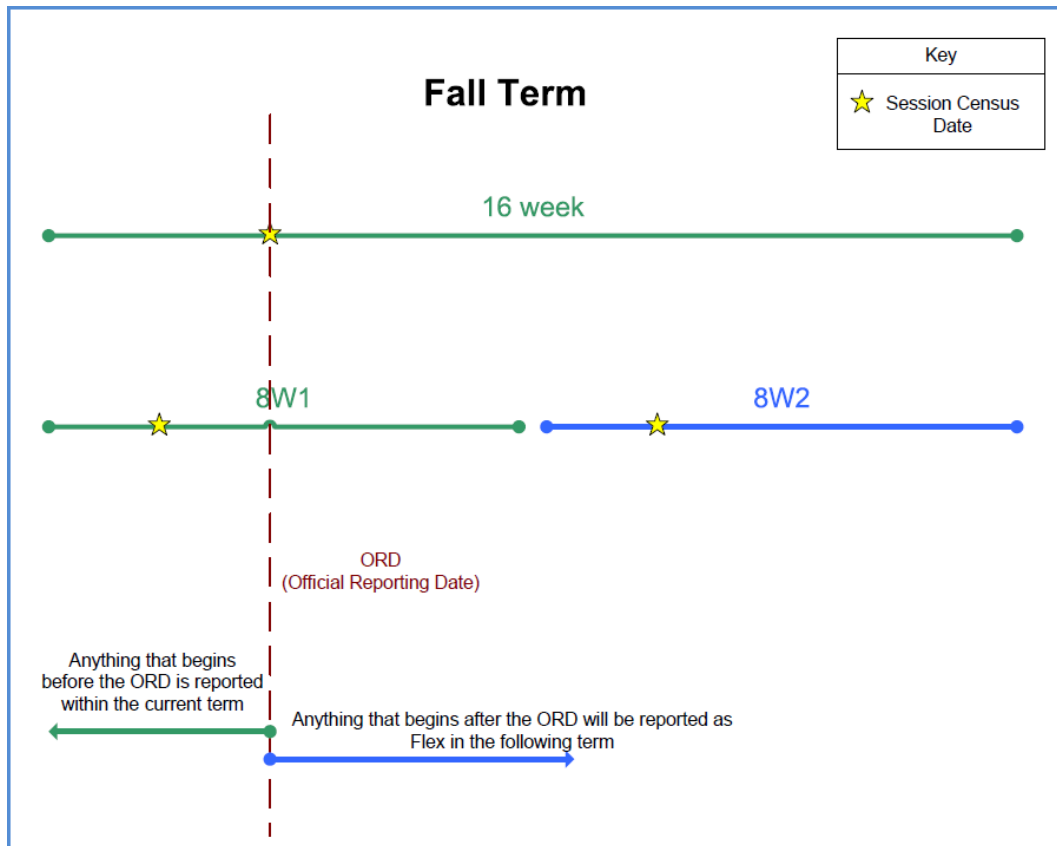
White	Black	Asian	Am. Indian/Alaskan	International	Unknown	Hawaiian/Pacific
<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

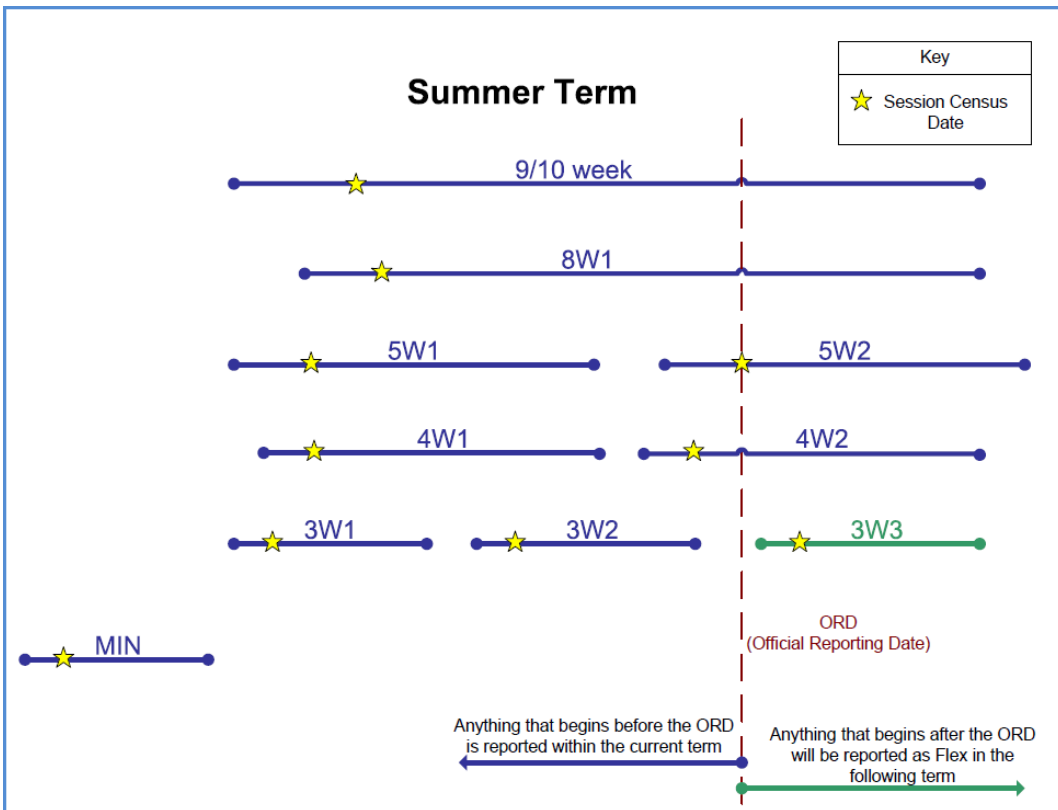
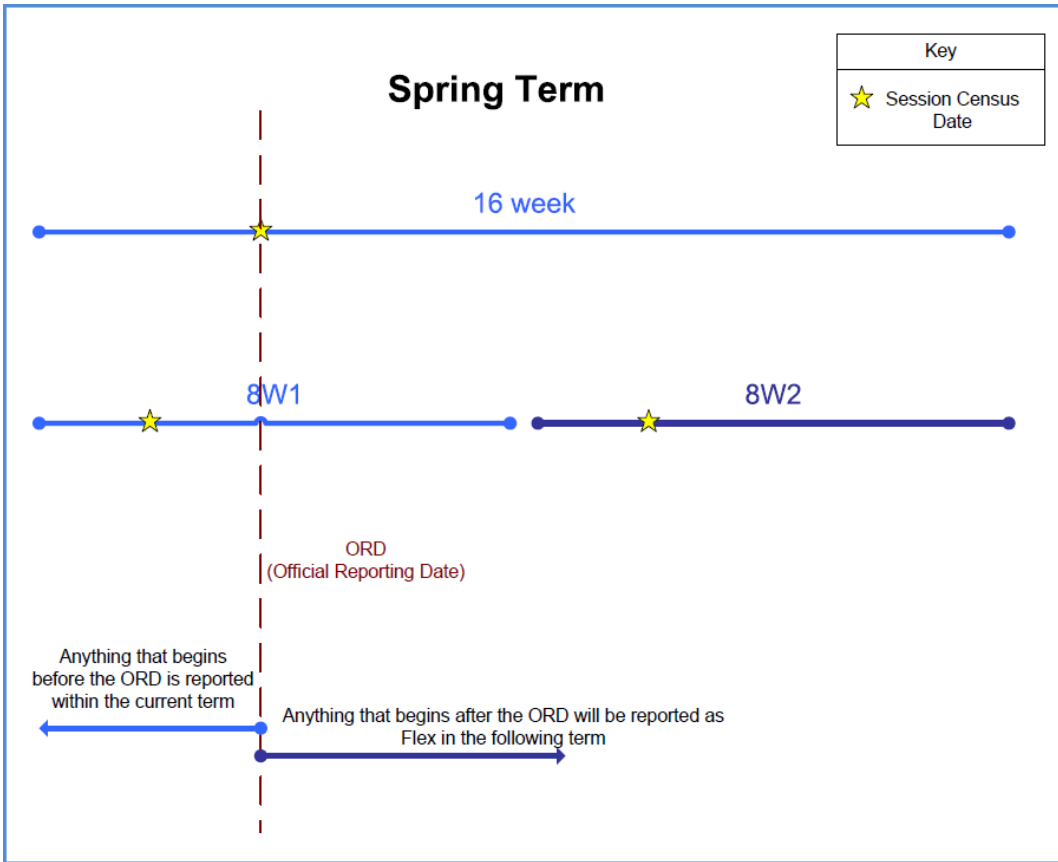
Process Date/Time: 09/07/2016 11:07:08AM  
Process Name: UHCB0BEX  
Manual Update Date/Time:  
Last Updated By: UHSIRADM

Save Return to Search Previous in List Next in List Notify Add Update/Display

**Additional Discovery Reference Information – Flexible Entry Processing:**

The custom CB program logic performs sophisticated derivations for identifying appropriate terms flex entry students should be populated in for state submission. Below is a basic, high-level illustration of how flex entry is generally processed.





## Locking Certified Primary Extract Data

After a report is certified by the State, CB users should always lock the reporting term to ensure the data cannot be overwritten. Mitigating the loss of this historical and officially reported information facilitates various downstream institutional analyses as well as state audit requests. Note, to unlock a term a request must be submitted and a script created by the development team to unlock the reporting term.

Locking the term entails the user clicking on the Lock button, then confirming the action. The action buttons on the page are then disabled for that term (disabling users from performing future actions on the locked term). An audit stamp of the userid performing the Lock along with a date/time is added in the Lock Extract field.

Locking the Primary Extract term:

- **Navigation:** UHS Reporting > UHS CB Reporting > Processes > CB Primary Extract
- **Run control ID:** reference discovery document “Introduction to Campus Solutions” pg. 43
- **Page elements:**

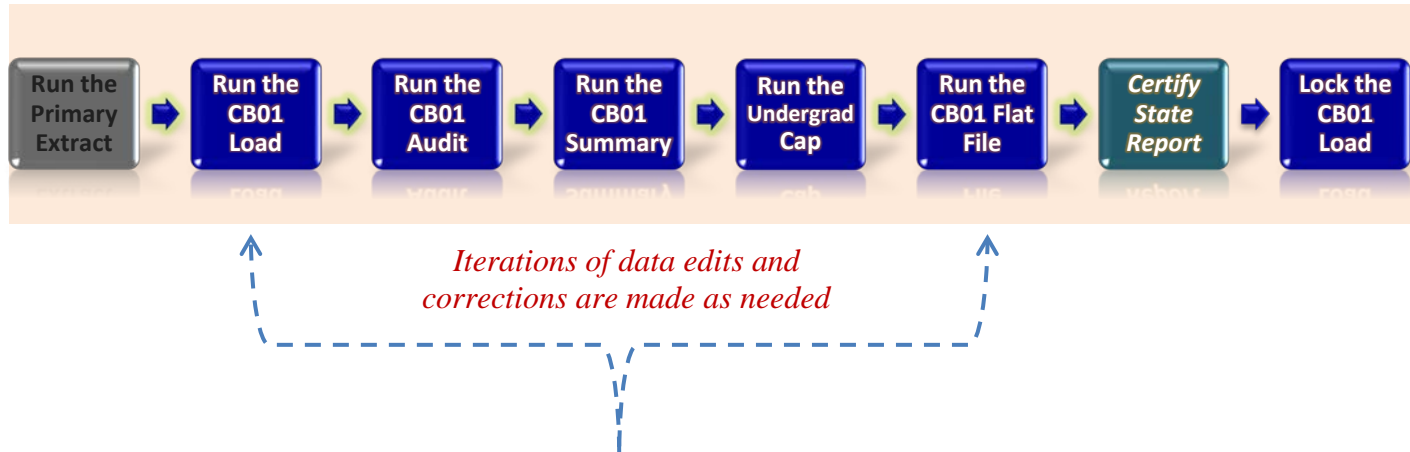
The screenshot shows the 'CB Extract Primary' form. At the top, it displays 'Run Control ID: 00730PE' and buttons for 'Report Manager', 'Process Monitor', and 'Run'. Below this is a 'Reporting Extract' field containing '000 - Primary PS/UHCB Extract'. The main section is titled 'BEGINNING Term Processing' and contains several input fields: 'Institution' (00730 University of Houston), 'Term' (1970 Fall 2015), 'Census Session' (1), 'Extract Session(s)', 'Census Date' (09/09/2015), and 'Prior Census Date' (06/04/2015). A 'Lock the Extract' section is visible, with a 'Lock' button highlighted by a red callout box that says 'Click on the "Lock" button to disable reprocessing of the term.' At the bottom, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

The screenshot shows the 'CB Extract Primary' form after the 'Lock' action. The 'Run' button is now disabled. The 'Reporting Extract' field remains '000 - Primary PS/UHCB Extract'. The main section now has two radio buttons: 'BEGINNING Term Processing' (selected) and 'END Term Processing'. The 'Institution' field is '00730 University of Houston', 'Term' is '1970 Fall 2015', 'Census Session' is '1', 'Extract Session(s)', 'Census Date' is '09/09/2015', and 'Prior Census Date' is '06/04/2015'. A new 'Prior Term' field is added with '1960 Summer 2015' and a 'Prior Session' field with '1'. The 'Lock the Extract' section now shows a 'Lock' button that is disabled and a text field containing '0897289 locked on 2016-10-01'. At the bottom, the 'Save' button is disabled, and 'Return to Search' and 'Notify' buttons are visible. The 'Add' and 'Update/Display' buttons are also present.

## CB01 Student Report

The CB01 Student Report reflects all students enrolled as of the official census date. Students who withdraw from a class on or before the official census date are not included in this report.

After the Primary Extract is run, the CB01 Load, Audit, Summary, Undergrad Cap and Flat File processes are run for the Student Report state submission. Iterations of data edits and corrections are made as needed to satisfy report certification by the state. After report certification is achieved the CB01 Load is locked in the system.



### Running the CB01 Load Process

CB load processes are run to load mass, broad ranging extracted data into demarcated more granular state report specific tables. A few additional derivations are applied in the load process.

- **Navigation:** [UHS Reporting > UHS CB Reporting > Processes > Reporting Table Load](#)
- **Run control ID:** reference discovery document “Introduction to Campus Solutions” pg. 43
- **Page elements:**

Report Table Load

Run Control ID: CBM01 Report Manager Process Monitor

Reporting Table Load: 001- Enrollments Data

Institution: 00730

Reporting Term: 1970

**Lock the Load**



<u>Field</u>	<u>Use</u>
<i>Reporting Table Load</i>	Select value '001-Enrollments Data'
<i>Institution</i>	Users enter the institution that they are responsible for processing
<i>Reporting Term</i>	Enter the reporting term for the state submission being processed

- Process Instance Outputs (View Log/Trace File):** CB processes run over the server generate log/trace files associated with that particular process instance. Valuable insights can be gained by reviewing the process instance outputs in verifying as well as troubleshooting what was run. Output in the trace files link provides a record of when the process was run, parameters used, and warning or procedure messages of possible errors in the data. Also key within this link is access to the CB Flat Files that are submitted to the State.

### View Log/Trace

**Report**

<b>Report ID</b>	8191578	<b>Process Instance</b>	13671991	<a href="#">Message Log</a>
<b>Name</b>	UHCB01LD	<b>Process Type</b>	SQR Report	
<b>Run Status</b>	Success			

Load the UHCB\_001 Table

**Distribution Details**

<b>Distribution Node</b>	PSUNX	<b>Expiration Date</b>	
--------------------------	-------	------------------------	--

**File List**

Name	File size (bytes)	Datetime Created
<a href="#">SQR_UHCB01LD_13671991.log</a>	1,519	09/28/2016 9:05:48.270211AM CDT
<a href="#">uhcb01ld_13671991.PDF</a>	4,428,268	09/28/2016 9:05:48.270211AM CDT
<a href="#">uhcb01ld_13671991.out</a>	2,082,511	09/28/2016 9:05:48.270211AM CDT

**Distribute To**

<b>Distribution ID Type</b>	*Distribution ID
<b>User</b>	UHSIRADM

Output Files

File List

Discovery Session Documentation: PS Oracle - Reporting

26 | 200

- **Output File (\*.out):** Provides key information such as date/time the process instance was run, run control input parameters to determine the population to be included in the process, a summarization at the end of the output file for records processed, and a date/time the process ended. *The summarizations at the end of the file are very useful to CB users in performing a quick gage as to whether the counts of records processed is reasonable or something appears amiss.*

```

Begin at: 28-SEP-16 08:29
Database: SAPRD

Process Instance: 13671991
SQR: UHCB01LD.SQR

Student Data Load

Input Parameters
  Institution      = 00730
  Term            = 2000
  Census Date     = 07-SEP-2016

$emplid: 0001465 - $enrollment_strm: 2000
$emplid: 0002733 - $enrollment_strm: 2000
$emplid: 0004568 - $enrollment_strm: 2000
  &hours: 3 &funding_code: 04
  #sum-hours: 3.000000
$emplid: 0005506 - $enrollment_strm: 2000
$emplid: 0007939 - $enrollment_strm: 2000
$emplid: 0009114 - $enrollment_strm: 2000
$emplid: 0009341 - $enrollment_strm: 2000
  &hours: 3 &funding_code: 01

```

```

$emplid: 8003012 - $enrollment_strm: 2000
$emplid: 8003120 - $enrollment_strm: 2000
  &hours: 3 &funding_code: 06
  #sum-hours: 3.000000
  &hours: 5 &funding_code: 06
  #sum-hours: 8.000000
  &hours: 1 &funding_code:
  #sum-hours: 1.000000
$emplid: 8003173 - $enrollment_strm: 2000
$emplid: 8003534 - $enrollment_strm: 2000
$emplid: 8004588 - $enrollment_strm: 2000
Records inserted into PS_UHCB_001 = 44353

End at   : 28-SEP-16 09:04

```

- **DAT (\*.DAT)/PDF (\*.PDF)/CSV (\*.csv) files:** These files provide specific views of data processed for internal review and state submission purposes. CB state submissions are generally provided through \*.DAT files; internal review files are generally provided through \*.PDF and \*.csv files.

The CB01 Load generates a \*.PDF file for user review of data loaded, it includes a summarization at the end of the report of record items loaded by the process.

```

Date: 28-SEP-2016 Student Reporting (UHCB 001) Table Load
Database: SAPRD Institution: 90790
Program: UHCB01LD.SQR Reporting Term: 2000
  
```

Emplid	National ID	Last First	MI	5	7	8	9	--10- a b	11	12	15	Major 18	20	21	22	23	24	25	26	31	33	27	35	36	37	38	39 a b c d e f g	IPEDS	
0001465		Hotagua Zainab		6	1	0	79		15	0	0	2	0	4407010009	0	0	0	0	0	0	0	0	0	0	0	2	2	5	BLACK
0002733		Filicec H		6	1	1	01		3	0	0	1	0	110030006	0	0	0	0	0	0	0	0	0	0	0	2	1	7	WHITE
0004568		Nihat Kohne		7	1	1	01		3	0	3	1	0	1303010004	0	0	0	0	0	0	0	0	0	0	0	2	1	7	WHITE
0005506		David May Jennifer	R	5	1	1	01		6	0	0	1	0	3001010102	0	0	0	0	0	0	0	1	0	0	0	2	1	7	WHITE
0007939		Collins Kimberly		6	1	1	01		3	3	0	2	0	1304010004	0	0	0	0	0	0	0	0	0	0	0	2	2	5	BLACK
0009111		Martin Glenn		6	1	020	000001		6	0	0	1	0	8202010016	0	0	0	0	0	0	0	0	0	0	0	2	1	7	WHITE
0009341		Heard Marsha	F	7	1	036	000001		0	9	3	2	0	1304010004	0	0	0	0	0	0	0	0	0	0	0	2	2	5	BLACK

```

Date: 28-SEP-2016 Student Reporting (UHCB 001) Table Load
Database: SAPRD Institution: 90790
Program: UHCB01LD.SQR Reporting Term: 2000
  
```

Emplid	National ID	Last First	MI	5	7	8	9	--10- a b	11	12	15	Major 18	20	21	22	23	24	25	26	31	33	27	35	36	37	38	39 a b c d e f g	IPEDS
Records read: 49777 Records inserted into UHCB_001: 44353																												

- **Log File (\*.log):** Provides key metadata information on the process instance such as process name, run control id, output destination, directory, and program command information

```

PeopleTools 8 - PSSQR
Copyright (c) 1988, 2015, Oracle and/or its affiliates.
All Rights Reserved

Database Type: Oracle
Database Name: SAPRD
Report Name: UHCB01LD
Process Instance: 13671991
Run Control ID: CB1TL
Language Code: ENG
Output Destination Type: WEB
Output Destination Format: PDF
Output Destination: /logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991
Output Directory (SQOF): /logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991
Log Directory (SQLG): /logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991
SQR Flags: -ZIF/apps/psftaa/saprd/sqr/psqrENG.unx
Log File (SQLF): /logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991/uhcb01ld_13671991.out
Include File (SQIN): /logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991/,,apps/psftaa/saprd/user/sqr/,,apps/psftaa/saprd/sqr/,,
File (FILE_1): /logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991/uhcb01ld_13671991.PDF

SQR Command = /apps/psftaa/saprd/bin/sqr/CRA/bin/sqr /apps/psftaa/saprd/user/sqr/uhcb01ld.sqr /*%SAPRD "-o/logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991/uhcb01ld_13671991.out" -xb -xi "-i/logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991/,,apps/psftaa/saprd/user/sqr/,,apps/psftaa/saprd/sqr/,, -zif/apps/psftaa/saprd/sqr/psqr.unx "-f/logs/psftaa/saprd/log_output/SQR_UHCB01LD_13671991/uhcb01ld_13671991.PDF" -PRINTER:PD SAPRD 13671991 UHSTRADM CB1TL
  
```

**Key Background Notes on What the Process is Doing:**

- SQR Purpose: Assimilates data from the custom CB extract tables and stages the data for more granular processing specifically for the CB01 state report.
- Populates custom table UHCB\_001; data submitted on the CB01 state report comes directly from this table.

**Associated 'Use' (data) Pages:**

The associated data page that is populated from running the CB01 Load process is the 'Students (001)' page. The page can be accessed for reviewing and editing per record item data.

- Use page '**Students (001)**' (table UHCB\_001): Stores state required CB01 file submission data layout at the student id, institution and term level.

The bottom of the page includes audit reference information indicating the source(s) attached to updating the information on the page. Last Updated By logs the userid associated with the last update to the data record. Data updates via running the CB01 Load will show the process date/time the last process was run on the data. Data updates via manual user entry will show the manual date/time.

Reporting Data 001

CBM001 Data Find | View All First 1 of 1 Last

Institution: 00730 University of Houston Term: 1830 Spring 2011  
FICE Code: 003652 CB Record Code: 1

Last: Ferries First: Alan Middle: J  
Career: UGRD Plan: ECONBS National ID: Empl ID: 0897808

4. Gender:	Male	18. Major (CIP):	45.0601.00 01	36. CEEB HS Code:	449999
5. Classification:	4	19. Funding Code:	00	37. PEIMS HS ID:	
6. Birthdate:		20. Tuition Exemption:		38. Ethnic Origin (Hispanic Status):	1
7. Tuition Status:	1	21. Coll Not Funded:	0.00	39a.White:	
8. Residency:	101	22. Develop Not Funded:	0.00	39b.Black/African American:	
9. Transfer Student:		23. Inter-Inst Not Funded:	0.00	39c.Asian:	
10a.On Campus:	9.00	24. Coll State Funded:	15.00	39d.American Indian/Alaska Native:	
10b.Off Campus:	6.00	25. Develop State Funded:	0.00	39e.International:	
11. Doctoral Hrs Funded:	0.00	26. Ugrd Degree Program:	120	39f. Unknown/Unreported:	7
12. Ethnic Origin:	3	27. Ugrd Fund Limit:	2	39g.Native Hawaiian/Pacific Islander:	
13. Semester:	2	31. Dual Credit:	0.00	IPEDS Ethnicity:	
14. Calendar Year:	2011	32. Restricted Prgm:			
15. Inter-Inst Funded:	0.00	33. Non-Degree:	0		
16. Flexible Entry:		34. Disclosure:	Disclose		
17. Remote Campus:		35. Grad SCH Senior:	0.00		

Process Name: UHCB01LD Process Date/Time: 03/12/11 12:58:12AM  
Last Updated User Name: UHSIRADM Manual Update Date/Time Stamp:

Save Return to Search Previous in List Next in List Notify

## Running Audit and Summary Reports

Audit and Summary reports are provided as part of the CB processing life cycle to facilitate users verifying data validity and troubleshooting data errors.

- **Navigation:** [UHS Reporting](#) > [UHS CB Reporting](#) > [Processes](#) > [Audit Report Generation](#) and [Summary Report Generation](#)
- **Run control ID:** reference discovery document “Introduction to Campus Solutions” pg. 43
- **Page elements:**

The screenshot displays the 'Uchcb Audit' interface. At the top left, there is a tab labeled 'Uchcb Audit'. Below it, the 'Run Control ID' is set to 'CB01'. To the right of this are links for 'Report Manager' and 'Process Monitor', and a prominent 'Run' button. A dropdown menu for 'Audit Report' is currently set to '001 - Enrollments Data'. Below this, there are two input fields: 'Institution' with the value '00765' and a search icon, and 'Reporting Term' with the value '1840' and a search icon. At the bottom of the form, there are five buttons: 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

<i><u>Field</u></i>	<i><u>Use</u></i>
<i>Audit Report</i>	Select value '001-Enrollments Data'
<i>Institution</i>	Users enter the institution that they are responsible for processing
<i>Reporting Term</i>	Enter the reporting term for the state submission being processed

- Process Instance Outputs (View Log/Trace File):** CB processes run over the server generate log/trace files associated with that particular process instance. Valuable insights can be gained by reviewing the process instance outputs in verifying as well as troubleshooting what was run. Output in the trace files link provides a record of when the process was run, parameters used, and warning or procedure messages of possible errors in the data. Also key within this link is access to the CB Flat Files that are submitted to the State.

**View Log/Trace**

**Report**

<b>Report ID</b>	8139238	<b>Process Instance</b>	13470137	<a href="#">Message Log</a>
<b>Name</b>	UHCB01AU	<b>Process Type</b>	SQR Report	

**Run Status** Success

Generate CB001 Audit Reports

**Distribution Details**

<b>Distribution Node</b>	PSUNX	<b>Expiration Date</b>	10/08/2016
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**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">SQR_UHCB01AU_13470137.log</a>	1,519	09/08/2016 9:39:42.384834AM CDT
<a href="#">uhcb01au_13470137.PDF</a>	154,197	09/08/2016 9:39:42.384834AM CDT
<a href="#">uhcb01au_13470137.out</a>	294	09/08/2016 9:39:42.384834AM CDT

**Distribute To**

Distribution ID Type	*Distribution ID
User	UHSIRADM

[Return](#)

- Output File (\*.out):** Provides key information such as date/time the process instance was run, run control input parameters to determine the population to be included in the process, a summarization at the end of the output file for records processed, and a date/time the process ended. *The summarizations at the end of the file are very useful to CB users in performing a quick gage as to whether the counts of records processed is reasonable or something appears amiss.*

```

Begin at: 08-SEP-16 09:38
Database: SAPRD

Process Instance: 13470137
SQR: UHCB01AU.SQR

Student Data Load (UHCB_001) Audit Report

Input Parameters
  Institution      = 00730
  Term            = 2000
  Report          = 001

Processing Table: ps_uhcb_001

End at   : 08-SEP-16 09:39
  
```

- **DAT (\*.DAT)/PDF (\*.PDF)/CSV (\*.csv) files:** These files provide specific views of data processed for internal review and state submission purposes. CB state submissions are generally provided through \*.DAT files; internal review files are generally provided through \*.PDF and \*.csv files.

The CB01 Audit Report process generates a \*.PDF file for user review of data loaded, it includes flags for “Questionable” and “Error Value” data, and summarizations at the end of the report.

```

Date: 01-SEP-2016                                AUDIT REPORT - CBM001 / Student Report                                Page: 80
Database: SAPRD                                  Institution: 00730 FICE: 003652
Program: UHCB01AU.SQR                             Reporting Term: 2000
                                                Reporting Record Code: 1
  
```

National Emplid	Birth Date	10a	13	Major CIP	Last First	31	32	33	34	35	36	37	38	39	
3	4 5 6	7 8 9	10a 11 12 14	15 16 17 18	19 20 21 22 23 24 25 26 27 28/29	31 32 33 34 35 36	37	-----39----- 38 a b c d e f g							
1201443	M 7 2 730	0 0 6	1 0 3	11010100 06	0 0 0 0 0 0 0 0 0 0	0	0	0	0	0	0	0	0	0	
QUESTIONABLE - #10a, sum of 10a + 10b is less than 1 or greater than 22 ERROR - #11, Doctoral SCH must be greater than 1 when #5, Classification="7"															
1201900	F 7 2 530	0 0 6	1 0 3	11010100 06	0 0 0 0 0 0 0 0 0 0	0	0	0	0	0	0	0	0	0	
QUESTIONABLE - #10a, sum of 10a + 10b is less than 1 or greater than 22 ERROR - #11, Doctoral SCH must be greater than 1 when #5, Classification="7"															
1201894	F 7 E 333	0 6 1	1 0 3	31050500 14	0 0 0 0 0 0 0 0 0 0	0	0	0	0	0	0	0	0		
QUESTIONABLE - #10a, sum of 10a + 10b is less than 1 or greater than 22															

```

Date: 09-SEP-2016                                AUDIT REPORT - CBM001 / Student Report                                Page: 80
Database: SAPRD                                  Institution: 00730 FICE: 003652
Program: UHCB01AU.SQR                             Reporting Term: 2000
                                                Reporting Record Code: 1
  
```

National Emplid	Birth Date	10a	13	Major CIP	Last First	31	32	33	34	35	36	37	38	39																																																																																																												
3	4 5 6	7 8 9	10a 11 12 14	15 16 17 18	19 20 21 22 23 24 25 26 27 28/29	31 32 33 34 35 36	37	-----39----- 38 a b c d e f g																																																																																																																		
<table border="1"> <thead> <tr> <th>Audit Summary</th> <th>Normal Range</th> <th>Questionable</th> <th>Error Values</th> </tr> </thead> <tbody> <tr><td>Item 1 Record Code</td><td>44346</td><td>0</td><td>0</td></tr> <tr><td>Item 2 Institution Code</td><td>44346</td><td>0</td><td>0</td></tr> <tr><td>Item 3 Student ID</td><td>44346</td><td>0</td><td>0</td></tr> <tr><td>Item 4 Gender</td><td>44345</td><td>0</td><td>1</td></tr> <tr><td>Item 5 Classification</td><td>44345</td><td>0</td><td>1</td></tr> <tr><td>Item 6 Date of Birth</td><td>44341</td><td>5</td><td>0</td></tr> <tr><td>Item 7 Tuition Status</td><td>44345</td><td>0</td><td>1</td></tr> <tr><td>Item 8 Residence</td><td>44342</td><td>0</td><td>4</td></tr> <tr><td>Item 9 Transfer/First Time</td><td>44343</td><td>0</td><td>3</td></tr> <tr><td>Item 10 SCH Load On/Off Campus</td><td>0</td><td>571</td><td>0</td></tr> <tr><td>Item 11 Doctoral SCH</td><td>44181</td><td>0</td><td>165</td></tr> <tr><td>Item 12 Ethnic Group</td><td>44177</td><td>0</td><td>169</td></tr> <tr><td>Item 13 Semester</td><td>44346</td><td>0</td><td>0</td></tr> <tr><td>Item 14 Year</td><td>44346</td><td>0</td><td>0</td></tr> <tr><td>Item 15 Inter-Institutional SCH</td><td>0</td><td>0</td><td>0</td></tr> <tr><td>Item 16 Flexible Entry</td><td>44346</td><td>0</td><td>0</td></tr> <tr><td>Item 17 Remote Campus</td><td>44346</td><td>0</td><td>0</td></tr> <tr><td>Item 18 Major CIP Code</td><td>44345</td><td>0</td><td>1</td></tr> <tr><td>Item 19 Doctoral Funding Code</td><td>0</td><td>0</td><td>0</td></tr> <tr><td>Item 20 Tuition Exemption</td><td>233</td><td>0</td><td>0</td></tr> <tr><td>Item 21 SCH Collegiate Not Funded - See #24</td><td></td><td></td><td></td></tr> <tr><td>Item 22 SCH Developmental Not Funded - See #24</td><td></td><td></td><td></td></tr> <tr><td>Item 23 SCH Inter-Institutional Not Funded - See #24</td><td></td><td></td><td></td></tr> <tr><td>Item 24 SCH Collegiate Funded</td><td>34698</td><td>33</td><td>0</td></tr> <tr><td>Item 25 SCH Developmental Not Funded - See #24</td><td></td><td></td><td></td></tr> <tr><td>Item 26 SCH UGRD Degree Hrs</td><td>21441</td><td>21</td><td>0</td></tr> </tbody> </table>															Audit Summary	Normal Range	Questionable	Error Values	Item 1 Record Code	44346	0	0	Item 2 Institution Code	44346	0	0	Item 3 Student ID	44346	0	0	Item 4 Gender	44345	0	1	Item 5 Classification	44345	0	1	Item 6 Date of Birth	44341	5	0	Item 7 Tuition Status	44345	0	1	Item 8 Residence	44342	0	4	Item 9 Transfer/First Time	44343	0	3	Item 10 SCH Load On/Off Campus	0	571	0	Item 11 Doctoral SCH	44181	0	165	Item 12 Ethnic Group	44177	0	169	Item 13 Semester	44346	0	0	Item 14 Year	44346	0	0	Item 15 Inter-Institutional SCH	0	0	0	Item 16 Flexible Entry	44346	0	0	Item 17 Remote Campus	44346	0	0	Item 18 Major CIP Code	44345	0	1	Item 19 Doctoral Funding Code	0	0	0	Item 20 Tuition Exemption	233	0	0	Item 21 SCH Collegiate Not Funded - See #24				Item 22 SCH Developmental Not Funded - See #24				Item 23 SCH Inter-Institutional Not Funded - See #24				Item 24 SCH Collegiate Funded	34698	33	0	Item 25 SCH Developmental Not Funded - See #24				Item 26 SCH UGRD Degree Hrs	21441	21	0
Audit Summary	Normal Range	Questionable	Error Values																																																																																																																							
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Item 4 Gender	44345	0	1																																																																																																																							
Item 5 Classification	44345	0	1																																																																																																																							
Item 6 Date of Birth	44341	5	0																																																																																																																							
Item 7 Tuition Status	44345	0	1																																																																																																																							
Item 8 Residence	44342	0	4																																																																																																																							
Item 9 Transfer/First Time	44343	0	3																																																																																																																							
Item 10 SCH Load On/Off Campus	0	571	0																																																																																																																							
Item 11 Doctoral SCH	44181	0	165																																																																																																																							
Item 12 Ethnic Group	44177	0	169																																																																																																																							
Item 13 Semester	44346	0	0																																																																																																																							
Item 14 Year	44346	0	0																																																																																																																							
Item 15 Inter-Institutional SCH	0	0	0																																																																																																																							
Item 16 Flexible Entry	44346	0	0																																																																																																																							
Item 17 Remote Campus	44346	0	0																																																																																																																							
Item 18 Major CIP Code	44345	0	1																																																																																																																							
Item 19 Doctoral Funding Code	0	0	0																																																																																																																							
Item 20 Tuition Exemption	233	0	0																																																																																																																							
Item 21 SCH Collegiate Not Funded - See #24																																																																																																																										
Item 22 SCH Developmental Not Funded - See #24																																																																																																																										
Item 23 SCH Inter-Institutional Not Funded - See #24																																																																																																																										
Item 24 SCH Collegiate Funded	34698	33	0																																																																																																																							
Item 25 SCH Developmental Not Funded - See #24																																																																																																																										
Item 26 SCH UGRD Degree Hrs	21441	21	0																																																																																																																							

- **Log File (\*.log):** Provides key metadata information on the process instance such as process name, run control id, output destination, directory, and program command information

```

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Database Type: Oracle
Database Name: SAPRD
Report Name: UHCB01AU
Process Instance: 13470137
Run Control ID: CBIAU
Language Code: ENG
Output Destination Type: WEB
Output Destination Format: PDF
Output Destination: /logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137
Output Directory (SQOT): /logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137
Log Directory (SQLG): /logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137
SQR Flags: -ZIF/apps/pfsta/saprd/sqr/psqrENG.unx
Log File (SQLF): /logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137/uhcb01au_13470137.out
Include File (SQIN): /logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137/,/apps/pfsta/saprd/user/sqr/,/apps/pfsta/saprd/sqr/,
File (FILE_1): /logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137/uhcb01au_13470137.FDF

SQR Command = /apps/pfsta/saprd/bin/sqr/ORA/bin/sqr /apps/pfsta/saprd/user/sqr/uhcb01au.sqr /*@SAPRD "-c/logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137/uhcb01au_13470137.out" -x1 "-i/logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137/,/apps/pfsta/saprd/user/sqr/,/apps/pfsta/saprd/sqr/" -zif/apps/pfsta/saprd/sqr/psqr.unx "-f/logs/pfsta/saprd/log_output/SQR_UHCB01AU_13470137/uhcb01au_13470137.FDF" -FRINTER:PD SAPRD 13470137 UHSIRADM CBIAU
  
```

## Running the Undergrad Cap Process

The custom CB processing life cycle includes functionality for uploading the state cross-reference list of students flagged as being impacted by the 45-hour and 30-hour fund limit rules.

The state cross-reference funding limit list identify those students who are approaching the funding limit (within 30 SCH of the limit), who will exceed the funding limit (after the semester reported), and who exceed the funding limit (prior to the semester reports). Item #27, Student Affected by Undergraduate Funding Limitation, will be used to determine the funding limit the student is affected by. The total number of undergraduate SCH the student has accumulated and Item #26, SCH of Undergraduate Degree Program, will be used to determine if the student will appear on any of the reports.

- **Navigation:** [UHS Reporting](#) > [UHS CB Reporting](#) > [Processes](#) > [Store Undergrad Cap Groups](#)
- **Run control ID:** reference discovery document “Introduction to Campus Solutions” pg. 43
- **Page elements:**

<u>Field</u>	<u>Use</u>
<i>Academic Institution</i>	Users enter the institution that they are responsible for processing
<i>Term</i>	Enter the reporting term for the state submission being processed
<i>File Path</i>	The file path is automatically populated based on the institution entered on the run control.  CB users save their state cross-reference funding limit file to campus folders on the PSUH1 drive (P drive).
<i>File Name</i>	Enter the name of the file that was saved on the PSUH1 drive that is to be uploaded.



- Process Instance Outputs (View Log/Trace File):** CB processes run over the server generate log/trace files associated with that particular process instance. Valuable insights can be gained by reviewing the process instance outputs in verifying as well as troubleshooting what was run. Output in the trace files link provides a record of when the process was run, parameters used, and warning or procedure messages of possible errors in the data. Also key within this link is access to the CB Flat Files that are submitted to the State.

### View Log/Trace

**Report**

<b>Report ID</b>	8148054	<b>Process Instance</b>	13483225	<a href="#">Message Log</a>
<b>Name</b>	UHCBCUCAP	<b>Process Type</b>	SQR Report	

**Run Status** Success

Store Undergrad Cap Groups

**Distribution Details**

<b>Distribution Node</b>	PSUNX	<b>Expiration Date</b>	2016
--------------------------	-------	------------------------	------

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">SQR_UHCBCUCAP_13483225.log</a>	1,847	09/12/2016 9:24:18.299786AM CDT
<a href="#">UHCBCUCAP_00759_2000_.CSV</a>	0	09/12/2016 9:24:18.299786AM CDT
<a href="#">UHCBCUCAP_13483225.PDF</a>	19,876	09/12/2016 9:24:18.299786AM CDT
<a href="#">UHCBCUCAP_13483225.out</a>	1,875	09/12/2016 9:24:18.299786AM CDT

**Distribute To**

Distribution ID Type	*Distribution ID
User	0122628

[Return](#)

- Output File (\*.out):** Provides key information such as date/time the process instance was run, run control input parameters to determine the population to be included in the process, a summarization at the end of the output file for records processed, and a date/time the process ended. *The summarizations at the end of the file are very useful to CB users in performing a quick gage as to whether the counts of records processed is reasonable or something appears amiss.*

```

Warning on line 417:
(SQR 4039) '$TYPE-62' assumed to be a variable name, not an expression.

Warning on line 420:
(SQR 4039) '$TYPE-56' assumed to be a variable name, not an expression.
PROGRAM START TIME - 12-SEP-2016 @ 09:24:04
DATABASE ATTACHED SAPRD
Program start time = 2016-09-12 09:24:04

INPUTPARAMETERS: 12-SEP-2016 @ 09:24:04
$OPRID 0122628
$RUN_CNTL_ID fund_limit
$INSTITUTION 00759
$STRM 2000
$FILEPATH1 \\PSUH1.uhs.uh.edu\PS_Prod\SAdata\UHC\CB\
$FILENAME UHCL_CBM001_Summer 2016_45&30HrList_Sept 2 2016 - 9-6-2016.TXT
00759 GL_INTERFACE 00797
$SETID 00797
$TYPE-62 62
$TYPE-56 56
$CURRENT-DATE 12-SEP-2016
$NOW-DATE 12-SEP-2016
Verifying group type headers
$FILE-IN \\PSUH1.uhs.uh.edu\PS_Prod\SAdata\UHC\CB\UHCL_CBM001_Summer 2016_45&30HrList_Sept 2 2016 - 9-6-2016.TXT
TYPE57
TYPE58
TYPE59
TYPE67
TYPE68
TYPE69
#TYPE-TOTAL 378
+++++Type code headers ok-found for R067 R068 R069 R057 R058 R059
Input file record count 477
2010 17-JAN-2017 13-MAY-2017
Next semester start date 17-JAN-2017
Group R062/R056 Effective date 16-JAN-2017
Loading THECB under grad cap Student Group records
  
```

- **DAT (\*.DAT)/PDF (\*.PDF)/CSV (\*.csv) files:** These files provide specific views of data processed for internal review and state submission purposes. CB state submissions are generally provided through \*.DAT files; internal review files are generally provided through \*.PDF and \*.csv files.

The Undergrad Cap process generates a \*.PDF file for user review of data updated by the process.

Report ID: UHCBUCAP.SQR		University of Houston System		Page No. 8
Institution: Univ. of Houston-Clear Lake		STORE UNDER GRAD CAP GROUPS		Run Date 09/12/2016
Database: SAPRD		Term 2000		Run Time 09:24:07
SSN	NAME	Message		
	PHILLIPS ,YANGTZE	69	07-NOV-2013	Active, ignore
	GARCIA ,MICHAEL	69	28-OCT-2015	Active, ignore
	VILLARREAL ,JENNIFER	69	19-APR-2016	Active, ignore
	WADE ,JESSICA	69	05-NOV-2014	Active, ignore
	CHAPMAN ,EMILY	69	19-APR-2016	Active, ignore
	GONZALEZ ,JORGE	69	19-APR-2016	Active, ignore
	DELMONICO ,JEFFREY	69	15-OCT-2012	Active, ignore
	TORIO-BALDERAS ,MARIA	69	09-APR-2015	Active, ignore
	SANCHEZ ,ENZO	69	28-OCT-2015	Active, ignore
	RANKIN ,SETH	69	28-OCT-2015	Active, ignore
	RAY ,SARA	69	28-OCT-2015	Active, ignore
	WILLIAMS ,JASHAINA	69	09-APR-2015	Active, ignore
	TRINH ,JACK	69	12-SEP-2016	Store new record and header
	TRINH ,JACK	69	16-JAN-2017	Store new R056 or R062 record and header
	STEVENSON ,CAROL	69	07-NOV-2013	Active, ignore
	FENN ,LAURA	69	24-SEP-2014	Active, ignore
	DUSTON ,JAMES	69	09-APR-2015	Active, ignore
	DOMINGUEZ ,CHARLES	69	19-APR-2016	Active, ignore
	KENDRICK ,CHARLES	69	07-NOV-2013	Active, ignore
	MEDFORD ,NICHOLAS	69	28-OCT-2015	Active, ignore
	CORBELL ,CASEY	69	19-APR-2016	Active, ignore
	CHOMENKO ,CHRIS	69	19-APR-2016	Active, ignore
Groups inserted	154			
Groups updated	0			
Term	2000			
File Input	\\PSU01.uhs.uh.edu\PS_Prod\SAdata\UHC\CB\UHCL_CBM001_Summer 2016_45430HrList_Sept 2 2016 - 9-6-2016.TXT			

- **Log File (\*.log):** Provides key metadata information on the process instance such as process name, run control id, output destination, directory, and program command information.

```

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Database Type: Oracle
Database Name: SAPRD
Report Name: UHCBUCAP
Process Instance: 13483225
Run Control ID: fund_limit
Language Code: ENG
Output Destination Type: WEB
Output Destination Format: PDF
Output Destination: C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225
Output Directory (SQOT): C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225
Log Directory (SQLG): C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225
SQR Flags: -ziff:\psappsv\saprd\SQR\PSSQR.ENG.INI
Log File (SQLF): C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225\UHCBUCAP_13483225.out
Include File (SQIN): C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225:\f:\psappsv\saprd\user\sqr:\f:\psappsv\saprd\user\sqr:\
File (FILE_1): C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225\UHCBUCAP_13483225.PDF

SQR Command = f:\psappsv\saprd\bin\sqr\ora\bin\sqrw f:\psappsv\saprd\user\sqr\UHCBUCAP.sqr /*@SAPRD "-o:C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225\UHCBUCAP_13483225.out" -xmb -xcb -xl "-i:C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225:\f:\psappsv\saprd\user\sqr:\f:\psappsv\saprd\user\sqr:" -ziff:\psappsv\saprd\SQR\PSSQR.INI "-i:C:\Users\PSProcschd\psft\pt\8.55\appserv\prcs\saprd\log_output\SQR_UHCBUCAP_13483225\UHCBUCAP_13483225.PDF" -PRINTER:PD SAPRD 13483225 0122628 fund_limit

```

**Key Background Notes on What the Process is Doing:**

- Running the Undergrad Cap process places the students referenced in the state list into Student Groups. Generally the Undergrad Cap process is run before registration begins for the following term; for Summer terms, campuses generally wait until fall registration has concluded since fall and summer registration times overlap.
- Currently campuses running the Undergrad Cap process place students in the below student group categories:
  - R056 UG charge for hrs>30 hr rule
  - R057 UG w/in 30 hrs of the 30+ hour
  - R058 UG > 30+ hr rule after term
  - R059 Exceeded 30 hour rule UG
  - R062 Ugrd 45 Hr Cap: Chg Additional
  - R067 Ugrd 45 Hr Cap: Within 30 SCH
  - R068 Ugrd 45 Hr Cap:Exceed Next Sem
  - R069 Ugrd 45 Hr Cap: In Excess

**Generating the CB01 Flat File**

Flat Files are generated as part of the CB processing life cycle. These flat files are saved by users to their departmental file directories and then FTP'd to THECB secure server.

- **Navigation:** [UHS Reporting > UHS CB Reporting > Processes > Flat File Generation](#)
- **Run control ID:** reference discovery document “Introduction to Campus Solutions” pg. 43
- **Page elements:**

<i><u>Field</u></i>	<i><u>Use</u></i>
<i>State Report to Create</i>	Select value '001-Enrollments Data'
<i>Institution</i>	Users enter the institution that they are responsible for processing
<i>Reporting Term</i>	Enter the reporting term for the state submission being processed

- Process Instance Outputs (View Log/Trace File):** CB processes run over the server generate log/trace files associated with that particular process instance. Valuable insights can be gained by reviewing the process instance outputs in verifying as well as troubleshooting what was run. Output in the trace files link provides a record of when the process was run, parameters used, and warning or procedure messages of possible errors in the data. Also key within this link is access to the CB Flat Files that are submitted to the State.

### View Log/Trace

**Report**

<b>Report ID</b>	8191944	<b>Process Instance</b>	13674947	<a href="#">Message Log</a>
<b>Name</b>	UHCB01FF	<b>Process Type</b>	SQR Report	
<b>Run Status</b>	Success			

Generate CBM001 Flat File

**Distribution Details**

<b>Distribution Node</b>	PSUNX	<b>Expiration</b>	10/28/2016
--------------------------	-------	-------------------	------------

**File List**

Name	File Size (bytes)	Datetime Created
SQR_UHCB01FF_13674947.log	1,519	09/28/2016 10:13:39.401631AM CDT
UH_001_00730_2000_13674947.DAT	7,311,288	09/28/2016 10:13:39.401631AM CDT
uhcb01ff_13674947.PDF	4,802,581	09/28/2016 10:13:39.401631AM CDT
uhcb01ff_13674947.out	515	09/28/2016 10:13:39.401631AM CDT

**Distribute To**

<b>Distribution ID Type</b>	*Distribution ID
User	UHSIRADM

[Return](#)

- Output File (\*.out):** Provides key information such as date/time the process instance was run, run control input parameters to determine the population to be included in the process, a summarization at the end of the output file for records processed, and a date/time the process ended. *The summarizations at the end of the file are very useful to CB users in performing a quick gage as to whether the counts of records processed is reasonable or something appears amiss.*

```

Begin at: 28-SEP-16 10:13
Database: SAPRD

Process Instance: 13674947

CBM001/Student Report

Input Parameters
  Institution      = 00730
  Term            = 2000
  Output File Name =

$$sqr-platform = UNIX
$platform = UNIX

unx cmd: echo $$QOT > output_path_13674947
path: /logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947/
Adjusted file name: UH_001_00730_2000_13674947.DAT
File Path: /logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947/UH_001_00730_2000_13674947.DAT

End at : 28-SEP-16 10:13
  
```

- **DAT (\*.DAT)/PDF (\*.PDF)/CSV (\*.csv) files:** These files provide specific views of data processed for internal review and state submission purposes. CB state submissions are generally provided through \*.DAT files; internal review files are generally provided through \*.PDF and \*.csv files.

The CB01 Flat File process parses data according to the specific layout required by the state and generates the submission as the \*.DAT file. CB users save the \*.DAT file to their departmental file directories and then FTP the file to THECB secure server.

The CB01 Flat File process also generates a \*.PDF file for user review of data generated in the flat file state submission, it is a formatted version of the \*.DAT file.

HY2R003652CBM01120160120Moreno,Susan E semoreno@uh.edu	030000000300120160000	00000000000000000000000000Gildert	Gary	R0000	000000000000	
	12000000000000120160000	00000000000000000000000000Hernandez Olmos	Luis Alber	0000	000000000000	3
	0800040000000120160000	04000000000000000000001202Ewetuya	Daniel	00000	000000449999	3
	0600030000000120160000	000000000000000000000001201Feng	Yuanfang	0000	000000449999	3
	090000000900120160000	000000000000000000000000Alfataierge	Ezzedeen O	0000	020000000000	3

- **Log File (\*.log):** Provides key metadata information on the process instance such as process name, run control id, output destination, directory, and program command information.

```

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Database Type:         Oracle
Database Name:        SAPRD
Report Name:          UHCB01FF
Process Instance:     13674947
Run Control ID:       CB1FF
Language Code:        ENG
Output Destination Type:  WEB
Output Destination Format: PDF
Output Destination:   /logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947
Output Directory (SQOT): /logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947
Log Directory (SQLG):  /logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947
SQR Flags:            -zif/apps/psftsa/saprd/sqr/psqrENG.unx
Log File (SQLF):      /logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947/uhcb01ff_13674947.out
Include File (SQLIN): /logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947/,/apps/psftsa/saprd/user/sqr/,/apps/psftsa/saprd/sqr/,
File (FILE_1):        /logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947/uhcb01ff_13674947.PDF

SQR Command = /apps/psftsa/saprd/bin/sqr/ORA/bin/sqr /apps/psftsa/saprd/user/sqr/uhcb01ff.sqr /*@SAPRD "-o/logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947/uhcb01ff_13674947.out" -xb -xi "-l/logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947/,/apps/psftsa/saprd/user/sqr/,/apps/psftsa/saprd/sqr/", "-zif/apps/psftsa/saprd/sqr/psqr.unx" "-f/logs/psftsa/saprd/log_output/SQR_UHCB01FF_13674947/uhcb01ff_13674947.PDF" -PRINTER:PD SAPRD 13674947 UHSIRADM CB1FF

```

## Locking Certified CB01 Data

After a report is certified by the State, CB users should always lock the reporting term to ensure the data cannot be overwritten. Mitigating the loss of this historical and officially reported information facilitates various downstream institutional analyses as well as state audit requests. Note, to unlock a term a request must be submitted and a script created by the development team to unlock the reporting term.

Locking the term entails the user clicking on the Lock button, then confirming the action. The action buttons on the page are then disabled for that term (disabling users from performing future actions on the locked term). An audit stamp of the userid performing the Lock along with a date/time is added in the Lock Extract field.

Locking the CB01 term:

- **Navigation:** [UHS Reporting](#) > [UHS CB Reporting](#) > [Processes](#) > [Reporting Table Load](#)
- **Run control ID:** reference discovery document “Introduction to Campus Solutions” pg. 43
- **Page elements:**

The screenshot displays the 'Report Table Load' interface. At the top, it shows 'Run Control ID: CBM01' and navigation links for 'Report Manager', 'Process Monitor', and a 'Run' button. Below this, the 'Reporting Table Load' is set to '001- Enrollments Data'. There are input fields for 'Institution:' (00730), 'Reporting Term:' (1970), and 'Census Date:' (09/09/2015). A section titled 'Lock the Load' contains a 'Lock' button and a message: '0897289 locked on 2016-10-02'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. A red callout box with a white background and red border points to the 'Lock' button, containing the text: 'Click on the "Lock" button to disable reprocessing of the term.'

## CB02 Texas Success Initiative Report

The CB02 report includes end-of-semester information on all undergraduate students attempting credit hours as required for Texas Success Initiative (TSI) purposes, including transfer students who are registered for one or more Coordinating Board approved courses during the reporting period. CBM002 includes students in credit certificate programs, but excludes students in continuing education programs. The report does not include students who withdraw prior to or on the official census date.

The CB02 Load, Audit, and Flat File processes are run for the TSI state submission. Iterations of data edits and corrections are made as needed to satisfy report certification by the state. After report certification is achieved the CB02 Load is locked in the system.



### Running the CB02 Load Process

CB load processes are run to load mass, broad ranging extracted data into demarcated more granular state report specific tables. A few additional derivations are applied in the load process.

- **Navigation:** [UHS Reporting](#) > [UHS CB Reporting](#) > [Processes](#) > [Reporting Table Load](#)
- **Run control ID:** reference discovery document “Introduction to Campus Solutions” pg. 43
- **Page elements:**

Report Table Load

Run Control ID: CB02 Report Manager Process Monitor

Reporting Table Load: 002 - TASP

Institution: 00765

Reporting Term: 1840

**Lock the Load**



# Data Validation Module

The Data Validation module in PeopleSoft is a custom application that was created with the goal of facilitating proactive correction of data anomalies to ensure the reporting of accurate and reliable data. In addition to the critical benefit of proactively capturing data integrity issues, another key benefit provided by this functionality is providing transparency to management of the data anomalies within their business areas.

The functionality generates audit reports of data identified as needing review and/or correction that are emailed to business owners and other parties of interest. Users receiving the reports are expected to correct the identified errors within the 'Clean-up Cycle Commitment' time.

## Errors Notification

Users identified as recipients will receive an email notification containing a summary report in pdf format identifying the number of errors captured by each audit. Included in the email is a hyperlink to the page in PeopleSoft for viewing and resolving the errors.

- To view the summarization counts of errors by each audit click on the pdf attachment in the email notification. To navigate to the page in PeopleSoft to begin reviewing and resolving the errors click on the hyperlink at the end of the email notification (if you are not already logged into PeopleSoft you will be prompted to log in).

Figure 1: Sample Email Notification

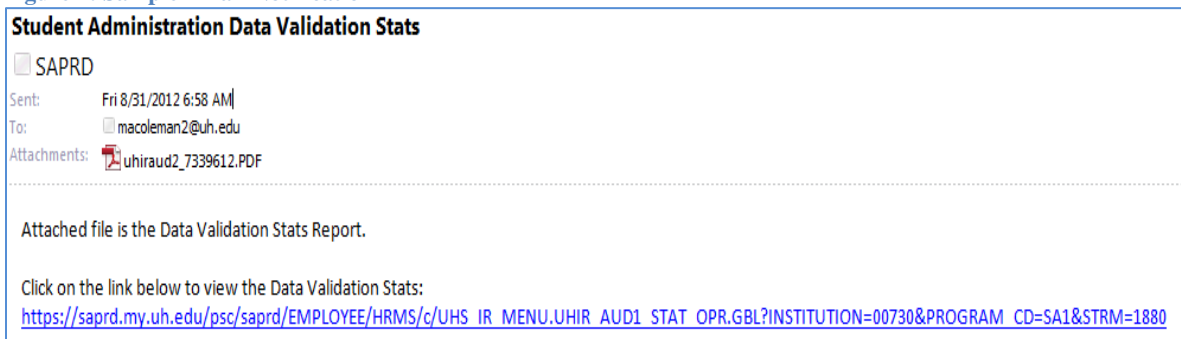


Figure 2: Sample Summary Report (uhiraud2\_7339612.pdf)

Program	Data Audit Procedure	Errors	Overrides	Last Updated
SA1	UHM_UGRD_RESIDENCY_ERRORS	583	0	08/31/2012
SA1	UHM_UGRD_DISC_APPL	26	0	07/18/2012
SA1	UHM_UGRD_MULTIPLEAPPS	2	0	07/20/2012

Additional report details:

Date: 31-AUG-2012  
Program: UHIRAUD2.SQR  
Data User: Coleman, Marie A  
Module: SA

Student Administration Data Validation Stats  
Institution: 00730  
Term: 1880



## Reviewing and Cleaning Errors

Clicking on the hyperlink in the email notification will direct you to the **User Audit Stats** page (navigation: [Main Menu](#) → [UHS Data Validation](#) → [Use](#) → [User Audit Stats](#)). Summarized on the page will be statistics for each audit you have security access to, audits you have not been granted access to will not be displayed on the page.

Statistics per institution and term included on the page are: a count of errors identified for each audit, a count of overrides identified for each audit, and the last date the validation process ran for each audit. Also included on the page are command buttons **'Clean up Data'** (for reviewing itemized errors and resolving them) and **'Run Audit'** (for initiating an on-demand/ad-hoc data validation run control process).

Figure 3: User Audit Stats Page

The screenshot shows the 'User Audit Stats' page with the following details:

- Program Code: SA1
- Institution: 00730
- Term: 1910

Audit	Errors	Overrides	Last Updated	Clean up Data	Run Audit
1 Discontinued Applicants - Undergrad	1	24	01/02/2014	<input type="button" value="Clean up Data"/>	<input type="button" value="Run Audit"/>
2 Duplicate Applications - Undergrad	0	0	01/07/2014	<input type="button" value="Clean up Data"/>	<input type="button" value="Run Audit"/>
3 Residency - Newly Admitted Undergrads	46	0	01/03/2014	<input type="button" value="Clean up Data"/>	<input type="button" value="Run Audit"/>

- To see the detailed list of specific errors for an audit (and begin work on clearing them), click on the **'Clean up Data'** command button for that audit row. You will be directed to the Audit Override page.

Figure 4: Audit Override Page

The screenshot shows the 'Audit Override' page with the following details:

- Program: SA1
- Institution: 00730
- Term: 1910
- Audit: Residency - Newly Admitted Undergrads

Buttons:

Override	Emplid	Name	Effective Term	Residency	County	State	Country	Citizenship
1	0818320	Viveros, Lady Stephanie	1900	INT			COL	COL
2	0956607	Valdez, Mariana	1910	INT			MEX	MEX
3	0962310	Karovalia, Aamish Mehaboob	1910	INT			IND	IND
4	1025571	Jivani, Aaqib Anwar	1910	INT			IND	IND
5	1026691	Nguyen, Minh Tam Thi	1910	INT			VNM	VNM
6	1044563	Gonzalez, Olivia	1910	INT			MEX	MEX
7	1061814	Hernandez, Brenda A	1910	INT			USA	MEX
8	1071337	Kamiti, Rose N	1910	INT			KEN	KEN
9	1071756	Rodriguez, Oscar	1910	INT			COL	COL
		Cercia Costellano David						

- Click on the ‘**Clean up Instruction**’ command button to view and confirm information about the audit and what steps you should take to resolve the errors. It is important to review the instructions for guidance on correctly resolving the error. Click on the ‘**Return**’ command button when finished reading the instructions.

Figure 5: Sample Audit Instruction

<b>Audit Instruction</b>
<p>This data validation identifies undergraduate students and newly enrolled students who enroll at UH with residency errors in state of residence, county of residence, country of residence, residency determination, and/or whose admit term is different than the residency effective term.</p> <p>Cleanup Instructions: There are residency data errors for this student. Review Apply Texas Application data to determine the correct county, state and country of residency.</p> <p>If the student is deemed a Resident on Residency Official 1: Texas should be populated as the state of Residency on Residency Official 2, the county of residency should be completed in Residency Official 2 and the country of residency should be USA.</p> <p>If the student is deemed as Not Texas Resident on Residency Official 1, a state other than Texas should be populated as the state of residency on Residency Official 2. For Not Texas Residents, the county should not be populated. The country of residency should be USA.</p> <p>If the student is deemed as International on Residency Official 2, only the country of residency should be populated in Residency Official 2. In the Application Maintenance page, Biographical Details tab, click on the Citizenship link in the bottom right corner. Make sure that citizenship information is populated for the country of residency.</p> <p>If uncertainties exist for residency determination, make the student a Not Texas Resident. Because students can appeal residency determination, it is best to err on the side of caution.</p>

- For each itemized error in the page, perform the applicable action(s) to correct the error. If it is determined that the error should be overridden, click on the Override checkbox for that item. **Note: each error item identified should be reviewed and analyzed, an item checked as overridden should still have been analyzed prior to checking the override.** Items checked as being overridden remain in the historical tracking for management review.
- After completing working the list of errors, you can either wait for the next scheduled automated run of the audit or initiate an on-demand run of the audit to get an updated list of errors. Errors that have been cleaned will no longer show on the work list. To run the audit on-demand, click on the ‘**Run Audit Process**’ command button. You will be directed to Process Scheduler where you can monitor the process run for completion. After the process completes, navigate back to the **User Audit Stats** page to view the updated errors list.

## **Contact Information**

Marie Coleman: [macolem3@central.uh.edu](mailto:macolem3@central.uh.edu) ; (713) 743-9762

