

ODS Functional Training Financial Aid Training Workbook

February 2007

Release 3.1



SUNGARD HIGHER EDUCATION

What can we help you achieve?

This documentation is proprietary information of SunGard Higher Education and is not to be copied, reproduced, lent or disposed of, nor used for any purpose other than that for which it is specifically provided without the written permission of SunGard Higher Education.

SunGard Higher Education

4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website

<http://connect.sungardhe.com>

Distribution Services e-mail address

distserv@sungardhe.com

Other services

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

Trademark

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.

Notice of rights

Copyright © SunGard Higher Education 2007. This document is proprietary and confidential information of SunGard Higher Education Inc. and is not to be copied, reproduced, lent, displayed or distributed, nor used for any purpose other than that for which it is specifically provided without the express written permission of SunGard Higher Education Inc.



Table of Contents

Section A: Financial Aid Metadata	4
Overview	4
Section B: Oracle Basic Terms and Concepts	9
Overview	9
Section C: Common Business Concepts Diagrams	12
Reporting and Slotted Views.....	12
Address Views and their Purpose.....	16
Section D: Common Display Rules.....	19
Overview	19
Section E: Financial Aid Business Concept Diagrams	20
Financial Aid Application Diagram	20
Financial Aid Award and Disbursement Diagram	21
Financial Aid Fund.....	22
Section F: Financial Aid Display Rules.....	23
Overview	23
Section G: Financial Aid Awards Self Service Reporting Templates	24
Overview	24
Section H: Exercise	27
Run Financial Aid Sample Reports	27
Section I: Appendix	29
55 Reporting and Slotted Common Views.....	29



Section A: Financial Aid Metadata

Lesson: Overview

◀ [Jump to TOC](#)

Workbook goal

The goal of this workbook is to provide you the knowledge and practice to run Financial Aid ODS reports.

Workbook objectives

Upon completion of this course, you will be able to:

- define common database and table functionality
- explain the concept, data, frequency and data sources involved in reporting views
- identify primary keys used with specific Financial Aid Entity Relationship Diagrams
- list reporting and slotted views
- describe Financial Aid report templates, including template parameters.

Intended audience

- Department Functional/Technical Staff - Internal designated report writers
- Department Managers, IT Department Support Staff - responsible for report writing



Section A: Financial Aid Metadata

Lesson: Overview (Continued)

◀ Jump to TOC

Description

Financial Aid metadata is information describing the data in tables. Metadata consists of information such as the source and targets of data.

Financial Aid Metadata Reports

The Financial Aid metadata reports to choose from are shown below.

Financial Aid Reporting View Meta Data Reports

Target Reports:

<u>Reporting View</u>	<u>Description</u>	<u>Key & Frequency</u>	<u>Recommended Search Columns</u>
APPLICANT_NEED	Contains detail data for the financial aid applicant's need information by aid year. Details will potentially include data loaded with calculations for total family contributions, gross need, cost of education and unmet need based on either a federal method or an institution method.	One row per person per aid year.	AID_YEAR, PERSON_UID PERSON_UID
AWARD_BY_FUND	Contains total amount of aid awarded by financial aid fund within an aid year. Detail data may include the aid year, academic period, financial aid fund, fund source, fund type, fund detail code, and federal financial aid fund identification code.	One row per aid year per fund.	AID_YEAR, FUND FUND, AID_YEAR
AWARD_BY_PERSON	Contains detail data for each person who was made an offer of a financial aid fund award within the aid year. Details may includes person, academic period, financial aid fund, fund source, fund type, fund detail code, award status, disbursement finalize indicator and award amount information.	One row per person per aid year and per fund.	AID_YEAR, PERSON_UID, FUND, ACADEMIC_PERIOD PERSON_UID, FUND, ACADEMIC_PERIOD ACADEMIC_PERIOD AID_YEAR, FUND FUND



Section A: Financial Aid Metadata

Lesson: Overview (Continued)

◀ Jump to TOC

Financial Aid Metadata Reports, continued

AWARD_DISBURSEMENT	Contains data regarding the award disbursements scheduled or posted for a person by financial aid fund and academic period. Details will include academic period, disbursement ID, disbursed date, scheduled date, disbursed amount, scheduled amount, disbursed percentage and disbursement load.	One row per person per aid year per disbursement ID or transaction number.	PERSON_UID, AID_YEAR, FUND, ACADEMIC_PERIOD
FINAID_APPLICANT_STATUS	Contains data for the aid year and the person who has applied for financial aid for the aid year. Details may include application locked indicator, budget group, administrative group, packaging group, tracking group, financial aid application status data, and budget type.	One row per aid year and person.	AID_YEAR, PERSON_UID PERSON_UID
FINAID_BUDGET_COMPONENT	Contains the budget component details for the person for the budget group assigned for the aid year. Details may include budget type, budget component amount, total budget.	One row per aid year per budget type per budget component per budget group per person.	AID_YEAR, PERSON_UID, BUDGET_TYPE, BUDGET_COMPONENT PERSON_UID
FINAID_BUDGET_COMP_SLOT	Uses data from the FINAID_BUDGET_COMPONENT reporting view. Displays up to 5 sets of values based on the defined display rule(s) with an internal group of BUDGET COMPS and a delivered or institution defined internal code. Delivered internal codes of FAPLECOMP may be used independently by the institution.	One row per person per aid year per profile code per component rule.	PERSON_UID, AID_YEAR, BUDGET_TYPE, PROFILE_CODE, COMPONENT_RI ACTIVITY_DATE
FINAID_ENROLLMENT	Contains details regarding the person's enrollment information by aid year and academic period that is used as the data for why an award had a financial aid disbursements. Data may include total anticipated credits, total actual credits, total billing credits, total freeze credits, total earned credits and total adjusted credits.	One row per aid year per academic period per person.	PERSON_UID, ACADEMIC_PERIOD
FINAID_FUND	Contains data regarding a financial aid fund for an aid year. Details may include fund source, fund type, fund detail code, federal financial aid fund identification, need based indicator, budget allocated amount, transfer amount, prior balance, total allocated amount, original offered amounts, accepted amount, declined amount, canceled amount, authorized amount and memoed amount.	One row per aid year per fund.	AID_YEAR, FUND FUND
FINAID_TRACKING_REQUIREMENT	Contains detail data on the tracking requirements for a financial aid applicant for the aid year. Data may include requirement, satisfied indicator, status, waived reason disbursement requirement indicators and memo indicator, etc.	One row per aid year per person per requirement.	PERSON_UID, AID_YEAR, REQUIREMENT, FUND



Section A: Financial Aid Metadata

Lesson: Overview (Continued)

◀ Jump to TOC

Financial Aid Metadata Reports, continued

GOVERNMENT_FA_FUND	<p>indicator, etc.</p> <p>Contains a set of common data identified for known governmental reporting regarding a financial aid fund. Detail data includes aid year, financial aid source type, financial aid type with reporting group for external or internal.</p>	One row per aid year per academic period per financial aid source type per financial aid type per fund.	AID_YEAR, FUND FUND, AID_YEAR AID_YEAR, FUND, ACADEMIC_PERIOD
GOVERNMENT_FINANCIAL_AID	<p>Contains common data identified for known governmental reporting regarding financial aid students. Detail data may include academic period, student level, financial aid fund title or name, fund source type, financial aid type, offered amount, accepted amount, declined amount, paid amount, disbursed amount, etc.</p>	One row per aid year per academic period per fund per person.	AID_YEAR, PERSON_UID, FUND, ACADEMIC_PERIOD PERSON_UID, FUND, ACADEMIC_PERIOD ACADEMIC_PERIOD AID_YEAR, FUND FUND PERSON_UID, ACADEMIC_PERIOD PERSON_UID, COHORT_RULE PERSON_UID, AID_YEAR, FUND, ACADEMIC_PERIOD PERSON_UID, STUDENT_LEVEL, ACADEMIC_PERIOD STUDENT_LEVEL, ACADEMIC_PERIOD ACADEMIC_PERIOD, STUDENT_LEVEL
LOAN_APPLICATION	<p>Contains data from a loan application submitted by a person for an aid year. Detail data may include loan application number, citizen indicator, alien registration number, driver's license number, addresses, phone numbers, and detailed loan data for various loans.</p>	One row per aid year per loan application number.	PERSON_UID, AID_YEAR, FUND
NEED_ANALYSIS	<p>Contains data usually loaded from a federally supplied electronic media. Detail data will include all data collected regarding student need for the aid year and student. Data may include parental contribution, student contribution, interface tape code, application number, state/province of residence, and other need based data for doing needs analysis either using a federal or institution method of calculation.</p>	One row per aid year per person per interface tape code per application number.	AID_YEAR, PERSON_UID, INTERFACE_TAPE_CODE, APPLICATION_NUMBER AID_YEAR, PERSON_UID, CURRENT_RECORD_IND PERSON_UID
SATISFACTORY_ACAD_PROGRESS	<p>Contains data on the student's satisfactory academic progress for the aid year as defined by a federal standard for calculation.</p>	One row per person per aid year per academic period.	PERSON_UID, ACADEMIC_PERIOD
TRACKING_REQUIREMENT_SLOT	<p>Uses data from the FINAID_TRACKING_REQUIREMENT reporting view. Displays up to 3 sets of values based on the defined display rule(s) with an internal group of TRACKING_REQS and a delivered or institution defined internal code. Delivered internal codes of FAPLTREQ may be used independently by the institution.</p>	One row per person per aid year per profile code per requirement rule.	PERSON_UID, AID_YEAR, PROFILE_CODE, REQUIREMENT_RULE ACTIVITY_DATE
USER_DEFINED_FIELDS	<p>Contains the data from the financial aid user-defined fields that may be populated by aid year for the person.</p>	One row per aid year per person.	AID_YEAR, PERSON_UID PERSON_UID



Section A: Financial Aid Metadata

Lesson: Overview (Continued)

◀ Jump to TOC

Metadata Report

Upon clicking one of the Financial Aid metadata reports, that report will run and appear onscreen. The example below shows the Financial Aid APPLICANT_NEED report.

[RETURN TO REPORTING VIEW REPORTS LIST](#)
[Financial Aid Reporting View Reports](#)

SCT Operational Data Store
Reporting View Target: APPLICANT_NEED

Description	Contains detail data for the financial aid applicant's need information by aid year. Details will potentially include data loaded with calculations for total family contributions, gross need, cost of education and unmet need based on either a federal method or an institution method.
Key & Frequency	One row per person per aid year.
Recommended Search Columns	AID_YEAR, PERSON_UID PERSON_UID

Target Column	Business Definition	Database Data Type	Source Name	Source Column
ACADEMIC_PERIOD	Academic period associated with this record.	VARCHAR2(63)	NA	NA
ACADEMIC_PERIOD_DESC	Academic period description.	VARCHAR2 (255)	NA	NA
ADMINISTRATIVE_GROUP	Organization-oriented identifier for the record used to determine access authorization to this record. Institution defined.	VARCHAR2 (255)	NA	NA
AID_PERIOD	Identifies parts of a year that students may be enrolled and receive financial assistance. For example, full year, academic period, etc.	VARCHAR2(63)	RORSTAT	RORSTAT_APRD_CODE
AID_PERIOD_DESC	Financial Aid period description.	VARCHAR2 (255)	FUNCTION	GOKODSF.F_GET_DESC
AID_YEAR	Aid year associated with this record. For example, aid year 0304 (2003 to 2004) or aid year 0405 (2004 to 2005).	VARCHAR2(63)	RORSTAT	RORSTAT_AIDY_CODE
AID_YEAR_DESC	Financial aid year name.	VARCHAR2 (255)	FUNCTION	GOKODSF.F_GET_DESC
COST_OF_EDUCATION	Total cost of education used in the applicant's need calculation.	NUMBER	FUNCTION	RNKNEED.F_CALC_BUDGET_AMT
FM_GROSS_NEED	Gross need of the applicant defined as budget minus total family contribution.	NUMBER	FUNCTION	RNKNEED.F_CALC_NEED_DATA



Section B: Oracle Basic Terms and Concepts

Lesson: Overview

◀ Jump to TOC

Oracle Terms and Concepts

1) Composite and Slotted Tables

ODS Composite Table

- Match element-to-element to the Banner source Composite Views
- Loaded and refreshed from Banner
- Represent a conceptual organizational structure such as Student or a Receivable Customer
- Fine grained access can be applied to them

ODS Slotted Table

- Stores data values for a specific code related to a base table such as test scores
- Used to de-normalize repeating concepts
- Populated from rules in MGRSDAX
- Optimizes speed of queries

2) Views

- A view is a virtual table. It does not physically exist. Rather, it is created by a query joining one or more tables.
- Data from each ODS composite table is presented in one or more reporting views. The ODS reporting views are the views that end users will use to create reports within the ODS. Users will point their report writing tool at these views and build reports.

3) Joins

Inner Join (simple join)

The most common type of join. Inner joins return all rows from multiple tables where the join condition is met.

Outer Join

Returns all rows from one table and only those rows from a secondary table where the joined fields are equal (join condition is met.)

4) Metadata

Tells what data columns are in the ODS, a definition of their business use, the type of data (number, character, date, etc.), how long they are, where they come from (in the source system) and their destination (in the target system.)



Section B: Oracle Basic Terms and Concepts

Lesson: Overview (Continued)

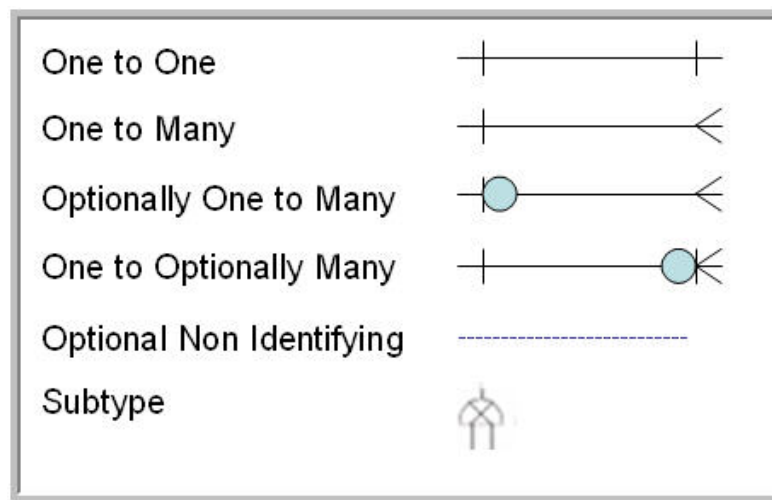
◀ Jump to TOC

Oracle Terms and Concepts, continued

5) Display Rules

- Enable you to control and customize how data stored in your ODS composite tables is displayed in your Reporting views
- Determine the positional location of data in a view, or the hierarchical order in which a particular type of data should be retrieved
- “Positional” display rules are required for all Slotted views
- “Hierarchical” display rules are required for a sub-set of (non-slotted) Reporting views
- Also some used to determine a value stored in either an ODS composite table or displayed in an ODS Reporting view
- Stored in the ODS database table – MGRSDAX

6) ERD Rules of Cardinality



Note: SunGard Higher Education refers to ERDs as Business Concept Views



Section B: Oracle Basic Terms and Concepts

Lesson: Overview (Continued)

◀ Jump to TOC

Oracle Terms and Concepts, continued

7) Primary and Foreign Keys

- A **primary** key is a single field or combination of fields that uniquely defines a record. None of the fields that are part of the primary key can contain a null value. A view can have only one primary key.
- A **foreign** key means that values in one table must also appear in another table. The referenced table is called the parent table while the table with the foreign key is called the child table.

8) Index

- An index is a performance-tuning method of allowing faster retrieval of records
- An index creates an entry for each value that appears in the indexed columns.

9) Cartesian Product

- A Cartesian join is when you join every row of one view to every row of another view.
- A Cartesian join is very CPU intensive, and is usually done by mistake.



Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views

◀ [Jump to TOC](#)

7 Entity Relationship Diagrams:

- 1) Event
- 2) Institution
- 3) Organization Entity
- 4) Person Demographic*
- 5) Person Role*
- 6) Person Supplemental*
- 7) Relationship

*Pertain to Financial Aid

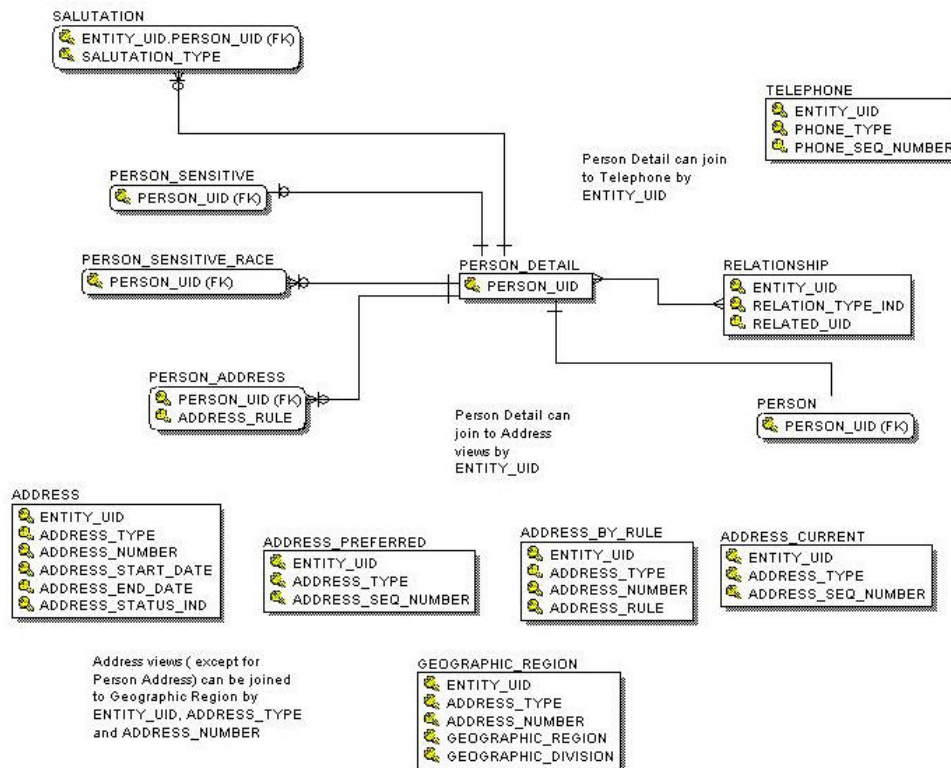


Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views

◀ Jump to TOC

Person Demographic Diagram



Primary View

The PERSON_DETAIL view contains demographic data common to a person across the ODS data model and the institution enterprise. The data is specific to a person independent of whether that person is a student, faculty member, or employee, alumnus, etc. Data reflects only the most current information; changes are not tracked in the ODS.

The data in this view includes current name, Id, gender, birth date, tax id, international details, confidentiality indicator, etc. There is one row per person. Data comes from the person identification (SPRIDEN) and person demographic information (SPBPERS) forms in Banner.

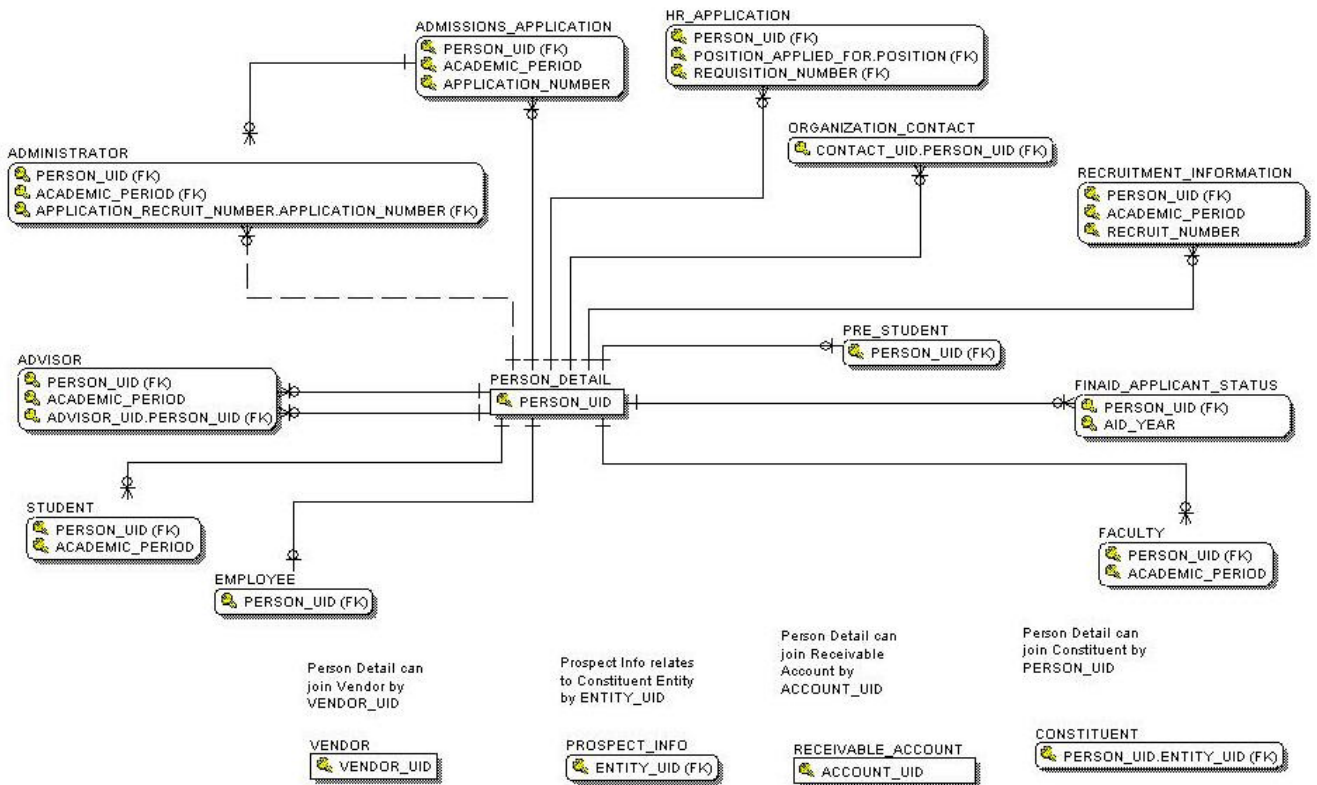


Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views (Continued)

◀ Jump to TOC

Person Role Diagram



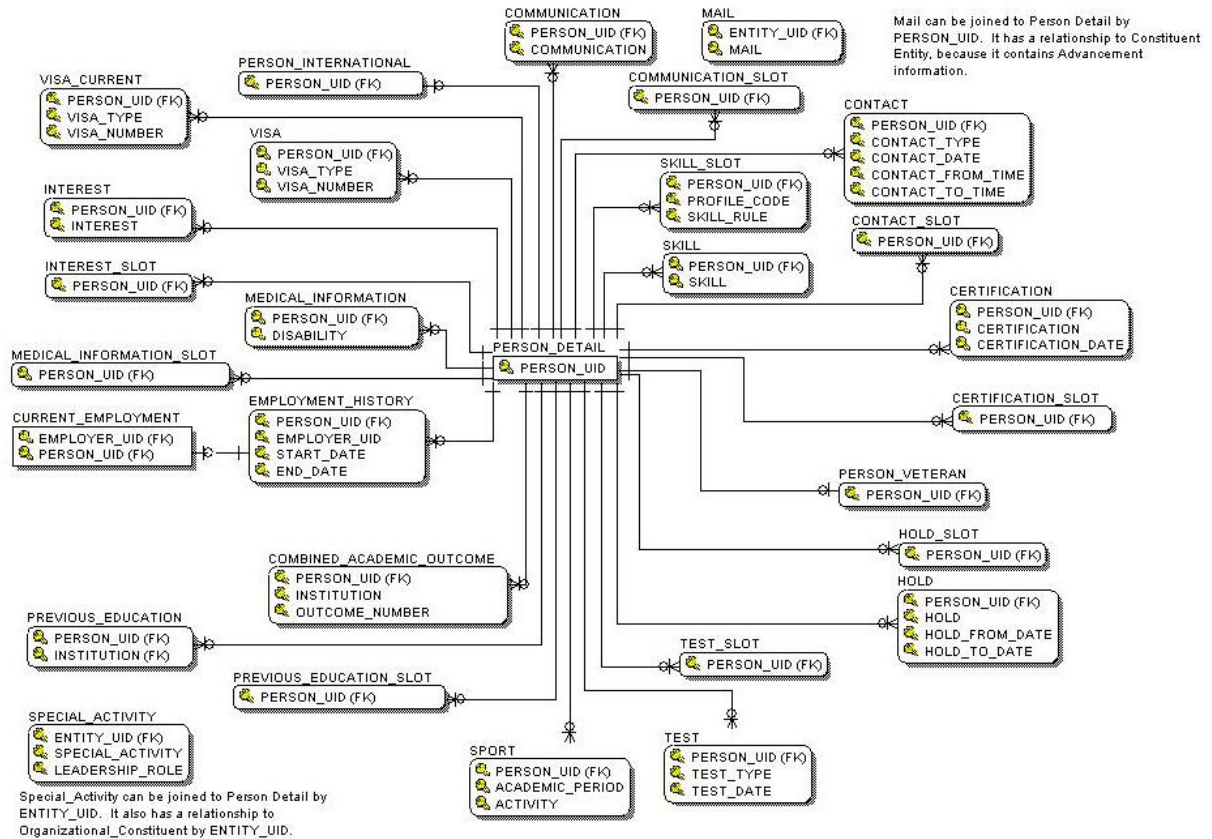


Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views (Continued)

◀ Jump to TOC

Person Supplemental Diagram





Section C: Common Business Concepts Diagrams

Lesson: Address Views and their Purpose

◀ [Jump to TOC](#)

Address views

A brief description of the address views is listed below. More detailed descriptions are included on the pages that follow.

- a) **Address** contains all addresses for an entity, person, institution, or organization.
- b) **Address_By_Rule** contains all addresses for an entity/person, institution, or organization per the display rules.
- c) **Address_Current** contains all active addresses for an entity/person, institution, or organization.
- d) **Address_Preferred** contains all preferred addresses and the associated primary active telephone data for an entity/person, institution, or organization.
- e) **Geographic_Region** contains data about the geographic regions associated with the addresses of an entity.
- f) **Person** contains demographic data (including addresses) common to a person across the ODS data model and the institution enterprise.
- g) **Person_Address** contains information used to add a mailing address to a report or print a mailing label.



Section C: Common Business Concepts Diagrams

Lesson: Address Views and their Purpose (Continued)

◀ Jump to TOC

Address

- Designed to allow the user to apply whatever rules they want to retrieve any address or series of addresses.
- You must understand the rules of selection such as dates and statuses.
- It will return multiple addresses.
- This does not use the address hierarchy approach.
- Advantage - lets you select addresses for future dates (those already coded to return active addresses use the SYSDATE as the date of currency).

Address_By_Rule

- Designed to be the primary address view for use in day to day reporting.
- Will return one currently active address for entity, based on the current date.
- Utilizes the values defined within the MGRSDAX table to identify a hierarchy of addresses to select from, so that a user can get whichever hierarchy of addresses they choose based on the business need (one hierarchy for Admissions, another for Registrar, etc.).
- Set up to use the ODS profile selection, so that individuals can have their own hierarchy that overrides the address rule provided as the default.
- All addresses retrieved by this view could have the parameter set up in the reports to allow for the hierarchy of 'ADMSADDR", but specific individuals, using their own profile, can get the same report, using the same parameters, but with an overridden address hierarchy.
- Most important and most frequently overlooked, is that the ADDRESS_RULE parameter MUST be supplied (along with the UID) or the resultant retrieval will appear as a Cartesian product.

Address_Current

- Designed to allow user to get only current addresses
- Multiple addresses will be returned
- Does not use the address hierarchy approach.



Section C: Common Business Concepts Diagrams

Lesson: Address Views and their Purpose (Continued)

◀ [Jump to TOC](#)

Address_Preferred

- Designed to return only the preferred, current address for an individual.
- Sets the preferred indicator in Banner, checking first in Advancement for a preferred address type, and then defaulting to a GTVSDAX value.
- Returns all preferred addresses that are active, regardless of address type.

Geographic_Region

- Contains data about the geographic regions associated with the addresses of an entity.

Person

- Contains the Preferred Address of the person as set by the preferred address of the institution.
- Preferred Address of the institution is set in the GTVSDAX table – PREFADDR.

Person_Address

- Contains information used to add a mailing address to a report or print a mailing label. Since the main purpose of this reporting view is to support correspondence, only persons who are not deceased will appear in this reporting view. All organizations and companies that are active will be selected for this reporting view.
- This view is the primary address view indicated on metadata business concept diagrams.



Section D: Common Display Rules

Lesson: Overview

◀ Jump to TOC

Introduction

Display rules enable you to control and customize how data stored in your ODS composite tables is displayed in your Reporting views. Display rules determine the positional location of data in a view, or the hierarchical order in which a particular type of data should be retrieved. “Positional” display rules are required for all Slotted views while “hierarchical” display rules are required for a sub-set of (non-slotted) Reporting views. There are also a number of display rules used to determine a value stored in either an ODS composite table or displayed in an ODS Reporting view. All display rules are stored in the ODS database table - MGRSDAX.

Procedure

Follow these steps to set up a display rule.

Step	Action
1	From the Information Access Administrative menu, select Preferences & Security .
2	Select Set Up Data Display Rules . The Set Up a Display Rule page opens.
3	Select Create from the Set Up a Display Rule page . The Create a New Display Rule page opens.
4	Enter the information for the new display rule, or select an existing code from one of the drop-down lists.
5	Click the Save button. The Update an Existing Display Rule page opens.

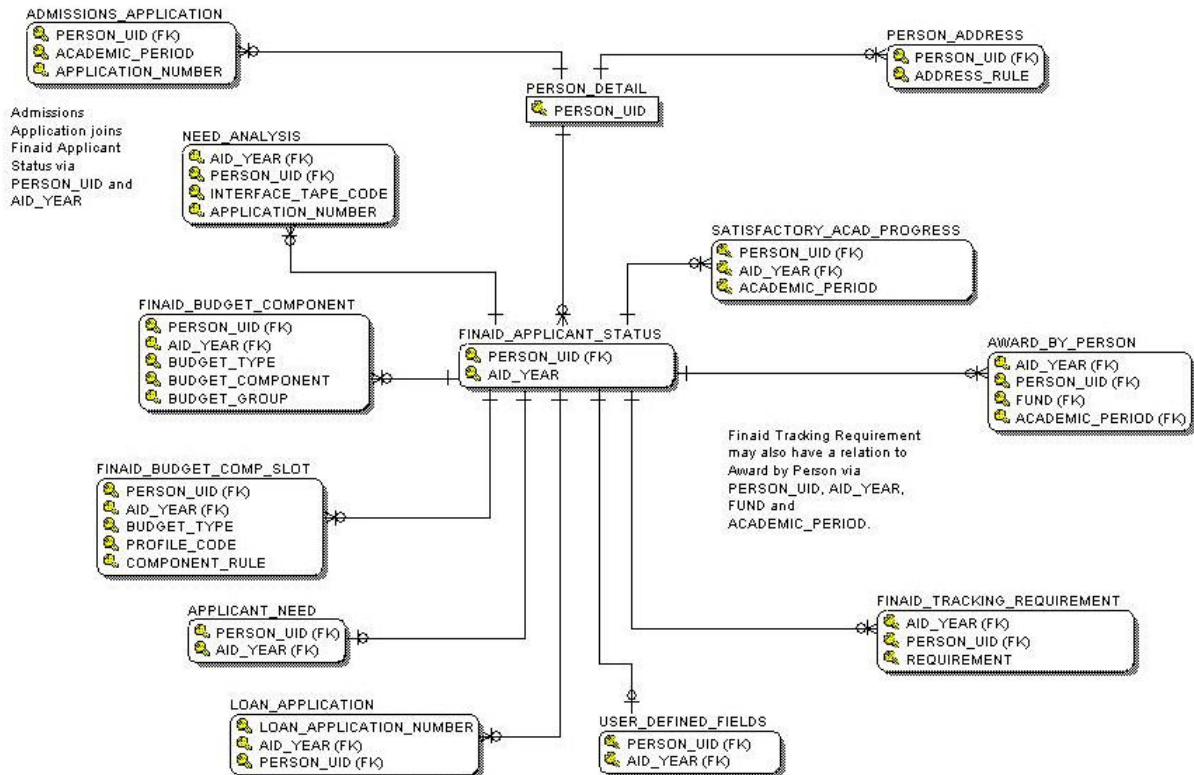


Section E: Financial Aid Business Concept Diagrams

Lesson: Financial Aid Application Diagram

◀ Jump to TOC

Financial Aid Application Diagram



Primary View

The Financial Aid application status view displays details of the aid application. This view retrieves basic Financial Aid applicant data, including identifier information such as ID, budget, tracking and packaging group along with verification information, and total Financial Aid credit and amounts paid information. There is one row per aid year and person. Data on this view comes from the Financial Aid Application Table (RCRAPP1) and Applicant Status Table (RORSTAT).

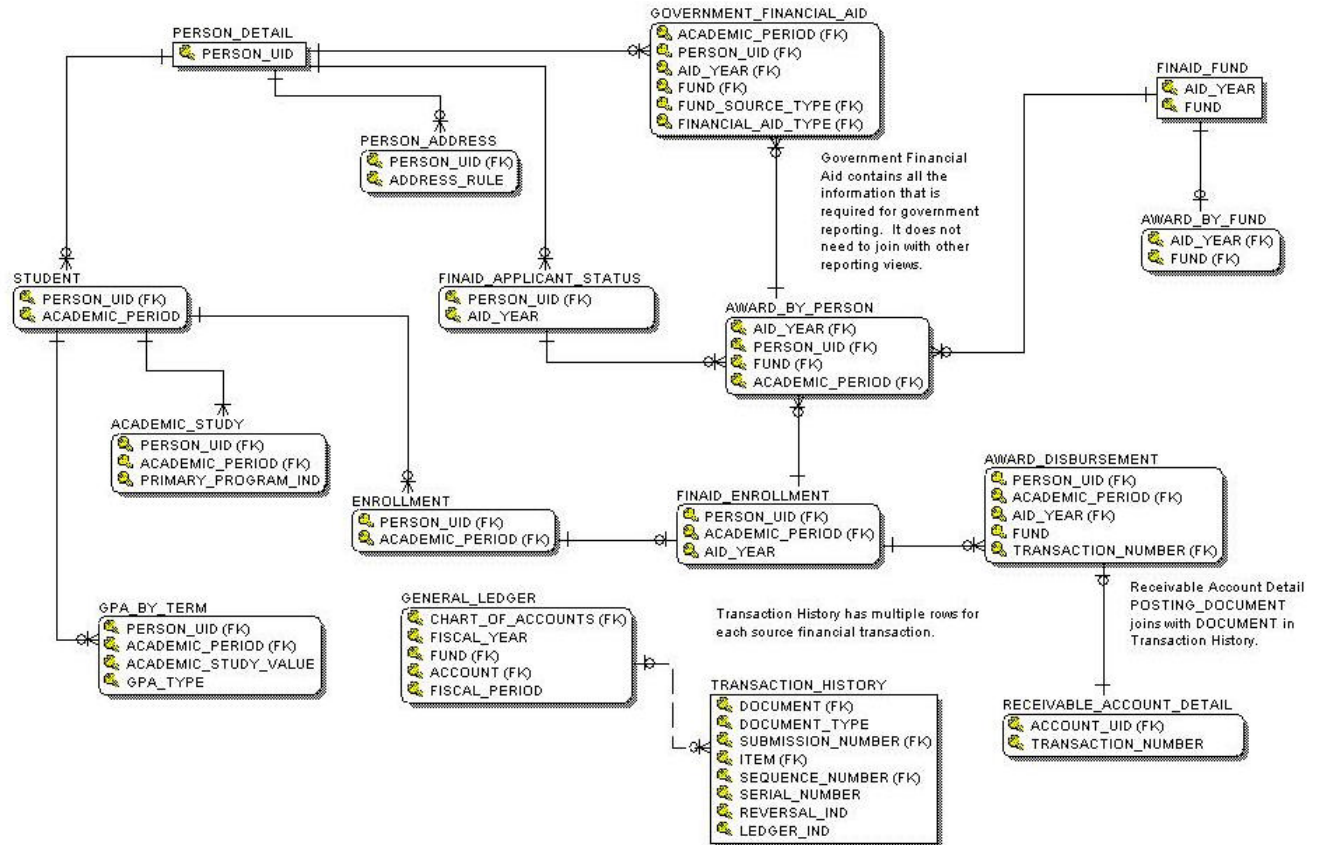


Section E: Financial Aid Business Concept Diagrams

Lesson: Financial Aid Award and Disbursement Diagram

◀ Jump to TOC

Financial Aid Award and Disbursement Diagram



Primary View

The AWARD_DISBURSEMENT view displays Financial Aid disbursement information for each amount credited or planned for the student account. This view retrieves basic Financial Aid disbursement amounts for each fund credited and amounts paid data. There is one row displayed per aid year, per academic period, fund, disbursement and person. Data in the view comes from the Financial Aid Disbursement form (RPRADSB).



Section E: Financial Aid Business Concept Diagrams

Lesson: Financial Aid Fund

◀ [Jump to TOC](#)

Primary View

The AWARDS_BY_PERSON view displays fund awards that are offered, accepted, and disbursed to a Financial Aid applicant. This view retrieves basic Financial Aid fund data, including offered, accepted, rejected, and disbursed aid amounts for a person. There is one row displayed per aid year, academic period, per fund and person. Data in this view comes from the Financial Aid Awards form (RPRATRM).



Section F: Financial Aid Display Rules

Lesson: Overview

◀ [Jump to TOC](#)

Rules

The Financial Aid display rules are listed below.

- GTVSDAX
- FACLADDR
- FAPLADDR
- FASTADDR
- FAWTADDR
- FAWYADDR
- FAPLBCMP
- FAPLTEST
- FAPLTREQ
- MGRSDAX
- ADDRESS
- ADDRESS
- ADDRESS
- ADDRESS
- ADDRESS
- BUDGET COMPS
- TEST
- TRACKING REQS



Section G: Financial Aid Awards Self Service Reporting Templates

Lesson: Overview

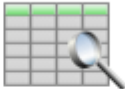
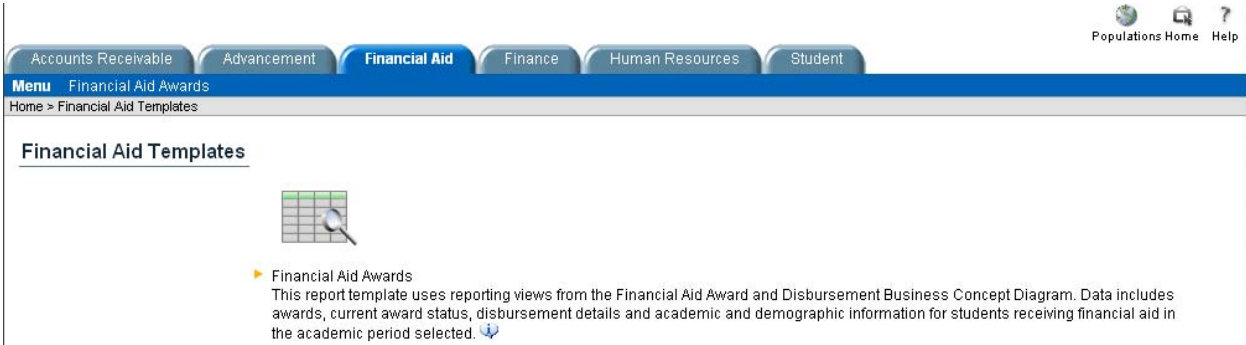
◀ Jump to TOC

Purpose

The Financial Aid Awards Template can be used to search for populations of Financial Aid data. A report will display after you have selected your search criteria and click the **Search** button.

Procedure

Follow these steps to view Financial Aid award data using the template provided.

Step	Action
1	<p>Access the Financial Aid Self Service Reporting application by clicking the Financial Aid Templates link.</p> <p><u>Self-Service Reporting</u></p>  <ul style="list-style-type: none"> ▶ Accounts Receivable Templates ▶ Advancement Templates ▶ Finance Templates ▶ Financial Aid Templates ▶ Human Resources Templates ▶ Student Templates
2	<p>Click the Financial Aid Awards link.</p>  <p>Financial Aid Awards This report template uses reporting views from the Financial Aid Award and Disbursement Business Concept Diagram. Data includes awards, current award status, disbursement details and academic and demographic information for students receiving financial aid in the academic period selected.</p>



Section G: Financial Aid Awards Self Service Reporting Templates

Lesson: Overview (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
3	<p>Enter your Search Criteria by clicking the appropriate link.</p> <p>The screenshot displays the 'Financial Aid Awards Search Criteria' web application. At the top, there is a navigation menu with tabs for 'Accounts Receivable', 'Advancement', 'Financial Aid' (selected), 'Finance', 'Human Resources', and 'Student'. Below the menu, the breadcrumb trail reads 'Home > Financial Aid Templates > Financial Aid Awards Search Criteria'. The main heading is 'Financial Aid Awards Search Criteria'. A 'Search Rule' dropdown is set to '- None -'. There are 'Search' and 'Reset Search' buttons. Under 'Recommended Search Criteria', there are four dropdown menus: 'Academic Period' (with a note '- Academic Period must be selected -'), 'Fund', 'Fund Source Type', and 'Financial Aid Type'. Below these are radio buttons for 'Financial Aid Disbursed' (All, Yes, No). A section for 'Additional Search Criteria' includes expandable links for 'Financial Aid Award Search Criteria', 'Financial Aid Credits Search Criteria', 'Financial Aid Applicant Status Search Criteria', 'Academic Study Search Criteria', 'Student Status Search Criteria', 'Additional Student Academic Search Criteria', and 'Demographic Search Criteria'. A second set of 'Search' and 'Reset Search' buttons is present, along with another 'Search Rule' dropdown. At the bottom, there is a 'Show SQL' button.</p>



Section G: Financial Aid Awards Self Service Reporting Templates

Lesson: Overview (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
4	After you have entered your search criteria, click the Search button.
5	View the results of the search.

Populations Home Help

[Accounts Receivable](#)
[Advancement](#)
[Financial Aid](#)
[Finance](#)
[Human Resources](#)
[Student](#)

Menu **Financial Aid Awards**

Home > Financial Aid Templates > Financial Aid Awards Search Criteria > Financial Aid Awards List

Financial Aid Awards List

Search Rule: - None -

	610009608	Onofrio, Joseph	199610	Fall 1995	SWS	State	Work	Offered	04-OCT-95	Y	N	N	N	50.
	210009609	Phillips, Sandra	199620	Spring 1996	FWS	Federal	Work	Accepted	06-OCT-95	N	Y	N	N	40.
	210009609	Phillips, Sandra	199620	Spring 1996	PERK	Federal	Loan	Accepted	06-OCT-95	N	Y	N	N	50.
	210009609	Phillips, Sandra	199620	Spring 1996	STFD	Federal	Loan	Accepted	06-OCT-95	N	Y	N	N	50.
	210009609	Phillips, Sandra	199610	Fall 1995	FWS	Federal	Work	Accepted	06-OCT-95	N	Y	N	N	60.
	210009609	Phillips, Sandra	199610	Fall 1995	PERK	Federal	Loan	Accepted	06-OCT-95	N	Y	N	N	50.
	210009609	Phillips, Sandra	199610	Fall 1995	STFD	Federal	Loan	Accepted	06-OCT-95	N	Y	N	N	50.
	610009501	Pikus, Allan P.	199620	Spring 1996	STFD	Federal	Loan	Offered	04-OCT-95	Y	N	N	N	50.
	610009501	Pikus, Allan P.	199620	Spring 1996	UNSTFD	Federal	Loan	Offered	04-OCT-95	Y	N	N	N	50.
	610009501	Pikus, Allan P.	199620	Spring 1996	PELL	Federal	Grant	Accepted	04-OCT-95	N	Y	N	N	50.
	610009501	Pikus, Allan P.	199610	Fall 1995	PELL	Federal	Grant	Accepted	04-OCT-95	N	Y	N	N	50.
	610009501	Pikus, Allan P.	199610	Fall 1995	UNSTFD	Federal	Loan	Offered	04-OCT-95	Y	N	N	N	50.
	610009501	Pikus, Allan P.	199610	Fall 1995	STFD	Federal	Loan	Offered	04-OCT-95	Y	N	N	N	50.
	610009506	Scott, Drew	199620	Spring 1996	STFD	Federal	Loan	Offered	04-OCT-95	Y	N	N	N	50.

Records Found: 212 [Records Per Page: 100](#)



Section H: Exercise

Lesson: Run Financial Aid Sample Reports

◀ Jump to TOC

Sample Reports Exercise

Run the following sample reports using the Report Name, Business Concept Diagrams and Joins, Views and Data Columns, and Parameters, Groups, Filters.

Report Name	Business Concept Diagram and Joins	Views and Data Columns	Parameters, Groups, Filters, etc.
Work Study Students by Academic Period	Financial Aid Award and Disbursement BCD Join Person_Detail to Government_Financial_Aid and Student (using Person_UID)	Person_Detail ID, Full_Name_LFMI Government_Financial_Aid Fund, Academic_Period Student Student_Classification,	Parameters Academic_Period Filters Student_Classification=FR, Fund=(Work Study code)
Scholarship Recipients	Financial Aid Award and Disbursement BCD	Award_By_Person Aid_Year, Fund, Fund_Title, ID, Name, Award_Offer_Amount, Award_Accept_Amount	Parameters Fund, Aid_Year
Grant Recipients and their Academic Progress	Financial Aid Award and Disbursement BCD Join Person_Detail to Government_Financial_Aid and Government_Student (using Person_UID) Join Government_Student to GPA_By_Term (using Person_UID and Academic_Period) Join Government_Financial_Aid to Satisfactory_Acad_Progress (using Person_UID and Academic_Period)	Person_Detail ID, Full_Name_LFMI Government_Student County_Desc, Cumulative_GPA GPA_By_Term Credits_Attempted, Credits_Earned Government_Financial_Aid Tax_ID, Paid_Amount, Fund Satisfactory_Acad_Progress Satisfactory_Acad_Prog_Code, Satisfactory_Acad_Prog_Desc	Filters Fund=(TEOG code)



Section H: Exercise

Lesson: Run Financial Aid Sample Reports (Continued)

◀ Jump to TOC

Sample Reports Exercise, continued

Report Name	Business Concept Diagram and Joins	Views and Data Columns	Parameters, Groups, Filters, etc.
Expected Family Contribution	Financial Aid Application BCD	Need_Analysis ID, Name, Total_Family_Contribution_Fed, INAS_TFC, Aid_Year	Parameters Aid_Year Calculated Fields FED_INAS_Match=If Total_Family_Contribution_Fed <> INAS_TFC TFC=If Total_Family_Contribution_Fed is missing then 0, else Total_Family_Contribution_Fed



Section I: Appendix

Lesson: 55 Reporting and Slotted Common Views

◀ Jump to TOC

Purpose

The table below lists the 55 reporting and slotted common views.

Activity	Hold	Person International
Address	Hold_Slot	Person_Sensitive
Address_By_Rule	Institution	Person_Sensitive_Race
Address_Current	Institution_Characteristic	Person_Sensitive_Race_Slot
Address_Preferred	Institution_Demographic	Person_Veteran
Certification	Inst_Characteristic_Slot	Previous_Education
Certification_Slot	Interest	Previous_Education_Slot
Combined_Academic_Outcome	Interest_Slot	Relationship
Communication (Mailing)	Mail	Salutation
Communication_Slot	Mail_Slot	Secondary_School_Subject
Contact	Medical_Information	Skill
Contact_Slot	Medical_Information_Slot	Skill_Slot
Current_Employment	Organization_Entity	Telephone
Cross_Reference_Slot	Organization_Entity_Address	Test
Employment_History	Past_Employment_Slot	Test_Slot
Event	Person	Validation
Geographic_Region	Person_Address	Visa
Geographic_Region_Institution	Person_Detail	Visa_Current
		Year_Type_Definition



Release Date

◀ [Jump to TOC](#)

This workbook was last updated on 10/15/2007.