Data Warehouse
Student Data User Group
Meeting

February 25, 2016
Data Warehouse Student Data Users Group

Agenda

- Recent System Upgrades
- New version of Business Objects
- Pennant Accounts Data Warehouse update
- Graduate Funding Data Warehouse update
- New / Changed tables in Student data collection
- Misc topics
Business Objects – Upgrade to BI4
What is it and why are we upgrading?

• Business Intelligence 4 (BI4) is the next big release after our current version (XI3)
  ➢ Penn is a “late adopter”
  ➢ XI3 will soon be out of support

• New software, new server
  ➢ As with XI3, reports are created/edited and refreshed all via the web
  ➢ NO report conversion is expected
  ➢ There are some changes for Webi and InfoView (icons in different places, tool bars behave differently)
What’s New?

InfoView is now called **BI Launchpad**, with *Reading* and *Design* modes

- Creation date can be displayed in document list
- Enhanced document search
- Multiple reports (files) can be open at once – no need for multiple sessions
- Freeze table headers in Reading mode
- Fit to Page is back
- Variables functionality – dimension grouping and list of values
- Can hide tables, dimensions, cells, sections
- Webi Data Preview pane
- Non-Java option
Migration plan

• Completing activities this Spring:
  – Testing and any needed adjustments to the new environment
  – Update FAQs, HowTos and other documentation
    • Knowledge Link training module for new and existing users
  – Show and tell meetings
  – All InfoView/Webi users and documents migrated at once, after which use switches to BI4
BI4 Launchpad – Home Tab
BI4 Launchpad – Documents tab
BI4 Web Intelligence (Webi) Application

- BI 4 Webi has two modes "Reading" and "Design"
- Reading mode – single row of tools
- Design mode – 2 row tabbed menu bar with each tab grouping related tools.
BI4 Web Intelligence (Webi) Application

- Launching an *existing* document opens a new tab in "Reading" mode.
BI4 Web Intelligence (Webi) Application

- Clicking refresh prompts for input and runs the report as before.
BI4 Web Intelligence (Webi) Application

- When you create a *new* document, Webi prompts for a data source as before.
- New feature: you can do this while the previous report refreshes in the background.
BI4 Web Intelligence (Webi) Application

- The main difference is that it displays a separate query design window.
BI4 Web Intelligence (Webi) Application

- Nice new feature: From Query Panel - Preview query results without going back to the report.
BI4 Web Intelligence (Webi) Application

- Once you are in the report designer there are some neat new (and returning) features.
BI4 Web Intelligence (Webi) Application

- Hide and unhide content
- Press delete to remove a column
- Table/chart option to hide zero values
- Dimension grouping has returned
BI4 Web Intelligence (Webi) Application

- Now you can freeze table headers in reading mode.
BI4 Web Intelligence (Webi) Application

- You have a unified view of save destinations.
BI4 Web Intelligence (Webi) Application

- Fit to page in print settings!
- List of values returns to the formula editor!
Pennant Accounts Data Warehouse

- Tips/FAQs
- Future releases
- Data questions to student-wh@lists.upenn.edu

http://www.upenn.edu/computing/da/dw/PennantAccounts/
• In the Pennant Accounts universe, you will now find **Sum Paid Applied Amt** and **Sum Unapplied Payment** in the Student Account Detail folder, even though those objects actually come from other tables.

• A new calculated object, **Transaction Balance**, provides the unpaid balance: the difference between the billed transaction amount and the paid applied amount.

• Also in the Student Account Detail folder, you will find the **Student Name**, even though this actually comes from the Person table.
• A reminder: if there is no Degree Term record for a student for the selected term, they won’t get picked up by the query.
• The universe join guarantees it will only get Primary Degree (and Major 1)

• **Student Account Balance** and **Student Account Holds** are not term-specific. If you use items from those tables along with items from the other student account tables, you may get back odd results.
Graduate Funding Data Warehouse

- Universe changes
- Data questions to: gradfunding-wh@lists.upenn.edu

http://www.upenn.edu/computing/da/dw/gf/
In the Grad Funding universe, you will find Degree Term, Student Term, and the Major term tables, inside the GF Student folder.

- We recommend that you get the term-specific academic program information from these tables, instead of GF_Student_Program/GF_Academic_Program.
- You will need to explicitly say which term in Degree Term (from there it joins on Term and Penn_ID to Student Term and Major Minor Term.)
We’ve created some derived tables in this universe, allowing us to show the Banner Term alongside the SRS term in Degree Term, and likewise to show the SRS term alongside the Banner Term in GF Allocation Charge. (Note: these are not in the underlying tables – you will only see these in Business Objects.)
For people who use the General Ledger (FINQUERY universe):

- Remember: To see the breakdown by tuition, general fee, clinical fee, health insurance, you will need to look at the Charge Type in GF_Allocation_Charge, and at the Detail Code in Pennant Accounts; you will not be able to get it from the object codes in the GL.
- For Grad Funding transactions sent to the GL you will now see the student’s Penn_ID in “Attribute 3” and the Banner Term in “Attribute 1” in GL_Detail.
New table: TRANSCRIPT_TEXT

• Source: SRS screen 124
• Does not include text from position ‘H’ (honors). Transcript text related to the Honors position will still be found in the TRANSCRIPT_HONORS table
• Added to the STDTCANQ universe: joined to DEGREE_PURSUAL on Penn_ID and Career (note: this is not joined using dp_link_id)
• Documentation: http://www.upenn.edu/computing/da/dw/student/transcript_text.t.html
Use caution when searching for specific words or text strings. Transcript text is free-form text. SRS does not check spelling or format. The extract does not remove extra spaces.

<table>
<thead>
<tr>
<th>Penn Id (TT)</th>
<th>Career(TT)</th>
<th>Position Code (TT)</th>
<th>Transcript Text (TT)</th>
<th>Division (DP)</th>
<th>Degree Pursued (DP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10278313</td>
<td>U</td>
<td>1</td>
<td>Eloline B. Wright Award, 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>10719229</td>
<td>U</td>
<td>1</td>
<td>Phillip E. Goldstein Class of '34 Shakespearean Prize, 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>11155687</td>
<td>A</td>
<td></td>
<td>Internship Summer 2015, Internship Summer 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>11194175</td>
<td>U</td>
<td>1</td>
<td>Bassari Writing Apprenticeship at the Center for Programs in Contemporary Writing, 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>11414713</td>
<td>U</td>
<td>A</td>
<td>Internship Summer 2013, Internship Summer 2014, Internship Summer 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>16594782</td>
<td>A</td>
<td></td>
<td>C.F. Laubert Prize 2014, Max Kade Foundation Prize 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>20088608</td>
<td>U</td>
<td>1</td>
<td>Roy and Diana Vagelos Prize for a Senior Planning Graduate, Study 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>22503392</td>
<td>U</td>
<td>1</td>
<td>Lina A. Ruiz Ruiz Memorial Award in Hispanic Studies, 2015 (Winner).</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>22708347</td>
<td>U</td>
<td>1</td>
<td>Dr. Rosane Rocher Prize, 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>23003087</td>
<td>U</td>
<td>A</td>
<td>Internship Summer 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>27837959</td>
<td>U</td>
<td></td>
<td>Simon Kuznets Fellowship Award in Economics, 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>29090452</td>
<td>U</td>
<td>1</td>
<td>Department of Anthropology Prize (Winner), 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>30982454</td>
<td>U</td>
<td>1</td>
<td>Henrietta M. Kellar Prize, 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>31589095</td>
<td>U</td>
<td>D</td>
<td>B20/2015 Full disciplinary hold placed on grades, registration materials, transcripts, degree.</td>
<td>COL</td>
<td>BA</td>
</tr>
<tr>
<td>32520394</td>
<td>U</td>
<td>A</td>
<td>Internship Summer 2014, Internship Summer 2015.</td>
<td>COL</td>
<td>BA</td>
</tr>
</tbody>
</table>
Normally, the DW tables in the Student collection are refreshed completely for any student with any changes in SRS that day.

In order to capture more than just “today’s activity” for the new TRANSCRIPT_TEXT table, and also for the recent changes to the INTERNAL_COURSE_EQUIV table (see the November SDUG minutes) we will need to add records to a nightly load over-flow file.

The nightly load has a max (20,000 students) so picking up all of the history records will have to take place over a succession of nights.
- Caution when Changing/Adding Major/Minor codes
- SAT changes coming – additional sets of scores