Academic Advising
Batch Academic Advisement Reports

Overview

This document illustrates how to run batch Academic Advisement Reports (AARs) for a specific group of students.

Depending upon the desired outcome, batch AAR processing is either a two-step or a three-step process.

- If the data is to be retrieved only from the Report Results Tables (via the IUIE) only the first two steps need to be completed.
  - The data should be available in the IUIE the day after the batch run.
- If actual .pdf/"hard" copies of the AARs are desired, all three steps of the process need to be completed.
  - The three-step process also places data into the IUIE for retrieval 24 hours after the batch process has executed.

Security must be granted to run batch AARs. Since the AAR batch runs utilize considerable system resources the following should be taken into account:

- Security should only be requested for one or two staff members in a school or department. Security will not be granted, for example, to all advisors in a school.
- You will need to be very familiar with this document to have security granted.
- Email IU-UITS-AA@exchange.iu.edu to receive security for Batch AARs.
- Batch runs that involve thousands of students should be avoided and broken into smaller runs.
  - Larger schools should run batch AARs at the plan level instead of the program level whenever possible.
- Whenever possible, it is desirable for one batch AAR to run to completion before running a second batch.
- Administrative users can store and archive batch AARs. In order to store a snapshot of that particular moment in time, the archived AARs will use the Printer Friendly version. The archived AARs will be saved on the Network Attached Storage (NAS) provided by Oracle and there will be no charge to departments for use of this functionality. Access to these reports will be available for ten years from the date of archive.
Steps

Running a Batch of Academic Advisement Reports

This is a three step process. The three steps are: generate request, generate reports and print reports.

Generate Report Requests: Phase I

1. First you must gather the student population that is to be contained in the batch run.
2. Navigate to: Academic Advisement>Advisement Processes>Generate Report Requests
3. If you have an existing Run Control ID (in uppercase) you wish to use, enter it and click .
   - Maximum number of rows to return (up to 300): 300
   - Search by: Run Control ID begins with IN_OLSBSBS_12_22_20
4. If you do NOT have an existing ID click on Add a New Value and enter the Run Control ID (RC) you wish to use and click .
   - Up to 30 characters may be used
   - It is imperative that the following naming conventions be strictly adhered to in order to avoid accidentally accessing or deleting the wrong batch run
   - The Run Control ID MUST be mnemonic and consist of the following:
     - First two characters = Institution (BL, IN, CO, SE, EA, NW, KO, or SB)
     - Following characters should be the name of the program, plan, group, etc. that is being run
     - The date of the run should be the last item entered in the RC id
     - Example: IN_OLSBSBS_12_22_2011
       - IN = institution
       - OLSBSBS = plan (would be TECH1 if the entire program is being run)
       - 12_22_2011 = date of batch run

6. Select the Academic Institution from the drop-down list.
7. Enter the Report Type.
8. ALWAYS enter “Batch” as the Report Identifier.
9. Select PS Query from the Selection Tool drop-down list.
10. Use the to find the Query Name of the query used to gather the desired batch of students.

   One of the following four queries should be used for batch runs:
   a. SAA_RPT_PROGPLAN: Will pull in all students in a specific Program and Plan combination. Both Program and Plan are required fields.
   b. SAA_RPT_PROGPLAN_W_STATUS: Performs identically to the above query, but allows the addition of the Degree Checkout Status as a parameter.
c. SAA_RPT_PROGRAM: Will pull in all students in a specific Program. **Program** is a required field.

d. SAA_RPT_PROGRAM_W_STATUS: Performs identically to the above query, but allows the addition of the Degree Checkout Status as a parameter.

| Caution: | Whenever possible run one of the queries that takes the batch down to the Plan level. While it can be done, running entire Programs in a single batch run could take several hours for larger Programs and could become extremely slow if multiple Programs are being executed simultaneously by different schools. An entire Career should NEVER be selected for a batch run! |

11. Click **Edit Prompts**.

12. Enter the academic structure for the batch run. All displayed fields are required fields!

13. Click **OK**.

14. This takes you back to **Generate Report Requests**, now click **Run**.

15. The following page should display. Make sure that CAUNIX is selected from the drop-down list as the **Server Name**. All other fields should display as they are seen below.

16. Click **OK** to return to the original page and click on the **Process Monitor** link (see below).
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17. Phase I should be complete when the following line states Success and Posted in the indicated areas. **Refresh** may be clicked as often as desired to advance the screen to the Success/Posted stage OR you may simply exit these screens and return to Phase II later.
Generate Advisement Reports: Phase II

This phase uses the student population generated by the first phase (Generate Report Requests) to create the actual data in the AARs.

After completion of this step, the data is stored in a series of tables known as the "Report Results Tables".

1. Navigate to: Academic Advisement>Advisement Processes>Generate Advisement Reports

2. Enter Institution, Report Type, and the same Run Control ID used in Phase I.

3. After entering the Run Control ID and pressing the tab key, any Additional Run Control Parameters that may display now disappear.

4. Click Run.

5. This will take you to the Process Scheduler Request page. Make sure it contains the values you see below.
6. Click **OK**.

7. Click the **Process Monitor** link.

8. Periodically click **Refresh** until the **Run Status** field = “Success” and the **Distribution Status** field = “Posted”.
   - This process can take a long time if a large batch is being attempted.
   - This is the lengthiest part of the process.

9. The **Run Status** should equal Success and the **Distribution Status** should equal Posted before proceeding to the next step.

10. If you want to retrieve AAR data ONLY from the IUIE, this step is the last step necessary to complete. Refer to the end of this document for a description of the IUIE report.
Print Batch Reports: Phase III

This phase uses the data stored in the report results tables from the previous step and creates a .pdf version of the AARs. The current printer friendly AAR template is used in this process. If you only want to access the data from the IUIE, this Phase may be skipped.

1. Navigate to: Academic Advisement>Advisement Processes>Print Batch Reports.

2. Select the **Run Control ID** you have been using and click **Search**. If this is the first time you have used this ID, you will need to Add a New Value.

   ![Print Batch Reports](image)

   Maximum number of rows to return (up to 300): **300**

   **Search by:** Run Control ID begins with IN_OLSBSBS_12_22_20

   ![Search](image)

   Find an Existing Value | Add a New Value

3. The **Institution**, **Report Type**, and **Run Control ID** should be consistent with the other two steps.

   ![Print Batch Reports](image)

   *Run Control ID:* IN_OLSBSBS_12_22_2011

   ![Run](image)

   ![Academic Institution](image)

   ![Report Type](image)

   ![Run Control ID Used By Request AAR](image)

   ![Archive Batch AAR](image)

   ![Archive Description](image)

4. The **Archive Description** is optional, but should be used as an aid in locating the desired batch after it has been archived. Not using the description could make the batch harder to distinguish from other runs of this type. All of the .pdf files created are archived for future use.

5. Click **Run**.
6. On the Process Scheduler Request page, select CAUNIX as the **Server Name**. Click only the check box on the first line of the Process List.

![Process Scheduler Request](image)

7. Click the check box on the first line of the Process List and leave the bottom check box blank.

8. Click **OK**.

9. You should be returned to the *Print Batch Reports* page. Click the **Process Monitor** link.

![Print Batch Reports](image)

10. In the **Process Monitor** screen click **Refresh** periodically until the **Run Status** and **Distribution Status** fields display "Success" and "Posted" respectfully. Note that there are three rows to watch for the print process.
11. Once the fields display as indicated, the process is complete and the batch .pdf AARs can be retrieved.

Retrieving Batch .pdf AARs

Once the third step of the process has been completed, the batch AARs are archived for future use. An individual batch is most easily retrieved by using the Run Control ID that was used to generate the batch, but other retrieval options are also possible.

1. Navigate to: Academic Advisement>Student Advisement>Archived Batch AAR.

2. Enter the appropriate search values. If using the Run Control ID, type the one used in the previous steps.
3. Click **Search**.

4. When a batch is retrieved, it is in the order by which it was created.

5. It may be sorted by Student ID.

6. Or by Name.

7. Each archived AAR is retrieved and viewed by clicking **View AAR** at the far right.
Using the IUIE Data Extract Report

1. A Data Extract Report (DER) in the IUIE may be used to create reports using the data generated by a batch AAR run.

2. The data in the DER cannot be accessed in the IUIE until the day following the batch.

3. The report that should be used is located in the following folder:
   - Student > Academic Advising > Report Results Table
   - The current report is named “Report Results Table Results Tables”

4. Assuming the Academic Advisement Report is programmed to do so, several different individual reports may be generated from the IUIE DER including:
   - Which students qualify for upper division certification and have completed necessary requisites to be transferred
   - Which students are not completing certification requirements and need to be contacted to ascertain if they are looking at a different major or just postponing certain courses
   - Which student are close to the limit of hours allowed by UDIV & UCOL and need to concentrate more on certification requirements
   - Which students that have a check-out status of “in review” have successfully completed all requirements to graduate
     a. This can be created using two batch runs…one including in progress courses and one that does not
     b. The two reports could then be compared to determine who may be immediately certified for graduation and who must wait until the final grades are posted
   - Which students have completed all requirements for graduation, but have not been placed into the in review status
   - What is the average GPA for students that have completed a certain requirement
   - What student (and how many) still need to complete a certain requirement
   - Which students have completed their seminar (freshman or otherwise) class requirement
   - Which students have had a certain requirement either waived or changed
     a. If changed, what are those changes?
   - Most of the above could have comparisons run at the end of each term if the reports are retained from one semester to another
     a. Example: How many student complete requirement xyz in the fall term as compared to the spring term
5. All of the above reports should require minimal Excel skills such as filtering, sorting, and column manipulations

6. For training on how to use the IUIE, please refer to the SIS Training & Support web site at http://usss.iu.edu/sites/sistrainingsupport/default.aspx.