

Student Reporting Best Practices & Standards

Created: 5/9/2016

Last edited: 10/26/017

STUDENT REPORTING BEST PRACTICES & STANDARDS

The Student Reporting Project team has set forth a number of standards that current and future standard content reports must adhere to. The intent of this document is to outline the standard components that each report should meet as it is developed or improved, cultivating a consistent look and feel for report consumers.

Report authors must provide justification to the Governance Committee for exceptions to the guidelines outlined in this document. See the Operating Procedures of the Governance Committee for more details on that process.

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STUDENT REPORTING BEST PRACTICES & STANDARDS

REPORT TITLES, SCREEN TIPS & DESCRIPTIONS

The following section describes the format to be followed when developing a title, screen tip and description for a report.

1. Report title
 - a) Short, yet descriptive
 - b) Limit abbreviations
 - c) Indicate primary subject matter within folder subject

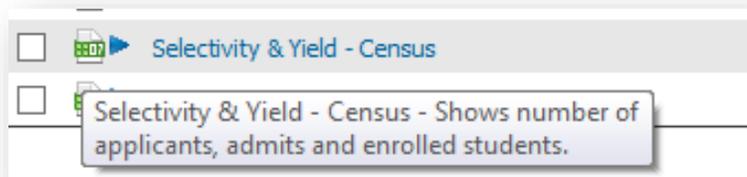
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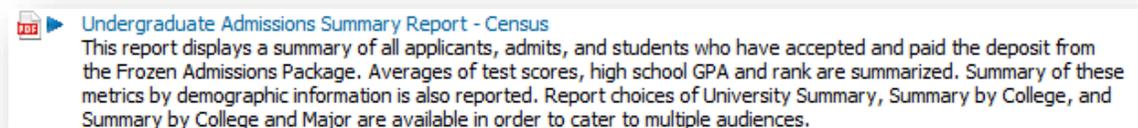
- d)** Include the suffix “ - Frozen” if the consumer is able to select the freeze event in a prompt. If the freeze event is hard coded, the suffix should be the name of the freeze event. Reports that use live data and retention reports do not need a suffix. Examples:
- (1) University Retention Report
 - (2) Degrees Conferred - Term End
 - (3) Selectivity & Yield - Census
 - (4) List of Current Admits
 - (5) List of Current Admits – Census
 - (6) Student Credit Hour Load - Frozen
- e)** Identical to the title on the report page and the TITLE field in the Metadata & Change Documentation page of the report

2. Screen tip



- a)** Limit to one sentence (100 character max).
- b)** Identical to the EXECUTIVE_SUMMARY field in the Metadata & Change Documentation page of the report

3. Description



- a)** Short paragraph describing
- (1) Data being queried
 - (2) Population(s) viewed in the report
 - (3) Intended audience
 - (4) Purpose of the report or questions that can be answered by the report

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- b)** Identical to the PURPOSE field in the Metadata & Change Documentation page of the report

PROMPT PAGES

The following section describes the format to be followed when designing a prompt page. Many of these items are covered in the standard content template. The general guidelines are shown here to assist you as you build content of your own.

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Degrees Conferred - Term End

Reports official degrees conferred. This report totals the number of degrees awarded and the number of students earning a degree. The number of degrees awarded will be higher than the number of earners because students can be awarded multiple degrees in multiple programs.

Required Prompts

For academic year, select the leading summer, fall and spring. Example - Summer 2016, Fall 2016 and Spring 2017

Academic Period	Campus	Student Level	Select Summary Pages
<ul style="list-style-type: none">Summer 2017Spring 2017Fall 2016Summer 2016Spring 2016Fall 2015Summer 2015Spring 2015Fall 2014Summer 2014Spring 2014 <p>Select all Deselect all</p>	<ul style="list-style-type: none">PHG - Hannover GermanyPWL - West LafayetteTAN - AndersonTCO - ColumbusTDC - Dual CampusTDY - IndianapolisTEK - ElkhartTGB - GreensburgTKO - KokomoTLF - LafayetteTMN - Muncie <p>Select all Deselect all</p>	<ul style="list-style-type: none">UndergraduateProfessionalGraduate <p>Select all Deselect all</p>	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Associates<input checked="" type="checkbox"/> Certificate<input checked="" type="checkbox"/> Baccalaureate<input checked="" type="checkbox"/> Masters - Doctoral<input checked="" type="checkbox"/> Professional <p>Select all Deselect all</p>

List of Students

- Include an output page with a list of students
- Summary output only

Populate Optional Prompts

Optional Prompts

The drill down buttons will refine the department and major options.

College Grouping	Department	Major
<div style="border: 1px solid gray; height: 100px;"></div>	<div style="border: 1px solid gray; height: 100px;"></div>	<div style="border: 1px solid gray; height: 100px;"></div>

Program

1. Prompt page
 - a) White background
 - b) Default font and size

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- c)** Maximum width should be 1024 pixels (iPad landscape width)
- d)** Left and top align everything including the title, prompts and the prompt buttons.
- e)** Title should match the report name
- f)** Include a report description that should be identical to the PURPOSE field in the Metadata & Change Documentation page of the report.
- g)** Additional general instructions or notes should be placed under the title and description.
- h)** Place prompts in a table format with multiple columns—no more than 4 columns wide. The end user should not have to scroll horizontally to view prompts on larger tablet or desktop.
- i)** Place prompt headings above the prompt in bold font, aligned top and left with padding of 0.1 in. Heading should not contain punctuation unless it is a complete sentence.
- j)** If there are no optional prompts, the entire optional prompt section should be deleted from the prompt page or assigned to a variable that will ensure that it does not render when the report is run from Cognos Connection.
- k)** Place the prompt buttons under the report path
 - (1) Use default text such as “Cancel”, “Back”, “Next” and “Finish”
 - (2) Do not use Next and Back if report contains only one prompt page
 - (3) Place in the following default order
 - (I) Cancel
 - (II) Back
 - (III) Next
 - (IV) Finish
 - (4) Bold text

2. Prompts

- a)** Use List of Values (LOV) to build prompts unless using freeze packages. One case where this is an exception is Academic Period because the LOV will show all academic periods ranging from Fall 1936 to many terms out into the future. Other than the freeze packages and the Academic Period field in the live packages, the report author must justify any case when LOV fields are not used for prompt queries.
 - (1) Query on (use) codes
 - (2) Display descriptions
 - (3) Do not use colons after prompt labels

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- (4) For variables such as Campus, College, Major, and Program concatenate the code and description (e.g. PWL - West Lafayette, PI - Polytechnic Institute). The one exception to this is if you are using ACADEMIC_SCHOOL_GROUPING_DESC from one of the CIP tables. In that instance, only use the description.
 - (l) State as well when prompted on should be abbreviation – description e.g. IN - State
 - (5) When citing examples on your prompt page precede them with e.g. and not i.e. For example:
Enter Course Identification e.g. ENGL10600
 - (6) Sort prompt values by date or alphabetically as is appropriate for the data.
 - (7) Academic_Period prompts should be in descending order by Academic_Period field so that the most recent academic period appears first.
 - (8) Academic_Period prompts should make use of the arithmetic function now available. This filter should be \leq current term + three future terms. Example logic that can be pasted into a filter:
 [VALUE] \leq Academic_Current_Period() or
 [VALUE] = Academic_Period_Compare (Academic_Current_Period(), +1) or
 [VALUE] = Academic_Period_Compare (Academic_Current_Period(), +2) or
 [VALUE] = Academic_Period_Compare (Academic_Current_Period(), +3)
 - (9) Campus prompts should be defaulted with *PWL – West Lafayette*
- b)** Multi-select prompts should be displayed in a list box while single-select prompts should be displayed as a drop down list.
- c)** For text box prompts requiring user entry, the heading should be descriptive, and include an example as needed (i.e. Course ID: use capital characters and no spaces).
- d)** Required prompts should always appear with the default indicator (*). If this is not appearing, check the filter and the prompt rules. They should always match.
- (1) If report is a crosstab and there will be an option to include a list format of students that make up the crosstab, this is to be a required prompt and it should default to the 'N' or unselected radio button. *Also see Report Pages 5e*
- e)** Grouping/sorting of prompts
- (1) Group first by required and optional prompts. Separate required prompts from optional prompts with a black line, and if necessary, a highlighted separator message.
 - (2) Then sort by hierarchy (i.e. Academic Period, Campus, College, Major, Minor)
 - (3) Then by type (i.e. text box, value, list). Place multi-select, multi-line text prompts in separate tables for even spacing.

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- f)** If needed, a message about the prompts should be displayed with italic black text and Yellow Walk (#FFD100) background.
3. Cautions
- a)** Ensure that your report is inclusive of all campuses that may be interested in the subject matter. (In the past, reports were often hardcoded to include PWL only.) Prompt pages must include Polytechnic Statewide campuses if data exist.
 - b)** Similarly, ensure that multiple student populations can be viewed in your report. For example, rather than having three separate reports for undergraduates, graduates and professional students, design the report to incorporate all three populations, either with prompts or multiple report pages or tables.

REPORT PAGES

The following section describes the format to be followed when designing a report page. Many of these items are covered in the standard content template. The guidelines are shown here to assist you as you build content of your own or modify an existing standard content report.

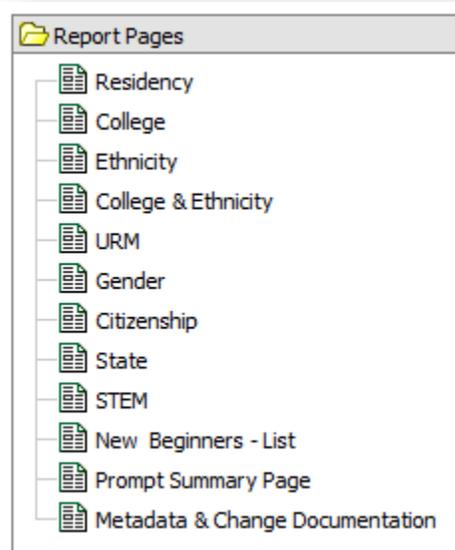
1. Report page guidelines
 - a)** White background
 - b)** Default black font and size
 - c)** Crosstab reports should allow for the option of being accompanied by a list page at the level of the smallest unit of measurement (i.e. student, course, faculty, etc.) unless the default output is set to PDF format. The report author will need to justify when a list does not accompany a crosstab. The list report should be provided as a required prompt (example shown below) to the end user to allow for better performance of the report and mitigate data sharing issues.

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- (2) If using a frozen package and allowing the consumer to select the freeze event in a prompt, include the freeze event parameter in the header.
 - (3) Any optional prompt referring to:
 - (I) Academic Period
 - (II) Campus
 - (III) College
 - (IV) Specific populations (new beginners, transfers, residency, gender, ethnicity, etc.)
 - d)** Optional: additional descriptive information that is needed to correctly interpret data should appear below dynamic prompt parameters in italic black font.
 - e)** Run date and page number aligned left below the title and subtitles.
 - f)** For reports that run directly against live data, include a timestamp next to the run date in the header. (These are the reports that currently reside in the OLTP folder.)
3. Footer: **Do NOT use footers.** This causes issues when running a report to an Excel output.
 4. Report page names



- a)** The maximum length of characters in a page name that renders is 31. This is determined by the maximum number of characters that show on an Excel tab.
- b)** If the report includes both lists and crosstabs, the name should indicate whether the report is a list to mitigate data sharing issues.

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- c) If different populations are being shown on different pages, this should be part of the name as well.
- d) Capitalized, mixed case, population and format separated by space hyphen space (" - ") if both are required.
- e) Limit abbreviations
- f) Examples
 - (1) Two page report containing a crosstab and list referencing the same population: Crosstab, List
 - (2) Similarly formatted pages referencing different populations: Undergraduate, Graduate, Professional
 - (3) Crosstabs and lists referencing multiple populations: Undergraduate - Crosstab, Graduate - Crosstab, Professional - Crosstab, All – List

5. Guidelines for crosstabs

Other Adm Populations	Fall 2013	Total
A - Current or Former Undergrad	1	1
D - Readmit	160	160
EX - Study Abroad Exchange Student	130	130
NH - NonDegree UG in HS	7	7
NS - UG NonDegree Special	34	34
NU - NonDegree Undergraduate	80	80
NX - UG NonDegree Exchange	33	33
R - Reentry	143	143
RP - Reentry Post-baccalaureate	39	39
ST - Transfer Reclass	48	48
T - Transfer	566	566
X - Regional Campus Transfer	88	88
Total	1329	1329

- a) Use default formatting for colors and fonts. Exceptions must be justified by the report author to the governance committee.

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- b)** Use descriptions rather than codes for ease of interpretation by the end user. The report author should use his or her best judgment here. There are times when a code and description are beneficial for the end user (e.g. MAJOR and MAJOR_DESC).
- c)** Ensure columns and row labels are sorted either alphabetically or by date. Sort Academic Period Description by Academic Period to display values in calendar order.
- d)** When a total exists, change the label to "Total". If multiple totals exist, then specify (e.g. Total by College, Total by Major, etc.).
- e)** If crosstab is also accompanied by a list format of the data that makes up the crosstab then a check box prompt must be added to the report for a user to select whether the list also renders when the crosstab is run.

6. Guidelines for lists

Class	College	Major	Program	Registered Ind
03	LA	Political Science	Political Science-BA	Y
07	T	Electrical Engr Technology	Electrical Engr Tech-BS	Y
05	LA	General Undecided	Undecided Liberal Arts	Y

- a)** Use the default formatting for colors and fonts. Exceptions must be justified by the report author to the governance committee.
- b)** Field titles should be capitalized using upper- and lowercase letters with limited use of abbreviations. Abbreviations are acceptable when they are part of the common nomenclature. See appendix for a list of often-used fields and their preferred abbreviations.
 - (1) If exception is given on using an unapproved abbreviation then add abbreviation and spelled out word to Metadata page.
- c)** Grouping: Report authors should use caution when grouping. Take the audience into consideration when using this feature of Cognos. If a field will be filtered on by the end user, grouping is not an ideal solution. Excel Data formatting can help with this issue, but all other formatting will be lost.

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- d) Order of fields: Consider how the report will be used and who the target audience is when selecting the order of fields in a report.
- e) Do not use the concatenated field used for the prompt in the output. If you wish to list both code and description have them occupy their own columns to give the end user greater abilities to pivot or filter the data. (e.g. Major code in one column with major description in the next)
- f) Set Date/Time Stamps to: **Medium** date format. Example Jul 10, 2017
- g) GPA calculations to the hundredths position

PROMPT & REPORT SUMMARY PAGE

The following section describes the information a report author should supply when completing the Prompt & Report Summary Page. The purpose of this page is to help the report author to troubleshoot issues that end users have with reports by displaying essential information about the report and what parameters were selected by the end user before running the report.

SELECTED PROMPT PARAMETERS	
Required Prompts	
Report Type	Sectioned Report - by College and Standing
Academic Period	201510 - Fall 2014
Campus	PWL - West Lafayette
Optional Prompts	
Official Academic Standing	DR - Dropped
Standing Beginning of Term	PB - Probation
College	
Major	
Honors	
REPORT SUMMARY	
Package Used	Student Detail PWL
Cognos Path	Student - PWL]/folder[@name='Registrar']/folder[@name='Development']/folder[@name='Roxanne']/folder[@name='Student Reporting Project - Report Conversions']/report[@name='List of Students by Academic Standing']
Accessibility Enabled	No

1. Selected Prompt Parameters

- a) The report author must describe each required prompt and set up the report expression(s) to display the prompt values the end user chooses.

(1) Required Prompts

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(2) Optional Prompts

b) Note about hardcoded filters—these filters should be listed on the metadata page. They do not need to be on display for the end user.

(1) The report author must list out hard coded filters that are pertinent to the report page results. Not all filters in report need to be listed here just ones that affect results displayed. If a report is only reporting on Undergraduate Students then Student Level = 'UG' would be a pertinent hard coded filter. Custom data items built as filters do not need to be loaded here as they are meaningless without context. Other examples include if a report is only looking at "New Beginners" then that filter should be recorded here and other filters of this nature that detail how the population was arrived at.

2. Package Used: This field will be automatically populated.
3. Cognos Path: This field will be automatically populated.
4. Accessibility Enabled: This field will be automatically populated.

OUTPUT & STANDARD RUN FORMAT

The following section describes the tasks that are required with regard to report output.

1. Output default

a) A default output in Cognos Connection must be selected by the report author.

- (1) HTML
- (2) Excel
- (3) PDF

b) The report author should use best judgment when selecting the run output, considering:

- (1) How the report will be used (i.e. additional filtering, modifications made vs. posting a PDF to a website)
- (2) Who will be using the report

METADATA & CHANGE DOCUMENTATION PAGE

The following section describes the information a report author should supply when completing the Metadata & Change Documentation page of the standard content report. Metadata provides the user with information about the

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content and appropriate use of a given report. It is required for reports in the Standard Content folder and recommended for all other reports.

Report authors are responsible for preparing metadata on reports submitted to the Standard Content folder. Metadata must accompany all Standard Content Reports submitted to the Governance Committee for review. Report authors in other areas should consult their data managers for the approval process in their area. Updated August 2016.

1. **DATA_SOURCE** (New Field)
 - a) Indicate whether this is a Student or Business Report.
 - b) If the report uses data from both Student and Business, select the primary data source.
2. **TITLE** (Formerly BI_CONTENT_NAME)
 - a) Enter the title of the report as it will appear in the Standard Folder.
 - b) Follow naming conventions in the [Guidelines for Standard Cognos Reports](#).
 - c) Titles may have restrictions based on the folder and type of report.
 - d) Examples:
 - (1) Course Enrollment by Academic Period
 - (2) Current Admits
 - (3) Course Grade Rosters
3. **TYPE** (Formerly BI_CONTENT_TYPE)
 - a) Select the Cognos studio (tool) used to build the report.
 - b) Options:
 - (1) Query Studio
 - (2) Report Studio
 - (3) Dashboard
4. **SUBJECT_AREA**
 - a) Indicate the high-level area central to the report.
 - b) Reports may serve multiple areas, but authors must select a primary area for the report.
 - c) Examples:
 - (1) Registration/Enrollment
 - (2) Admissions
 - (3) Financial Aid
 - (4) Accounts Receivable
 - (5) Student Life
 - (6) Other

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5. **LOCATION** (Formerly COGNOS_LOCATION)
 - a) Folder path within Cognos (also known as the 'breadcrumb trail')
 - b) Examples:
 - (1) Student PWL > Standard Content > Registration > Course Enrollment
 - (2) Student PWL > Standard Content > Admissions > New Admits – Undergrad
 - (3) Student PWL > Standard Content > Retention > Graduates
6. **EXECUTIVE_SUMMARY** (Screen Tip)
 - a) Very short description of the report. (One sentence or less.)
 - b) Examples:
 - (1) Course enrollment information
 - (2) List of current admits with contact information
 - (3) List of students by cohort
7. **PURPOSE** (Description field on Cognos report screen)
 - a) Full description of the report. Provide as much information as possible using words and terms that are not confusing or unknown to a standard consumer user.
 - b) Examples:
 - (1) This is a summary report on course enrollment with a drill through to department details. Additional page with list of students is optional. Based on live data; enrollment numbers will change with drop/adds. See frozen data for official enrollment numbers.
 - (2) Report shows demographic and contact information for admitted students. Includes test scores and high school information. Data changes on a daily basis.
 - (3) The user can create a list of students (with emails) in a selected cohort. Information is linked to academic period. Includes students in support programs, ROTC, learning communities, PMO, etc. See the cohort prompt on the prompt page or the Student Cohorts Report for a complete list of cohort options.
8. **CALCULATIONS**
 - a) Describe significant calculations that are tabulated on the report page.
 - b) Examples:
 - (1) Results summed in a crosstab
 - (2) Default calculations are for international students
 - (3) Additional pages calculate results by student demographics
 - (4) Displays highest test score

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- (5) College enrollment summaries only; see Report XYZ for departmental details
- (6) Summary tallies Fall and Spring Semesters for each AY

9. CAUTIONS

- a)** Describe cautionary aspects that a user needs to know when utilizing this report.
- b)** Examples of cautionary information:
 - (1) Data or groups that might be included or missing in the report.
 - (I) Grad and professional students are omitted.
 - (II) Transfer students and transfer credits are included.
 - (III) GPA fields for current term are blank until grades are posted.
 - (IV) Shows only primary instructors.
 - (V) Academic standing is shown for the beginning of the academic period (BOAP).
 - (2) Information that may change or be misinterpreted when report is based on live data.
 - (I) Student contact information may be updated at any time. Make sure you use a current report for contacting students.
 - (II) All Overall GPAs are based on live data and show the current Overall GPA. Report does not show historical Overall GPAs. See frozen data for historical Overall GPAs.
 - (III) Retention data shows student status as of the freeze date.
 - (3) Other reports that might be a better resource.
 - (I) See 'Grad Student Admits' for current grad admitted.
 - (II) This report focuses on student course registration and student demographic data. See 'Course Information Report' for meeting times, locations and full list of instructors.
 - (4) Restrictions for using this data.
 - (a) Data in this report is only available to approved users
 - (b) Report contains SSNs
 - (c) Restricted Access: Contact Disability Resource Center for access to this information.

10. PROMPTS

- a)** List any prompts that are pre-filtered, e.g., where the user may not see all available options.
- b)** Examples:
 - (1) Prompt only shows PWL majors
 - (2) Advisor Prompt shows only primary advisors
 - (3) Current terms shown in Academic Period Prompt, see Report XYZ-FRZ for previous terms

11. HARD_CODED_FILTERS

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- a) Record any significant filters that would be helpful for the user to know and that are not noted elsewhere in the metadata.
- b) The filter content can be described or copied directly from queries/filter text.
- c) Examples:
 - (1) Primary programs only or [PRIMARY_PROGRAM_IND] = 'Y'
 - (2) PWL campus or [Academic Study].[CAMPUS] = 'PWL'
 - (3) Graduate Students or [Admission Application].[Admissions Application].[STUDENT_LEVEL] IN ('U', 'UG')
 - (4) First Generation Students only

12. INTENDED_AUDIENCE

- a) Select the high-level group most likely to use this report.
- b) While individual reports can be used by many groups, select the most likely user group.
- c) Examples:
 - (1) Administrators
 - (2) Colleges/Academic Units
 - (3) Student Life

13. Advisors SEARCH_TERMS (Keywords)

- a) List of up to 20 keywords that can be used to locate the report in searches.
- b) Use keywords that match the Standard Report naming guidelines.
- c) Examples:
 - (1) Admissions
 - (2) Grades
 - (3) Courses
 - (4) Retention

COMMUNICATION & GOVERNANCE

Report authors should contact the governance committee when he or she is prepared to present his or her standard content for review. See the Governance Committee Charter for frequency of meetings and specific operating procedures performed by the governance committee.

The governing body will enforce best practices in the enterprise reporting environment for the Student information reports. The Student Information reporting environment will support informed decision-making by providing well documented metadata on reports, a standard look and feel to all reports, easy to find and organized folder structure and naming convention, and training opportunities for users.

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Governance committee email: StudentReportGov@purdue.edu

APPENDIX: STANDARD DATA DEFINITIONS, FILTERS & TERMINOLOGY

The following section

Fields should match data dictionary definitions if the same name is used.

Data items and filters should contain comments that define the function/purpose.

Examples:

```
#!/* New Beginners */# [Admissions Population] in ('B', 'SB');
```

```
#!/* Full-time & Part-time Logic */# IF (( [Freeze Student].[FRZ_ENROLLMENT_PU].[STUDENT_LEVEL] = 'UG' AND [REPORTING_CAMPUS_CREDITS] >= 12) OR ([Freeze Student].[FRZ_ENROLLMENT_PU].[STUDENT_LEVEL] in ('PR', 'GR') AND [REPORTING_CAMPUS_CREDITS] >= 9)) THEN ('Full-Time') ELSE ('Part-Time')
```

-current term (s)

- o academic period >= 200910 (all banner terms)
- o Academic period >= current term (Admissions/Enrollment current cycle)
- o Registration like R% or A% (Registered students)
- o App type in ('B','SB') (new beginners)
- o Transfer, T, ST
- o Regional Transfer
- o Campus in ('PWL','T%')
- o Admit codes
- o Deny codes
- o College grouping (hoping that the academic school grouping will be complete before this document goes public)
- o STEM majors?
- o Latest major/classification?

APPROVED ABBREVIATIONS			
Admissions (Adms)	Underrepresented Minority (URM)		
Applications (App)	Course Reference Number (CRN)		
Building (Bldg)	Overall GPA		
Department (Dept)	Tech State Wide (TSW)		
Enrollment (Enrl)	Academic CIP grouping (College Grouping)		
Graduate (GR)			
Indicator (Ind)			
Professional (PR)			
Undergraduate (UG)			

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DO NOT ABBREVIATE			
College			
Course			
Enrollment			
Faculty			
Frozen			
Residency			
Resident			
Room			
Section			

EASE OF USE: FOLDER STRUCTURE

This section will be made into a separate document for communications to disseminate once we receive more feedback from the larger community on their thoughts on frozen vs. live terminology, folder structure, etc. We will talk about it briefly at the Cognos user group and give them a link to a survey that is specifically about this issue. The general project feedback link will also be provided in case there are others who wish to provide feedback about other concerns.

- Folder structure outline and thought process.
- Why we made the changes/recommendations that we made.