(GBR) Managing HESA Returns

Understanding HESA Returns

Bundle 52. This chapter is updated for:

- HESA Student Return 2018/19
- Data Futures return

Government-funded academic institutions in the United Kingdom (UK) must submit student related returns of data to HESA. Institutions must submit the returns as an Extensible Markup Language (XML) file that conforms to the HESA schema definition.

A return is composed of various data fields. Specifications for each return and its data fields are available from the HESA website. HESA periodically amends the return specifications.

PeopleSoft Campus Solutions enables you to generate the Student, Aggregate Offshore, and Initial Teacher Training (ITT) returns for the 2008–09 reporting period onwards. In addition, you can generate a Destinations of Leavers from Higher Education (DLHE) return from the 2009–10 reporting period onwards and the Unistats (formerly Key Information Set – KIS) return for 2013–14 onwards.

To generate returns for submission:

1. Select the HESA, UCAS check box on the SA Features page.
2. Select the HESA, UCAS check box on the Academic Institution 6 page to enable the UK-specific regions in the system for an institution.
3. Set up the valid HESA field codes.
4. Enter HESA-specific data into your system.
5. Generate the HESA extract data.
6. Generate the XML file for the returns.
7. Validate the XML file for any schema errors.

Plan how you want the system to derive the return field values. Oracle recommends that you review the return type specification that is available from the HESA website to review the field descriptions, validations, and the valid field values. To understand how the system derives the fields, see Understanding HESA Derivation Steps.

Fields not included in Unistats/KIS

The system includes all the entities and fields for the Unistats/KIS return in the return except for the following:

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- Fields specific to institutions in Wales:
  - Location.ACCOMURLW
  - Location.LOCNAMEW
  - KISCourse.ASSURLW
  - KISCourse.CRSEURLW
  - KISCourse.EMPLOYERURLW
  - KISCourse.LTURLW
  - KISCourse.SUPPORTURLW
  - KISCourse.TITLEW
  - Accreditation.ACCDEPENDURLW
- Field specific to Further Education colleges (FEC): KISCourse.LDCS
- Field specific to 4 joint medical and pharmaceutical schools: HESACourse.JOINTUKPRN

Importing and Mapping HESA Codes

Bundle 52. The import processing is updated for the Student and ITT returns to skip the step that initially inactivates the codes. This prevents code sets from being set to inactive and not activated again when a field is reused in the Data Futures return and the HESA Data Type has been changed for Data Futures.

First, you import HESA field codes into your system. These codes are the valid values that the system can assign to a field in a return. For example, the Student.NATION field has HESA codes such as *DE* for Germany and *AU* for Australia.

To import HESA codes:

1. Place the HESA code list XSD file in a local directory before you access the Import HESA Codes page.
2. Use the Import HESA Codes page to load the HESA codes from the XSD file to your system.

After importing the codes, you can use the Codes page to search and view the imported codes. Also, you can use the Codes page to manually add new codes for fields.

In some cases, you must use the Code Mapping pages to map the HESA codes with the Campus Solutions codes. For example, you must map Campus Solutions marital status codes to the HESA marital status codes. You can delete a mapping by clicking the Delete Row button or inactivate a mapping by clearing the Active check box in all the Code Mapping pages.

On all the Mapping pages, such as the Ethnicity page, the drop-down fields display both the inactive and active Campus Solutions codes. For example, if you use the Ethnic Groups page (Set Up Common Objects >Product Related >Workforce Administration >Ethnic Groups) to set the *ABC* ethnic group as

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inactive, the system continues to display *ABC* as the drop-down value for the Ethnic Group field on the Ethnicity page.

This section discusses how to:

- Import HESA codes.
- Search for the imported HESA codes.
- Map ethnic codes.
- Map campus codes.
- Map marital status codes.
- Map religion codes.
- Map qualification codes.
- Map nationality codes.
- Map fee eligibility codes.
- Map mode of study codes.
- Map classification codes.
- Map disability codes.
- Map module outcome codes.
- Map orientation codes.
- Map title codes.
- Map entry qualifications.

Note: For Aggregate Offshore return, the mapping for campus codes is required. For ITT return, the mappings for ethnicity, nationality, mode of study, and disability codes are required.

Note for Unistats/KIS

Some codes are not provided in Cnn061CodeLists.xsd and you need to manually add them via the Codes page. The codes that you need to manually add are:

- ACCTYPE
- ILRAIMID
- KISAIM

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Pages Used to Import and Map HESA Codes

Page Name	*Definition Name*	*Navigation*	*Usage*
Import HESA Codes	SSR_HE_RUNCNTL	Records and Enrollment > HESA Reporting > Codes and Mappings > Import HESA Codes	Import HESA codes from the XML Schema Definition (XSD) file. The code list XSD file is available from the HESA website.
Codes	SSR_HE_CODES	Records and Enrollment > HESA Reporting > Codes and Mappings > Codes	View the codes that you have imported from the code list XSD file. If required, add new codes for fields.
Ethnicity	SCC_HE_ETHNIC	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Ethnicity	Map Campus Solutions regulatory region and ethnic group codes to the HESA ethnicity codes.
Campus	SSR_HE_CAMPUS	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Campus	Map Campus Solutions campus codes to the HESA campus and Institution's Own Campus codes.
Marital Status	SCC_HE_MARITAL	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Marital Status	Map Campus Solutions marital status codes to the HESA marital status codes.
Religion	SCC_HE_RELIGION	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Religion	Map Campus Solutions religious preference codes to the HESA belief and religion codes.
Qualification	SSR_HE_QUALIFIC	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Qualification	Map Campus Solutions degree codes to the HESA qualification codes.
Nationality	SCC_HE_NATIONALITY	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Nationality	Map Campus Solutions country codes to the HESA nationality codes.
Fee Eligibility	SSR_HE_FEE_ELIG	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Fee Eligibility	Map Campus Solutions residency codes to the HESA fee eligibility codes.
Mode of Study	SSR_HE_MODE_STD	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Mode of Study	Map Campus Solutions academic load codes to the HESA mode of study codes.
Classification	SSR_HE_CLASSIFI	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Classification	Map Campus Solutions honors type and honors codes to the HESA classification codes.

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Page Name	Definition Name	Navigation	Usage
Disability	SCC_HE_DISABILITY	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Disability	Map Campus Solutions type of impairment and support services request codes to the HESA disability codes. Note that the system creates disability records as part of Universities & Colleges Admissions Service (UCAS) processing. For information on how to assign impairment codes to students and specify whether or not support services have been requested, refer to "Identifying Regional Impairment and Support Services" (PeopleSoft Campus Solutions 9.2: Campus Community)
Module Outcome	SSR_HE_MODULE	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Module Outcome	Map Campus Solutions grading scheme, grading basis, grade input, and grade category codes to the HESA module outcome codes.
Gender	SCC_HE_GENDER	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Gender	Map Campus Solutions gender values to HESA gender identifiers.
Orientation	SSR_HE_ORIENT	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Orientation	Map Campus Solutions orientation values to HESA orientation identifiers.
Title Bundle 52. New	SSR_HE_TITLE	Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Title	Map Campus Solutions title values to HESA title identifiers.
Entry Qualification Mapping	SSR_HE_QOE_MAP	Records and Enrollment > HESA Reporting > Codes and Mappings > Entry Qualification Mapping	Map a qualification type to a list of valid grades for that qualification. If grades are not mapped to a particular qualification type, then all the grades are available for a qualification type on the Entry Profile page. If you do this mapping, the Entry Profile page displays only the mapped grades for a type.

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Importing HESA Codes

Access the Import HESA Codes page (Records and Enrollment > HESA Reporting > Codes and Mappings > Import HESA Codes).

Add Attachment

Click to browse to the CodeLists.xsd file that HESA delivers, and click Upload. You can browse your local drive and select a file.

Note: The upload process creates a files subdirectory to store and process the XSD file. This subdirectory is created in the server directory location that is specified in the PS_SERVDIR system parameter in the Application Server/Process Scheduler configuration file psappsrv.cfg/psprcs.cfg. Ensure that PS_SERVDIR is set up with an appropriate value in the configuration file and that users have the correct permission to access the files subdirectory.

XSD File Path

Enter the path and file name of the HESA codes XSD file. You must store this XSD file on an application server that the import process can access.

Warning! For the import process to run properly, the CodeLists.xsd file should not be renamed. The import process uses the CodeLists xsd file name to determine the return type. For example, in C08053CodeLists.xsd, 053 indicates that the file is the xsd for the ITT return. If the file is renamed, the position of substring "053" might be changed or deleted. If it is not present in the filename, then it will not be correctly decoded as the ITT return. In addition, if the institution imports the Codelists for both the ITT and the Student returns, then import the ITT Codelist file first and then import the Student Codelist.

Note that institutions need to handle the deletion of processed files from the application server. Therefore, after using a CodeLists.xsd file, you will need to handle the deletion of this file from the application server.

For Unistats/KIS return, the process imports:

- LEVEL values to the LEVELK field rather than the LEVEL field which is for the Aggregate Offshore return.
- JACS values to the JACSA field rather than the JACS field which is for the DLHE return.

Notes

The import process does not import codes for fields that are not required by the system, for example EMPFEES. The log file for the process includes messages for codes that are not imported.

When there are multiple fields with the same HESA data type, the process will create the codes for each of the fields. For example, when importing codes for MOBTYPE, the process imports the same codes and descriptions for MOBTYPE2 and MOBTYPE3.

The codes for some fields in the ITT return are either identical to, or a subset of, the codes in the Student return. For such fields, the process does not import the codes for the ITT return. The process does not import the following codes for an ITT code list (Cnn053CodeLists.xsd):

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- DISABLE
- DISALL
- ENTRYRTE
- ETHNIC
- FUNDCODE
- ITTPHSC
- ITTSCHMS
- MODE
- MSTUFEE
- PGCECLSS
- PGCESBJ
- RSNEND
- SBJCA
- SEXID
- TTCID
- UNITLGTH

From a Unistats/KIS code list file (Cnn061CodeLists.xsd), codes for this field are not imported: TTCID (same codes as Student return).

If any of the codes that the process does not import for ITT or Unistats/KIS are required by your institution before the code list for the Student return is imported, then you can add such codes manually through the Codes page.

Searching for the Imported HESA Codes

Access the Codes search page (Records and Enrollment > HESA Reporting > Codes and Mappings > Codes).

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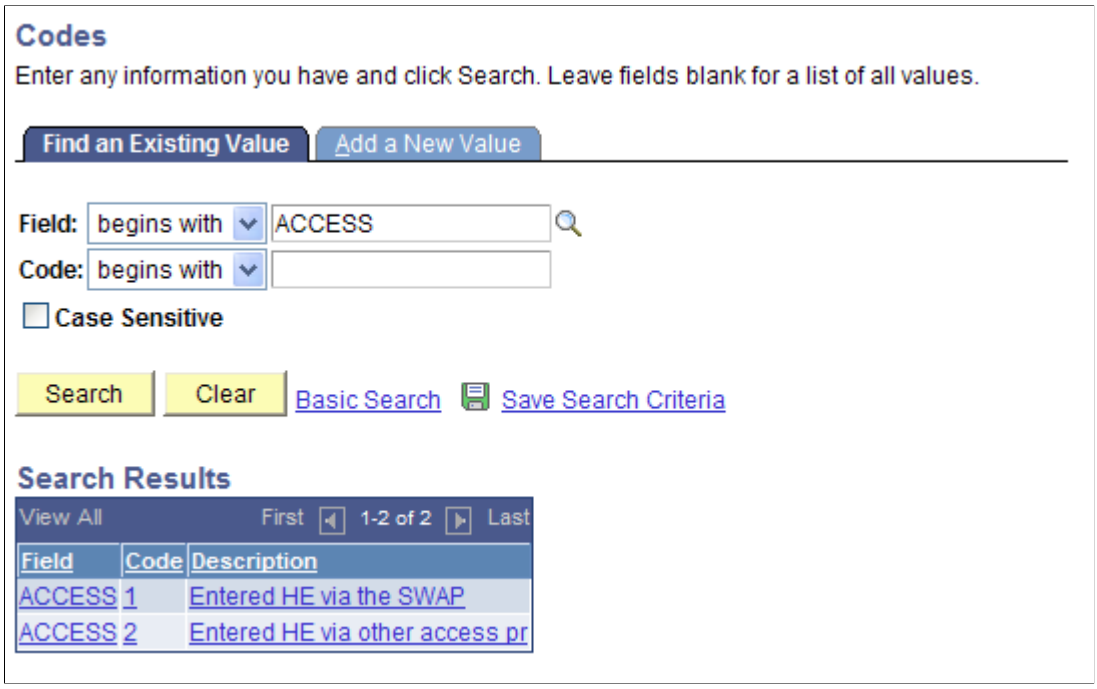
Image: Codes search page

This example illustrates the fields and controls on the Codes search page. You can find definitions for the fields and controls later on this page.

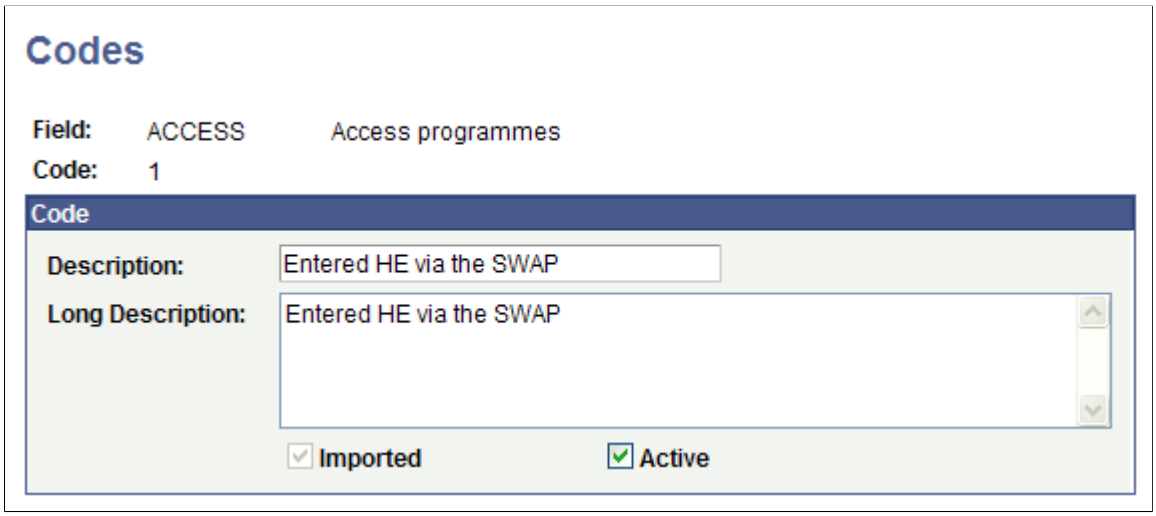


Use the Codes search page to search for all the codes of a specific field. If required, click the Add a New Value link to manually add a code for a field.

Click the Add a New Value link or click a link in the Search Results group box to access the Codes page.

Image: Codes page

This example illustrates the fields and controls on the Codes page. You can find definitions for the fields and controls later on this page.



The text in the Description field can accept a maximum of 30 characters. Note that when you select a code on a data capture page, the page displays the text from the Description field. If the Import HESA Codes Application Engine (SSR_HE_IMPCD) process has cut a description text that extends beyond

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30 characters, you can modify the description text so that a meaningful description appears on the data capture pages.

The "Setting Up and Entering Data for HESA Reporting" section discusses the data capture pages.

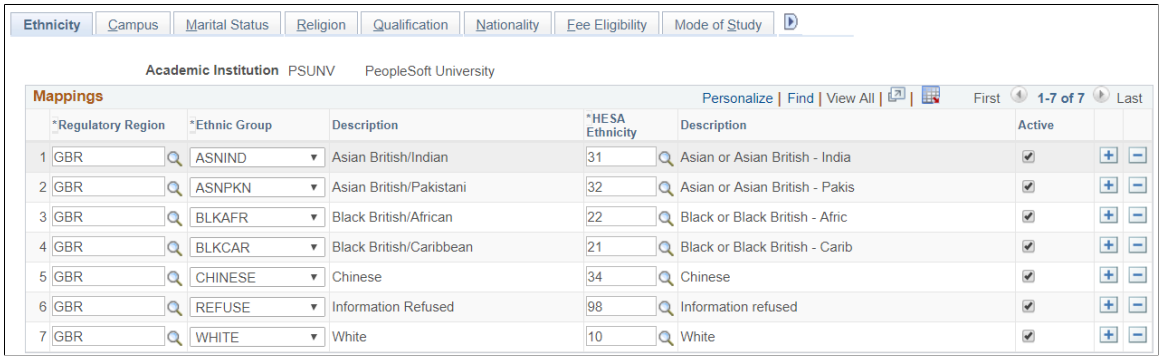
Mapping Ethnic Codes

Bundle 52. Description field for Regulatory Region has been removed.

Access the Ethnicity page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Ethnicity).

Image: Ethnicity page

This example illustrates the fields and controls on the Ethnicity page. You can find definitions for the fields and controls later on this page.



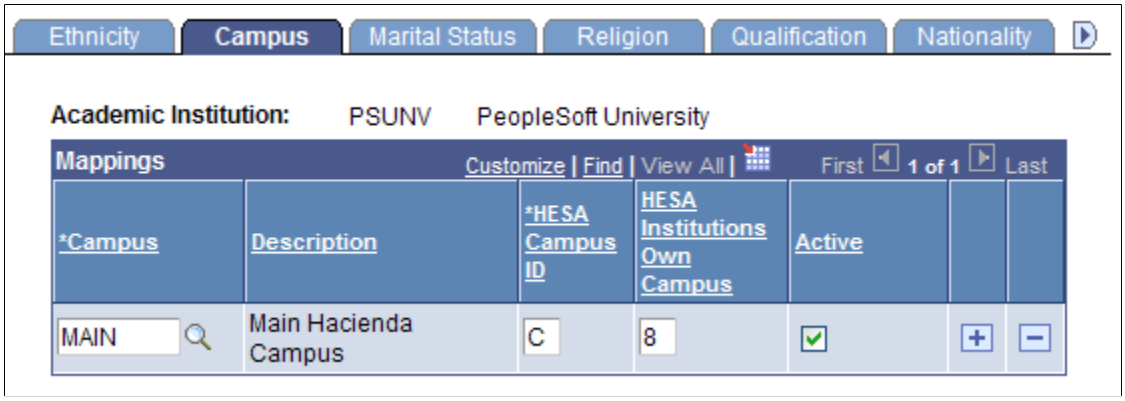
Map Campus Solutions regulatory region and ethnic group codes to the HESA ethnicity codes. The system uses this mapping to derive the Student.ETHNIC field values (for both Student and ITT returns).

Mapping Campus Codes

Access the Campus page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Campus).

Image: Campus page

This example illustrates the fields and controls on the Campus page. You can find definitions for the fields and controls later on this page.



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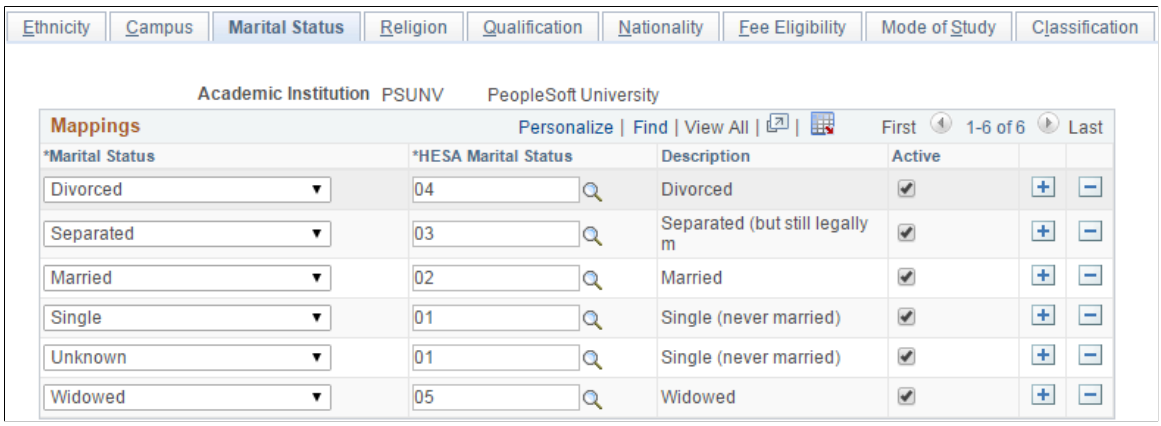
Map the Campus Solutions campus codes to the HESA Campus ID and HESA Institutions Own Campus codes. The system uses this mapping to derive the Instance.CAMPID, Instance.INSTCAMP, and Provision.INSTCAMP field values.

Mapping Marital Status Codes

Access the Marital Status page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Marital Status).

Image: Marital Status page

This example illustrates the fields and controls on the Marital Status page. You can find definitions for the fields and controls later on this page.



Map the Campus Solutions marital status codes to the HESA marital status codes. The system uses this mapping to derive the EntryProfile.MARSTAT field value.

Mapping Religion Codes

Access the Religion page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Religion).

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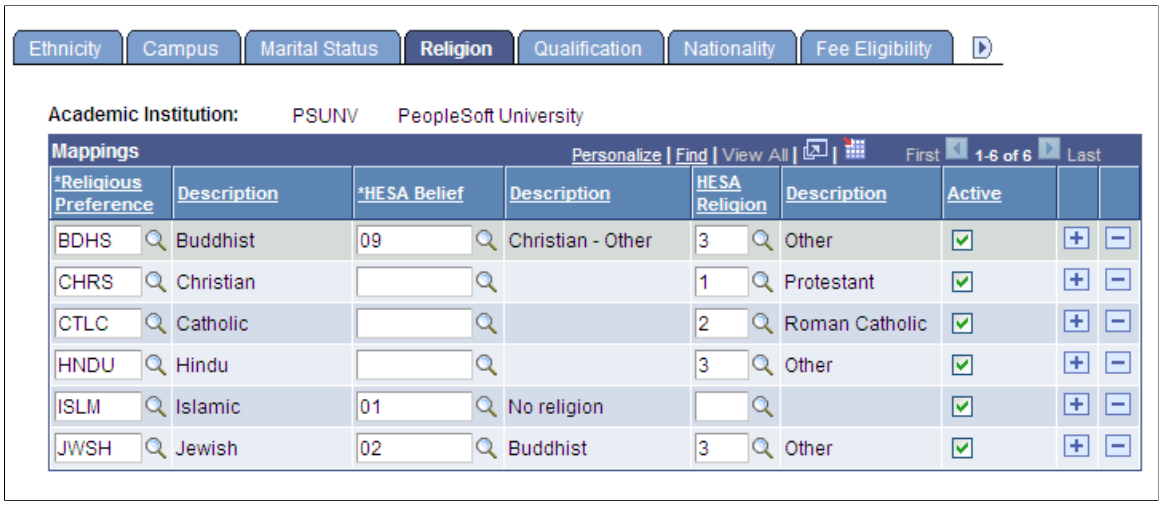
Image: Religion page

This example illustrates the fields and controls on the Religion page . You can find definitions for the fields and controls later on this page.



Map the Campus Solutions religious preference codes to the HESA belief and religion codes. The system uses this mapping to derive the Student.RELBLF and EntryProfile.RELIGION field values.

Mapping Qualification Codes

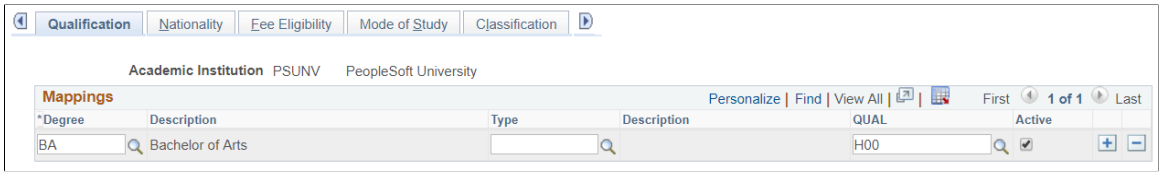
Bundle 52.

- The mapping is updated to add QUALTYPEID to allow values to be derived for Entry Qualification Award entities that are derived from External Degrees.
- New field: Type. This is used to derive EntryQualificationAward.QUALTYPEID.
- HESA Qualification column was renamed to QUAL.

Access the Qualification page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Qualification).

Image: Qualification page

This example illustrates the fields and controls on the Qualification page. You can find definitions for the fields and controls later on this page.



The system uses this mapping to derive the Entry Qualification Award entities from External Degrees.

Mapping Nationality Codes

Access the Nationality page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Nationality).

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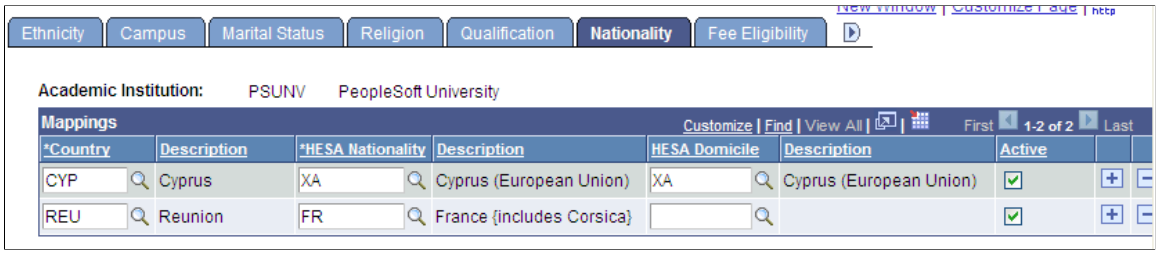
Image: Nationality page

This example illustrates the fields and controls on the Nationality page . You can find definitions for the fields and controls later on this page.



Map the Campus Solutions country codes to the HESA nationality codes. The system uses this mapping to derive the Student return's Student.NATION and EntryProfile.DOMICILE field values and ITT return's Student.DEGCTRY field value.

You map only certain Campus Solutions country codes to the HESA codes for Nationality. In most cases, the system can use the two-character Campus Solutions country code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL).

HESA Nationality

Enter a value only if the two-character Campus Solutions country code is not a valid value for Student.NATION and Student.DEGCTRY. For example, the French territory of Reunion Island has its own country code *RE* but the academic institution must report the value as France *FR* in Student. NATION and Student.DEGCTRY.

If you do not select a value, the system uses the default two-character country code.

HESA Domicile

Enter a value only if the two-character Campus Solutions country code is not a valid value for EntryProfile.DOMICILE. If you do not select a value, the system uses the default two-character country code.

In the above exhibit example, the institution has mapped both Nationality and Domicile to *XA* for Cyprus. Therefore, if a student's record in Campus Solutions has a country code of *CYP,* the system uses the *XA* value for Student.NATION and Student.DEGCTRY, and uses the same value *XA* for EntryProfile.DOMICILE. Also, in the second row of the exhibit example, the setup indicates that if the student's record in Campus Solutions has a country code of *REU* (Reunion Island), then the system uses the value of *FR* for Student.NATION and Student.DEGCTRY. In such a case, because the HESA Domicile field has been left blank, the system uses the default two-character country code of *RE* for reporting EntryProfile.DOMICILE of the student.

See Nationality (NATION)

SeeDomicile (DOMICILE)

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Mapping Fee Eligibility Codes

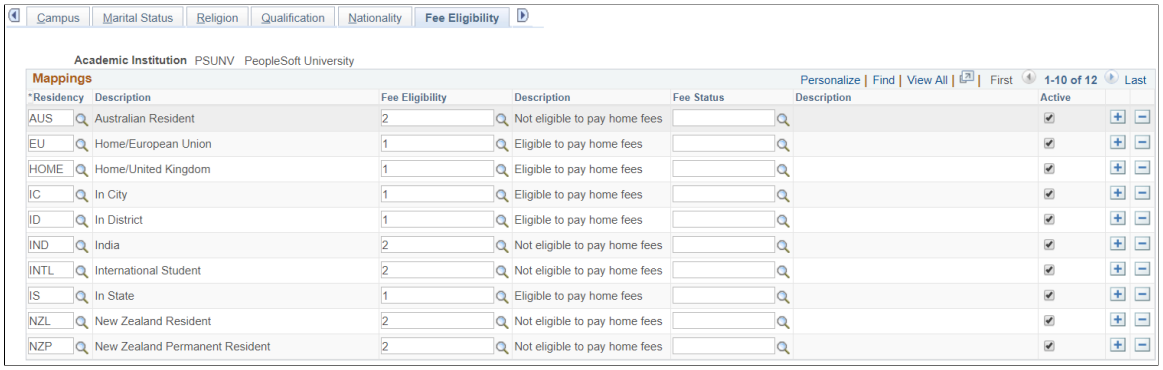
Bundle 52.

- HESA FEE Eligibility has been renamed to Fee Eligibility; this field is now optional.
- Added mapping to Fee Status

Access the Fee Eligibility page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Fee Eligibility).

Image: Fee Eligibility page

This example illustrates the fields and controls on the Fee Eligibility page. You can find definitions for the fields and controls later on this page.



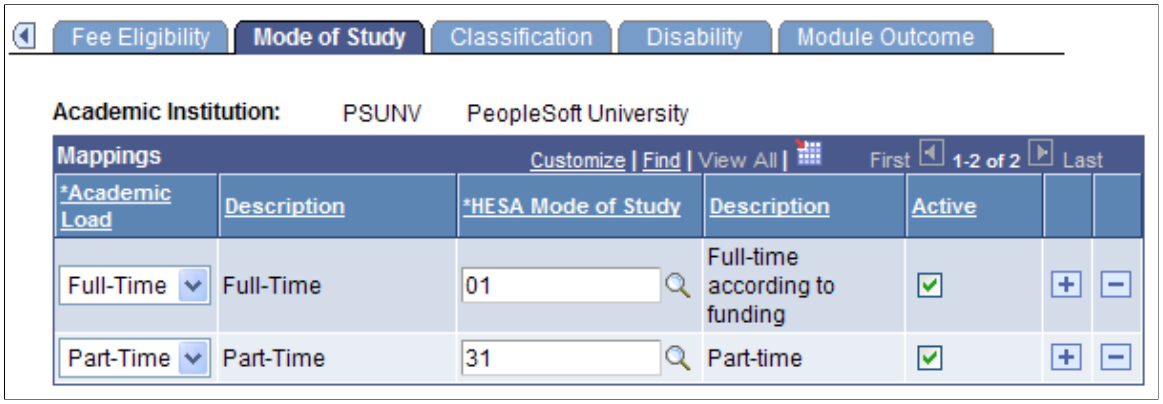
Map Campus Solutions residency codes to the HESA fee eligibility codes. The system uses this mapping to derive the Instance.FEEELIG field value.

Mapping Mode of Study Codes

Access the Mode of Study page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Mode of Study).

Image: Mode of Study page

This example illustrates the fields and controls on the Mode of Study page. You can find definitions for the fields and controls later on this page.



Map the Campus Solutions academic load codes to the HESA mode of study codes. The system uses this mapping to derive the Student return's Instance.MODE and ITT return's Student.MODE field values.

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Mapping Classification Codes

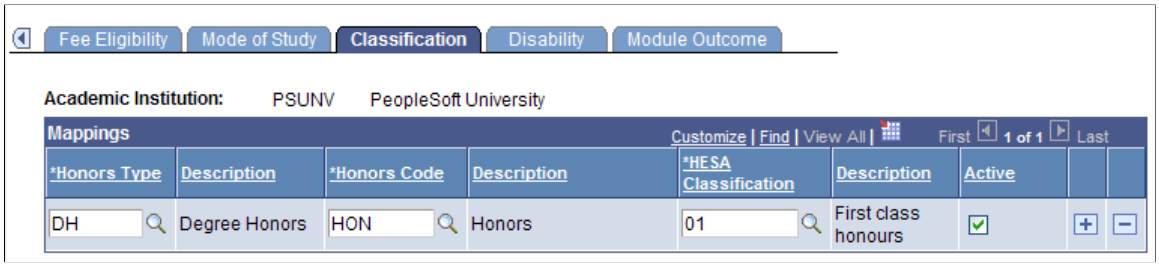
Bundle 52.

- The existing mapping is updated to add QUALRESULT for the Qualification Awarded entity.
- HESA Classification column is renamed to CLASS.

Access the Classification page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Classification).

Image: Classification page

This example illustrates the fields and controls on the Classification page. You can find definitions for the fields and controls later on this page.



Map the Campus Solutions honors code and type codes to the HESA classification codes. The system uses this mapping to derive the QualificationAwarded.QUALRESULT field value.

Mapping Disability Codes

Access the Disability page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Disability).

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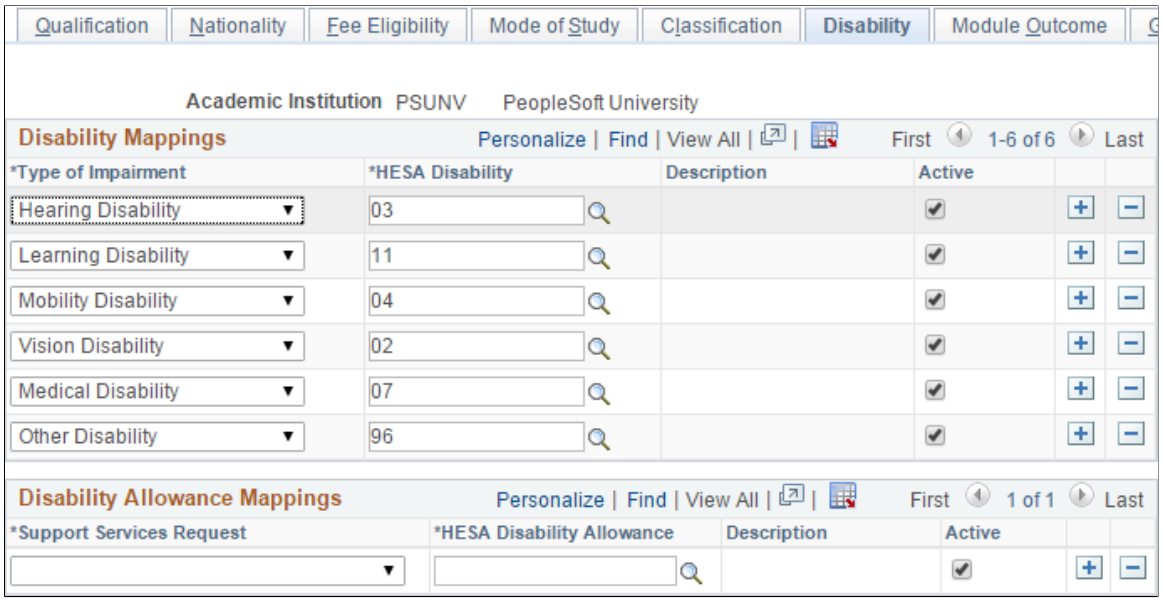
Image: Disability page

This example illustrates the fields and controls on the Disability page. You can find definitions for the fields and controls later on this page.



Disability Mappings

Use this region to map the Campus Solutions type of Impairment codes to the HESA disability codes. The system uses this mapping to derive the Student.DISABLE field value (for both Student and ITT returns).

Disability Allowance Mappings

Use this region to map the Campus Solutions support services request codes to the HESA disability allowance codes. The system uses this mapping to derive the DISALL field value (for both Student and ITT returns).

Mapping Module Outcome Codes

Bundle 52.

- Updated to add mappings to MODULEOUTCOME and MODULERESULT for the Module Outcome entity. MODULEOUTCOME has a different code set to MODOUT.
- New fields: Outcome, Result
- HESA Module Outcome column has been renamed to MODOUT

Access the Module Outcome page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Module Outcome).

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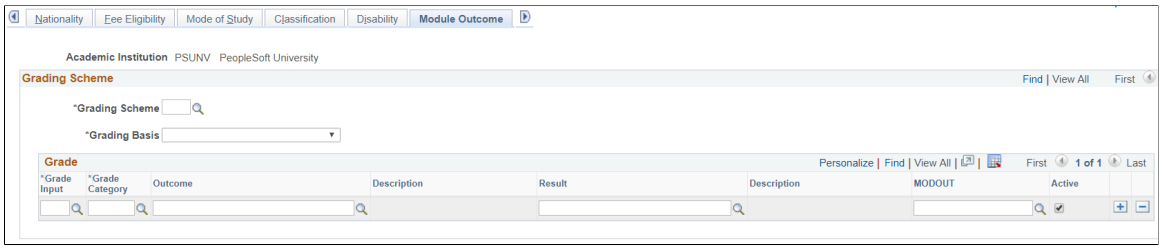
Image: Module Outcome page

This example illustrates the fields and controls on the Module Outcome page. You can find definitions for the fields and controls later on this page.



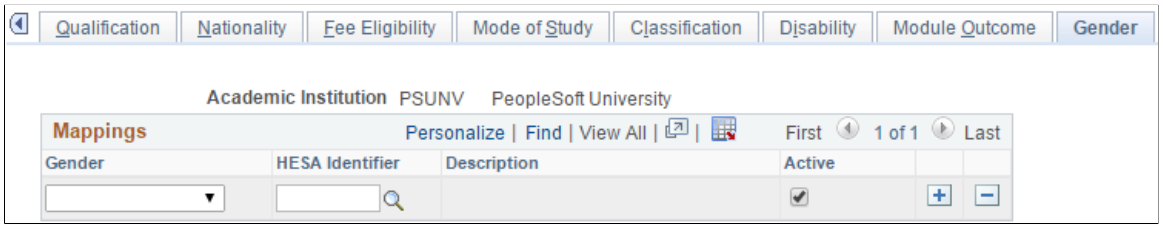
Map the Campus Solutions grade input and grade category codes to the HESA module outcome codes. The system uses this mapping to derive the Student On Module.MODOUT field value.

Mapping Gender Codes

Access the Gender page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Gender).

Image: Gender page

This example illustrates the fields and controls on the Gender page. You can find definitions for the fields and controls later on this page.



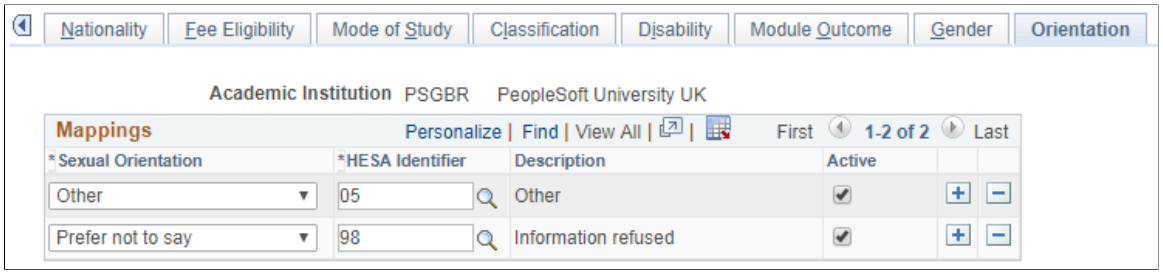
The system uses this mapping to derive the Student.SEXID field values for the Student and ITT returns.

Mapping Orientation Codes

Access the Orientation page (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Orientation).

Image: Orientation page

This example illustrates the fields and controls on the Orientation page. You can find definitions for the fields and controls later on this page.



The system uses this mapping to derive the Student.SEXORT field values for the Student and ITT returns.

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Note: This page is available only in Campus Solutions 9.2 and is used to derive values from the Person Biographic record.

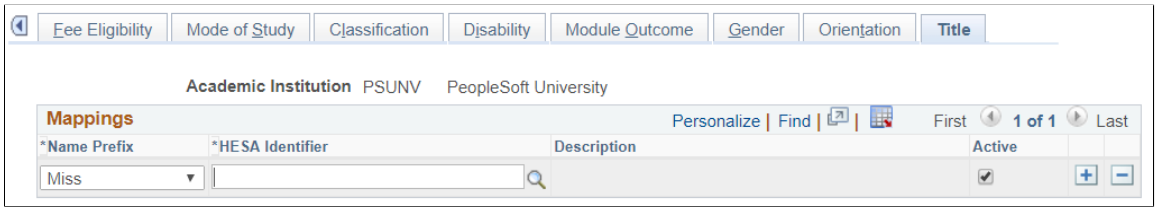
Mapping Title Codes

Bundle 52. New

Access the Title page (Records and Enrollment > HESA Reporting > Codes and Mappings > Title).

Image: Title page

This example illustrates the fields and controls on the Title page. You can find definitions for the fields and controls later on this page.



The system uses this mapping to derive the Student.TITLEID field values from the Name Prefix table.

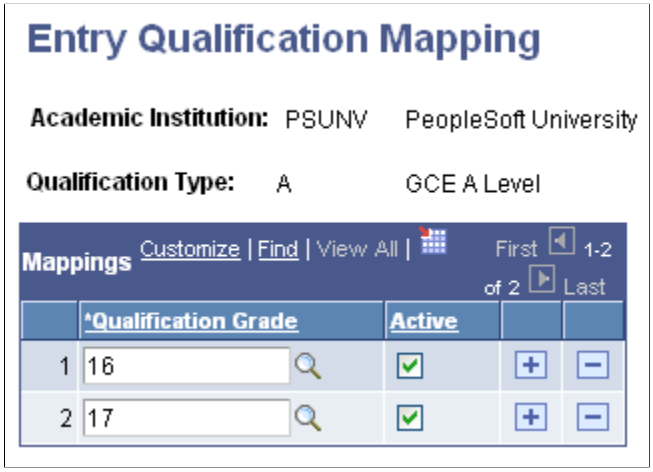
Name Prefix This value must be unique for your institution.

Mapping Entry Qualification

Access the Entry Qualification Mapping page (Records and Enrollment > HESA Reporting > Codes and Mappings > Entry Qualification Mapping).

Image: Entry Qualification Mapping page

This example illustrates the fields and controls on the Entry Qualification Mapping page. You can find definitions for the fields and controls later on this page.



An institution can only return specific Grades (QUALGRADE) for a Qualification Type to HESA. If an invalid Grade is returned, then validation errors will occur at HESA. Use the Entry Qualification Mapping page to define which Grade values are appropriate for a particular Qualification Type. The system then

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uses this mapping to ensure that only valid Grade values are entered for the selected Qualification Type on the Entry Profile page. The Import Applicant Data process also uses this mapping when importing ivStarJ records to report invalid grade values.

Setting Up a HESA Return

Bundle 52.

On the Entities page, a new field is added: Type.

This section discusses how to:

- Set up a HESA return.
- Set up HESA fields.
- Set up HESA types.
- Set up HESA action reasons.
- Configure HESA.
- Generating student identifiers (SIDs or HUSIDs) during registration or enrollment.

Pages Used to Set Up a HESA Return

Page Name	***Definition Name***	***Navigation***	***Usage***
Reporting Periods	SSR_HE_REP_PERIODS	Records and Enrollment > HESA Reporting > HESA Returns Setup > Reporting Periods	View or create a reporting period. Reporting periods from 2000 onwards are delivered with your system.
Returns	SSR_HE_RETURNS	Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns	View or create a return type. The STUDENT, OFFSHORE, DLHE, GRADOUT, Unistats/KIS, Data Futures, and ITT return types are delivered with your system.
Entities	SSR_HE_ENTITIES	Records and Enrollment > HESA Reporting > HESA Returns Setup > Entities	View or create an entity for a return type. The entities for Student, Offshore, DLHE, GRADOUT, Unistats/KIS, Data Futures, and ITT returns are delivered with your system.
Fields	SSR_HE_FIELDS	Records and Enrollment > HESA Reporting > HESA Returns Setup > Fields	View or create return fields. For Student, Offshore, DLHE, GRADOUT, Unistats/KIS, Data Futures, and ITT returns, the HESA fields are delivered with your system.

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Page Name	*Definition Name*	*Navigation*	*Usage*
HESA Returns	SSR_HE_HESA_RETURN	Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Returns	Create a return for a reporting period. To create a return, you can copy return setup data (such as the return fields) from another return you previously created.
HESA Fields	SSR_HE_HESA_FIELDS	Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Fields	Add, edit, or view HESA fields in a return. If required, specify default and constant values for the HESA return fields.
HESA Types	SSR_HE_HESA_TYPES	Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Types	For the Student return, map HESA fields to the Campus Solutions name, address and external ID types. The system uses this mapping to derive HESA return field values. Also, define the program statuses that the system uses to determine which Instances records to include in the return.
HESA Action Reasons	SSR_HE_HESA_ACTN	Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Action Reasons	For the Student return, map HESA field codes to the Campus Solutions Program Action and Action Reason values. The system uses this mapping to derive HESA return field values.
HESA Configuration	SSR_HE_CONFIG	Records and Enrollment > HESA Reporting > HESA Returns Setup > Configuration > HESA Configuration	Configure the system for Create Extract and Create HUSID processing. Control validation for DLHE survey.
Create Student Identifiers	SSR_HE_CRTHUSID	Records and Enrollment > HESA Reporting > HESA Returns Setup > Create Student Identifiers	Create SID or HUSID for students during the registration or enrollment period.

Setting Up a HESA Return

Access the HESA Returns page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Returns).

When adding a new return, you have to enter an academic institution and a return name. You must enter a unique return name for an academic institution.

Note: To test the Create Extract Application Engine (SSR_HE_DATA) process, you can define multiple returns for the same institution, return type, and reporting period.

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Note: For the Data Futures return, the field derivation logic uses the Rules Engine. Rules are delivered for each field, and to activate the rules for the return you must run the Build Rules process for HESA DF Field Derivation Rules and HESA Derivation Steps Rule Categories. Make sure you have the appropriate security access to both categories. To run the process, go to Set Up SACR >System Administration >Rules Engine >Setup >Build Rules.

When you access the HESA Returns page in add mode, the Copy Return Setup Data From group box appears.

To create a return using the Copy Return Setup Data From group box:

1. Select a previously defined return name from which you want to copy the setup data.
2. Select a reporting period for which you want to create the return.
3. Click Copy.

The other tabs in the page appear when you copy a return or click the Skip Copy button. If you want to manually create a return, if you are creating a return for the first time, or if no appropriate records are available to copy from, click the Skip Copy button.

The Create Fields button is available only when you click the Skip Copy button.

After selecting a return type, you can click the Create Fields button to have the system automatically create all the entities and the associated fields for the return. The system displays the created fields on the HESA Fields page.

Return Type

Select any one of the following: *STUDENT, OFFSHORE, DLHE, GRADOUT*, *ITT* or *KIS (Unistats)*.

You can also select a return type that you have defined in the Returns page.

Note: The system displays the HESA Types tab only for the Student and ITT returns.
The system displays the HESA Action Reasons tab only for the Student, ITT and DLHE returns.

Reporting Period

Select the reporting period for which you want to create the return.

Country

Select a country code that the system uses to determine which fields to include in the return. Values for this field are delivered with your system as translate values. Values are *England, Northern Ireland, Scotland,* and *Wales.* This field is not applicable for the Aggregate Offshore return.

INSTAPP

Enter a value that you want the system to return in the Institution.INSTAPP field of the return. This field is not applicable for the Aggregate Offshore, DLHE, GRADOUT, Unistats/KIS and ITT, and Data Futures returns.

Specification Code

Enter the code you want to use to set the specification attribute in the XML. For example, enter *HDPStudent1*. This value is

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required for Data Futures return. This field is hidden for other return types.

Version Number Enter the number you want to use to set the specification version number attribute in the XML. For example, enter *1.6.0*. This value is required for Data Futures return. This field is hidden for other return types.

Enable Sub-Plan Reporting Select if you want to enter the reporting data in the Sub-Plan HESA and the Sub-Plan Offering/Year HESA pages. Selecting this check box enables the system to use the entered subplan level data to generate the HESA return.

This is not enabled for Graduate Outcomes (GRADOUT) return.

Include FE (Include further education) Select to have the system derive fields relevant to further education (FE) students. This check box is not applicable for the Aggregate Offshore, DLHE, and GRADOUT returns.

Active Clear this check box if you want to prevent old test returns from being displayed in the search results.

For more information about the HUSID, INSTAPP, and UKPRN fields, refer to the HESA Student Record specification available from the HESA website. Specification for the HUSID digit structure can also be found on the HESA website.

Program Statuses

Select program statuses that the system can use for creating Instance entities.

See Student Record Return: Instance Entity

See ITT Return: Student Entity

Survey Details

The system enables the Survey Details region when you select the DLHE return type. Use this region to define the details of the two surveys (April and January) for each DLHE reporting period.

Survey For DLHE, select the survey translate values: *1* for the April survey or *2* for the January survey.

For Graduate Outcomes, select the survey translate values:

- *A* for December.
- *B* for March.
- *C* for June.
- *D* for September.

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Note: Because the CENSUS value is returned at the Provider rather than the Graduate level, it is expected that separate returns are defined for each of the survey populations. This allows the extracted data to be retained and not overwritten when the extract is run for a subsequent survey. The setup also allows a single return to be defined for multiple surveys where an institution does not want to retain the extract data.

Qualifying Start Date

- For DLHE, select the start date to be used when identifying students who qualify for the survey. If the Survey value is April, the value defaults to the reporting period start date. If the Survey value is January, the value defaults to 01-JAN-YYYY where the year value is the year value of the reporting period end date.
- For Graduate Outcomes, students who belong to cohort:
  - A, the value defaults to 01-AUG-YYYY, where the year value is the record year.
  - B, the value defaults to 01-NOV-YYYY, where the year value is the record year.
  - C, the value defaults to 01-FEB-YYYY, where the year value is the record year plus 1.
  - D, the value defaults to 01-MAY-YYYY, where the year value is the record year plus 1.

Qualifying End Date

- For DLHE, select the end date to be used when identifying students who qualify for the survey. If the Survey value is April, the value defaults to 31-Dec-YYYY, where the YYYY value is the year of the reporting period start date. If the Survey value is January, the value defaults to the reporting period end date.
- For Graduate Outcomes, students who belong to cohort:
  - A, the value defaults to 31-OCT-YYYY, where the year value is the record year.
  - B, the value defaults to 31-JAN-YYYY, where the year value is the record year plus 1.
  - C, the value defaults to 30-APR-YYYY, where the year value is the record year plus 1.
  - D, the value defaults to 31-JUL-YYYY, where the year value is the record year plus 1.

Census Date

Select the census date for the survey. This system also displays the date to the student on the Survey questionnaire

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For Graduate Outcomes, this field is optional.

Survey Start Date Select the date when the survey is available for completion by the student.

For Graduate Outcomes, this field is optional. But if you define a start date, then you must also define an end date.

Survey End Date Select the date when the survey is no longer available for completion by the student.

For Graduate Outcomes, this field is optional.

Survey Statuses

The system enables the Survey Statuses region when you select the DLHE and GRADOUT return type. Use this region to define which surveys, based on the survey status, should be included by the Create Extract process.

Note: Unless other survey status values are set in Survey Management that should be included in the extract, you should define only *New* for a GRADOUT return.

Survey Status Select the translate values of the statuses to be included in the HESA extract.

Account Types

The system enables the Account Types region when you select the Student return type. Use this region to specify the account types that your institution uses for tuition and waiver charges. The system uses the values that you enter in this region to derive Instance.GROSSFEE and Instance.NETFEE.

Research Options

This region appears only when the Return Type is STUDENT.

Primary Advisor Only By default, this check box is not selected.

Use this check box to determine which student advisor records are used to create REF Data entities.

Primary Supervisor Only By default, this check box is not selected.

Use this check box to determine which supervisor records are used to create REF Data entities.

Advisor Roles Select the advisor role.

Supervisor Roles Optional. Use this field to define one or more roles to determine which supervisor records are used to create REF Data entities.

If you do not define a role, supervisor records with any role value will be considered.

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Supervisor Statuses Use the Status field to define one ore more status values to determine which supervisor records are used to create REF Data entities.

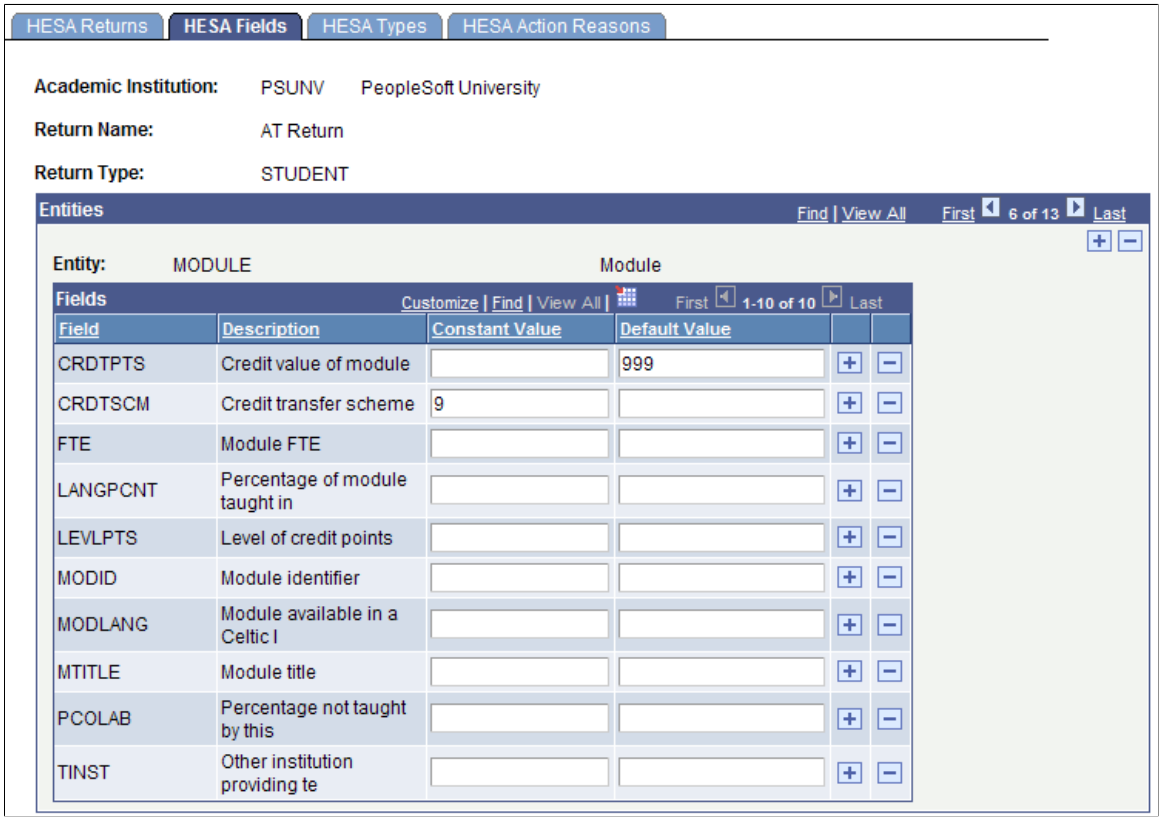
See Student Record Return: REF Data Entity.

Setting Up HESA Fields

Access the HESA Fields page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Fields).

Image: HESA Fields page

This example illustrates the fields and controls on the HESA Fields page. You can find definitions for the fields and controls later on this page.



Use a field constant when your institution wants to return the same value for an entity. For example, if you want the system to derive the Credit transfer scheme as No Scheme for all modules in the Student return 2008/09, set the Module.CRDTSCM constant value to *9*.

Use the field default to reduce the amount of data entry by defining a default value to be used when no value is derived for a mandatory field. For example, if a default value of 999 is defined for the Module.CRDTPTS field, and no data is found for a module, then *999* is used.

Note that you must enter the value *NULL* if you want to define a null constant or default.

Note: The Constant Value field or the Default Value field can accept a maximum of 30 characters. Therefore, the system does not use these two fields in the derivation of the Unistats/KIS fields that exceed 30 characters (for example, the URL fields).

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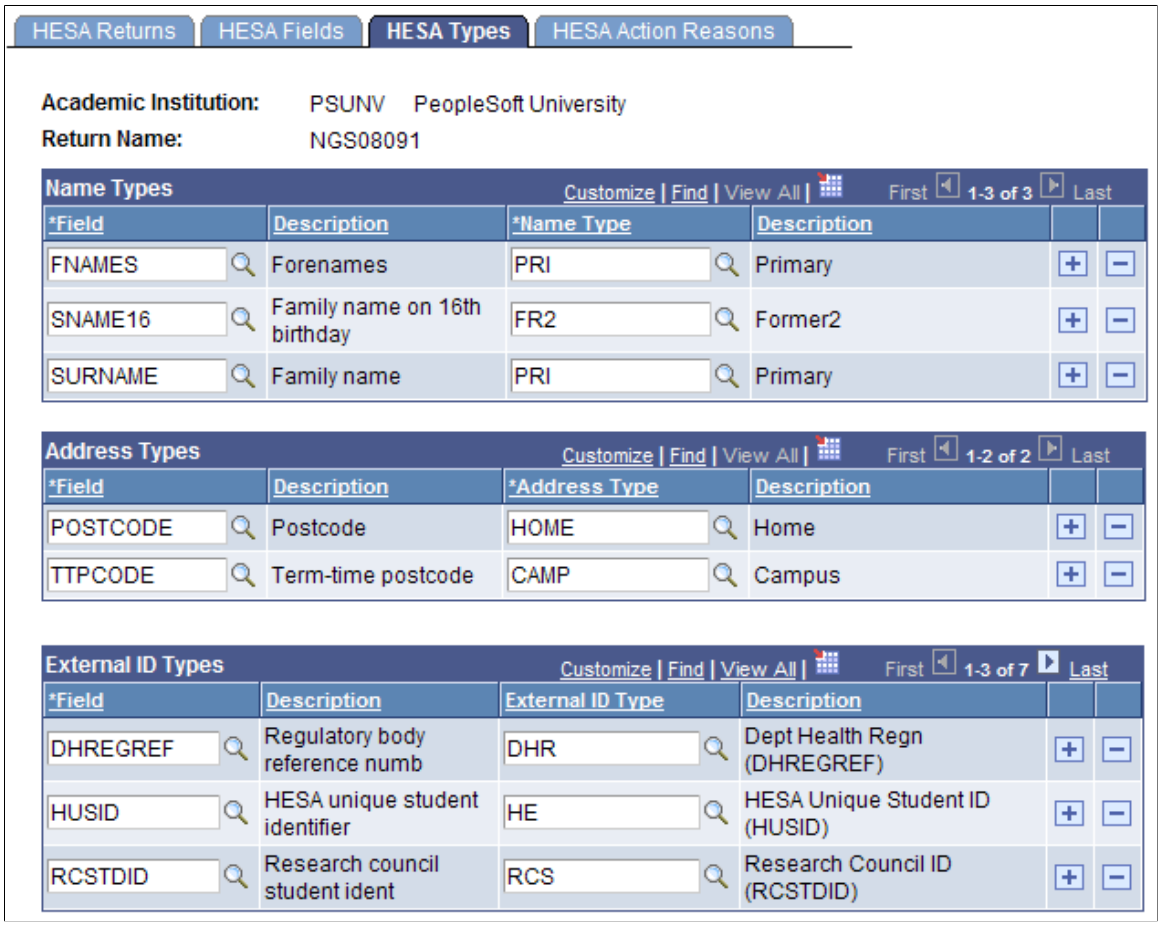
Note: For Unistats/KIS: The LEVELK field has K appended to distinguish it from the LEVEL field in the Aggregate Offshore return. The TITLEK field has K appended to distinguish it from the TITLE field in the ITT return. JACSA, JACSB and JACSC fields have A, B and C appended to allow three values to be returned and to distinguish the fields from the JACS field in the DLHE return.

Setting Up HESA Types

Access the HESA Types page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Types).

Image: HESA Types page

This example illustrates the fields and controls on the HESA Types page. You can find definitions for the fields and controls later on this page.



Name Types

Bundle 52. For Data Futures return, this region is re-used for Student.SNAME16.

The system uses the Name Types mapping to derive Student.SNAME16 for ITT, Data Futures, and Student returns.

This region does not appear for Graduate Outcomes return. Name details are derived from Primary name records as per Student return.

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Address Types

The system uses the Address Types mapping to derive the following fields:

- EntryProfile.POSTCODE
- Student.TTPCODE

For Graduate Outcomes, only the COUNTRY field is available. Users can define one or more address types that are considered when deriving the COUNTRY field and the Postal Address entity. If users do not define a type, all active address are considered during derivation.

Note: The Address Types region is not applicable for the ITT return.

Contact Address Types

Use this region to define one or more address types for the Data Futures return. The system uses the Contact Address Type to derive ContactPurpose.CONTACTTYPEID.

Contact Type	Select either: • 01 — Permanent home address • 02 — Term time address

External ID Types

The system uses the External ID Types mapping to derive the following fields for the Student return:

- Instance.DHREGREF
- Student.HUSID
- Instance.RCSTDID
- Student.SCN
- Instance.TREFNO
- Student.UCASPERID
- Student.ULN

The system uses the External ID Types mapping to derive the following fields for the ITT return:

- Student.HUSID
- Student ISANUM
- Student.NIN
- Student.SKILLTEST
- Student.TREFNO
- Student.ULN

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For information about defining external systems and entering external system IDs for a person or an organization, see:

- "Defining External Systems" (PeopleSoft Campus Solutions 9.2: Campus Community)
- "Entering External System IDs" (PeopleSoft Campus Solutions 9.2: Campus Community)

Contact Email Types

Use this region to define one or more email types for Data Futures return EMAIL field.

Email Types

Use this region to define one or more email types for the Graduate Outcomes return EMAIL field. If you do not define a type, all emails are considered during derivation. The system uses Email Types to derive the following fields for Graduate Outcomes return:

- GRADUATE.EMAIL
- GRADUATE.EMAIL2
- GRADUATE.EMAIL3

Person ID Type

Use this region to define one or more ID types for the Data Futures return. The system uses the Person ID Type to derive PersonIdentifier.IDTYPECODE.

Phone Types

Use this region to define one or more phone types for the Graduate Outcomes return INTTEL, UKMOB, and UKTEL fields. If you do not define a type, all phone numbers are considered during derivation. The system uses Phone Types to derive the following fields for Graduate Outcomes return:

- GRADUATE.INTTEL
- GRADUATE.INTTEL2
- GRADUATE.INTTEL3
- GRADUATE.UKMOB
- GRADUATE.UKMOB2
- GRADUATE.UKMOB3
- GRADUATE.UKTEL
- GRADUATE.UKTEL2
- GRADUATE.UKTEL3

Setting Up HESA Action Reasons

Access the HESA Action Reasons page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Action Reasons).

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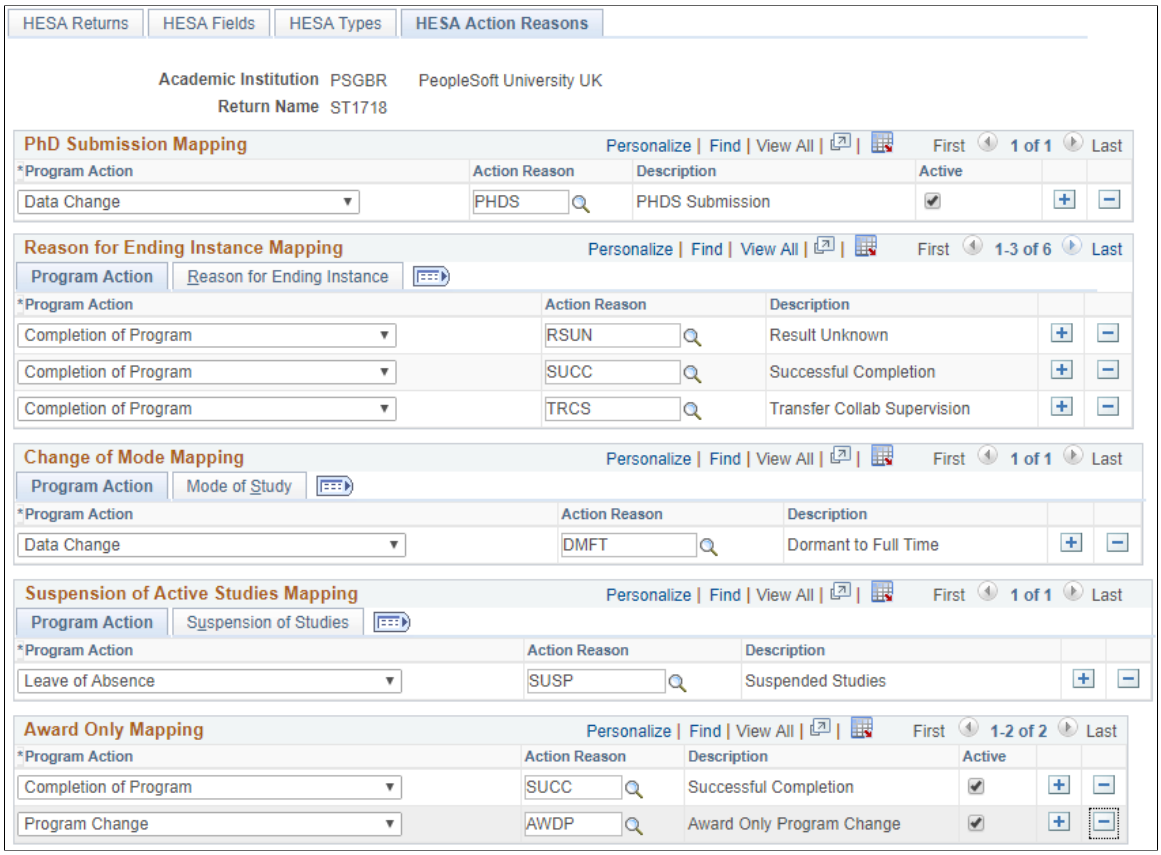
Image: HESA (Higher Education Statistics Agency) Action Reasons page

This example illustrates the fields and controls on the HESA (Higher Education Statistics Agency) Action Reasons page. You can find definitions for the fields and controls later on this page.



Use this page to define the combinations of program action and action reason that the system uses to indicate PHD submission for research students, reason for ending studies, mode change, suspension of active studies, and award-only mapping.

For each region, if you edit the Program Action values the corresponding Action Reason fields are cleared to prevent an invalid combination from being saved.

Note: The Phd Submission Mapping and Suspension of Active Studies Mapping regions are not applicable for the ITT return.

Phd Submission Mapping

Bundle 52. Added StudentCourseSession.PHDSUB

The system uses this mapping to derive the Instance.PHDSUB and StudentCourseSession.PHDSUB fields.

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Reason for Ending Mapping

Bundle 52.

- Region is renamed from Reason for Ending Instance Mapping
- Reason for Ending Instance column is renamed to Instance Reason and is now an optional field.
- New field: Session Reason. This is used to derive StudentCourseSession.RSNSCSEND

Map the program action and action reason values to the HESA Reason for Ending Instance codes. Click the Reason for Ending Instance tab to enter the HESA Reason for Ending Instance code.

The system uses this mapping to derive Student return's Instance.ENDDATE and Instance.RSNEND fields, ITT return's Student.ENDDATE and Student.RSNEND fields, and Data Futures return Leaver.RSNREGEND field and StudentCourseSession.RSNSCSEND.

Change of Mode Mapping

Bundle 52

- New optional field: Session Status
- Mode of Study and Mode of Direction are now optional

Map the program action and action reason values to the HESA Mode of Study and HESA Mode Direction codes. Click the Mode of Study tab to enter the HESA mode of study and direction codes.

The system uses this mapping to derive the Student return's Instance.MODE field and ITT return's Student.MODE field.

Suspension of Active Studies Mapping

Map the program action and action reason values to the HESA Suspension of Studies codes. Click the Suspension of Studies tab to enter the HESA Suspension of Studies codes.

The system uses this mapping to derive the Instance.NOTACT field.

Award Only Mapping

The mapping in this grid is used in cases where the student’s program or plan is changed in order to make an intermediate award. When this happens, you must define the combinations of program action and reason that are used to make the change and complete the program. For example, Program Change/AWDP followed by Completion of Program/SUCC and those rows in Student Program/Plan are not considered when determining the COURSEID for the instance. This ensures continuity with what has been previously reported to HESA for that instance. The new program or plan is considered for the derivation of Qualifications Awarded. If you do not set a mapping as active, the program action and reason mapping continues to be considered.

This grid appears only for Student and ITT returns.

Action Reason	(Optional) If you do not define a value, all action reasons (including blanks) are considered for the Program Action.

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Active By default, this check box is selected. You can deselect this check box to indicate that the mapping row is considered.

Configuring HESA

Access the HESA Configuration page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Configuration > HESA Configuration).

Institution Details

UKPRN Enter a value that you want the system to return in the Institution.UKPRN field of the return.

Show Further Education page Select to enable the Further Education page on the HESA Instance Details component (SSR_HE_INSTANCE).

If this check box is deselected, you cannot access the Further Education page.

Note: The fields on the Further Education page are relevant only to institutions in England and Wales.

Show Financial Support region Select to enable the Financial Support region in HESA Instance Details component. Institutions in England can select this check box and institutions in Scotland, Northern Ireland and Wales can deselect this check box.

Show ITT Placement region Select to enable the ITT Placement records in the HESA Instance Details component.

Student Identifier Generation

Use this region to configure HUSID before running the Create HUSID process or the Create Extract process.

Note: For students without HUSIDs, the system creates HUSIDs when you run the Create Extract process for the Student return. However, if you want to create these IDs at the point of registration or enrollment for new students and before running the Create Extract process, run the Create HUSID process.

For information about defining external systems and entering external system IDs for a person or an organization, see:

- "Defining External Systems" (PeopleSoft Campus Solutions 9.2: Campus Community)
- "Entering External System IDs" (PeopleSoft Campus Solutions 9.2: Campus Community)

HESA Institution Identifier (Optional) Set the institution identifier. This value is used to generate part of the HUSID.

Sequence Number Enter the starting number for the system-assigned six-digit number included in the 13-digit HUSID number. For each student without an existing HUSID, the Create HUSID process

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or the Create Extract process assigns a unique 13-digit HUSID value in the return.

HUSID External System (Optional) Select the ID type that the Create HUSID or Create Extract process uses for HUSID value.

SID External System (Optional) Select the ID you want to use to generate SID records for the Data Futures return.

Grading Basis Inclusion and Repeat Code Exclusion

These regions enable you to specify which Grading Basis values to include and which Repeat Codes to exclude in the Create Extract, Calculate Full-Time Equivalence, and Calculate Year of Student processes.

In the Grading Basis Inclusion region, when you select a Grading Basis and select a check box for the Extract, FTE, or the Year of Student process, the selected Grading Basis is considered by the selected process. In the Repeat Code Exclusion region, when you select a Repeat Code and select a check box for the Extract, FTE or Year of Student process, the selected process excludes class enrollments for the selected Repeat Code.

See Setting Up Your System for Grading

See Understanding Repeat Checking Functionality

Drop Reason Exclusion

Use this region to define one or more reasons for dropping an enrollment. The Create Extract process for the Data Futures return, Calculate Full-Time Equivalence (FTE), and Calculate Year of Student processes utilizes the reasons you select to determine which records are excluded.

DLHE Survey

Allow incomplete submission Select to allow incomplete submission of the Enter Survey self-service page data.

If this check box is:

- Not selected and the student clicks the Submit button on Section F of the Enter Survey self-service page, then:
  - if there are any questions in the Incomplete Questions section then a message *(In order to submit your survey all questions must be complete. Please update any incomplete questions and then select Submit)* appears and the system saves the survey record but does not submit it. The student can then navigate back to other sections and enter the answers.
  - If all the questions are answered, the system submits the survey.
- Selected and the student clicks the Submit button, then:

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- if Q1 appears in the Incomplete Questions section, then a message *(In order to submit your survey Section A must be complete. Please update any incomplete questions and then select Submit)* appears and the system saves the survey record but does not submit it. The student can then navigate back to Section A to enter the answers.
- if Q1 is answered, the system submits the survey.

This check box is applicable only for students accessing the Enter Survey self-service page. If you are accessing the Enter Survey self-service page by clicking the Enter Survey button on the Survey Management page, then this check box does not impact you.

Hide Qualified Teacher Status

If you select this check box, the system does not display the following on both student and administrator versions of the survey:

- Your Education Summary region in Section A.
- Help text and the Newly Qualified Teacher Status check box in Section C (however, admin users can still update the Newly Qualified Teacher Status check box on the Survey Details page).

Hide Save and Return

If you select this check box, the system does *not* display the Save and Return button and the Cancel button on each section of the student version of the survey (but the system will display the Save button on the administrator version of the survey).

Require mandatory questions

If you select the Allow incomplete submission check box, this check box becomes available.

If the Allow incomplete submission is selected and the Require mandatory questions is not selected, then the students can submit the survey as long as Section A is complete (regardless of whether or not the Incomplete Questions list in section F contains optional or required fields).

If both the Allow incomplete submission and Require mandatory questions check boxes are selected, then the students will not be able to submit if there are any required questions listed in the Incomplete Questions list; students will be able to submit if only optional questions or no questions are included in the Incomplete Questions list.

This check box is applicable only for students accessing the Enter Survey self-service page. If you are accessing the Enter Survey self-service page by clicking the Enter Survey button

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on the Survey Management page, then this check box does not impact you.

Generating Student Identifiers During Registration or Enrollment

Access the Create Student Identifiers page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Create HUSID).

Use this page if you want to create Student identifiers (SIDs) or HUSIDs when registering or enrolling new students and before running the Create Extract process.

To create a HUSID, the process selects a student's earliest MATR Student Program record . If the MATR record is not available, then it selects the student's earliest ACTV record. If a record is found, the process uses the record's effective date for the entry year element. Then, the Create HUSID process uses the following logic to generate the HUSID value for a student who does not have a HUSID:

- The first two digits of HUSID represent the year the student entered the Institution (for example, 08 for 2008). The entry year is determined as the final two digits of the year element of the effective date of the selected Student Program record.
- The next four digits represent the institution identifier.
  - The process calculates the institution identifier as Institution Code plus 1000 (for example, 0184 is calculated as 1184)
  - Note that the process picks the Institution Code value from the HESA Configuration page.
- The next six digits represent the system assigned sequence number.
  - Note that the starting number is defined in the HESA Configuration page. The process assigns this number for the first student for whom calculation is done.
  - The system automatically increases the starting number by one when it assigns a new sequence number.
- The final digit is a check digit based on the existing ten digits. See the HESA website for details on check digit calculation.

ID Type

Select:

- HUSID external system, if you are creating a HUSID.
- SID external system, if you are creating a student identifier (SID) for Data Futures return.

  If you select an SID external system, the Create from HUSID and Create New check boxes appear.

Create from HUSID

Select this check box to create SID records for students who don’t have SIDs by using their existing HUSID records. Students must also have an active Student Program record for the institution.

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By default, this check box is deselected.

Create New

Select this check box to create new SID records. By default, this check box is selected.

To create an SID, the system uses a similar logic when creating a HUSID. However, the system formats the SID according to the UKPRN and SID external system values from the HESA configuration instead of the institution identifier and HUSID external system. For SIDs, the:

- first two digits are the last two digits of the year of entry into the institution
- next eight digits are the institution's UKPRN
- next six digits represent the six-digit reference number internally allocated by the institution
- last digit is a check digit, which provides a way to detect errors in transcription. This is calculated using the first 16 digits of the SID.

Note: If you select this check box *and* the Create from HUSID check box, the system first creates SIDs from existing HUSIDs before creating new SIDs.

Start Date

Specify a date if you want the process to only examine Student Program records that are active or matriculated on or after the specified date. For example, if you enter January 5, 2009, the process creates HUSIDS or SIDs for students who have records that have a program action of MATR or ACTV with an effective date of January 5, 2009 or later.

Setting Up and Entering Data for HESA Reporting

This section provides an overview of setting up and entering data for HESA reporting and discusses how to:

- Set up data capture rules.
- Enter HESA Data for an institution.
- Enter HESA data for an academic program.
- Enter HESA data for a program offering and program year.
- Enter HESA data for an academic plan.
- Enter HESA data for a plan offering and plan year.
- Enter HESA data for a subplan.

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- Enter HESA data for a subplan offering and subplan year.
- Create HESA modules.
- Enter HESA data for a module.
- Enter HESA data for a dummy module.
- Create HESA Instance and Person HESA Data Records for students.
- Restrict access to person HESA data fields.
- Enter HESA data for a person.
- Enter restricted HESA data for a person.
- Enter HESA Instance data for a student.
- Entering mobility data for a student.
- Enter HESA Entry Profile data for a student.
- Calculate Year of Student values for students.
- Calculate Full-Time Equivalence for students.
- Enter HESA advisor data for a student.
- Enter DEGEST value.
- Enter DEGTYPE value.

Understanding Setting Up and Entering Data for HESA Reporting

To derive a field, the system checks each data capture level to find out whether a field value has been defined. Each level is associated with a Campus Solution page or a group box. For example, to derive the Instance.EXCHANGE field, after checking if a constant value exists for a field, the system first looks at the Instance level to see if the field value has been defined on the HESA Instance page. If it does not find a value at the Instance level, then it checks whether a value has been defined on the following pages and group boxes:

1. Sub-Plan Year HESA Data group box in the Sub-Plan Offering/Year HESA page (Subplan Year level).

   You can define field values at this level when different values are required for different years of program and the subplan is being reported to HESA. For example, if students in year three of a full-time offering undertake an exchange year away from the home institution, then the appropriate Instance.EXCHANGE value can be defined for that offering year at the Subplan Year level.

2. Sub-Plan HESA Data page (Subplan level)

   The system looks at this level only if the Course entity is based on a subplan.

3. Plan Year HESA Data group box in the Plan Offering/Year HESA page (Plan Year level)

4. Plan HESA Data page (Plan level)

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5. Program Year HESA Data group box in the Program Offering/Year HESA page (Program Year level)
6. Program HESA Data page (Program level)

   Although the system derives Course records from either plans or subplans, you can define values at the program level if required. Typically, you would define a field value at the program level when you want the system to derive the same HESA field value for all the child plans, subplans, or both child plans and subplans of a program. For example, if a program exists specifically for incoming exchange students, define the appropriate Instance.EXCHANGE value only at the program level. The system includes this program level field value in the return for all the Instances associated with the plans or subplans of the program.

The system looks at the Subplan Year and Subplan levels only if the course entity is based on a subplan. For Subplan Year and Plan Year levels, the system uses the field values defined for the combination of Academic Load and Year of Program of the student instance.

The pages and group boxes for other levels include:

- Program Offering HESA Data group box in the Program Offering/Year HESA page (Program Offering level)
- Plan Offering HESA Data group box in the Plan Offering/Year HESA page (Plan Offering level)

  You can define field values at the Plan Offering level when you want to report different field values for different offerings. For example, the expected length of study (Instance.SPLENGTH) for students studying a full-time offering will typically be different from that of a part-time offering. In this case, you can define different values at plan offering level for each offering.
- Sub-Plan Offering HESA Data group box in the Sub-Plan Offering/Year HESA page (Subplan offering level)
- Module HESA Data and HESA Dummy Module Data pages (Module level). Module level is equivalent to the Course Offering level. The system uses the field values entered at the Module level to create the Module, Module Subject, and Student On Module entities.
- HESA Student Data page (Student level).

  The system uses the field values entered at the Student level to create the Student entity.
- Advisor HESA Data page (Advisor level)

  Use this page to define research units of assessment for an instructor or an advisor. The system uses the values entered at this level to create the RAE Data entity.
- Institution HESA Data page (Institution level)

  Use this page to capture data for Unistats/KIS fields and Unistats/KIS location data for the academic institution.

After you import the HESA codes and define the data capture rules in the Institution Data Capture page, you can:

- Enter return field values at the institution and academic program, plan, and subplan levels.
- Enter return field values at the program, plan and subplan offering levels. An *offering* is a program, plan, or subplan associated with an academic load.

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- Enter return field values at the program, plan, and subplan program year levels. A *program year* is a program associated with an academic load and year of program.
- Enter return field values for modules and module subjects for course offerings.
- Review and edit return field values for student personal attributes such as nationality and ethnicity. Some of the data that the system uses for HESA reporting, such as addresses, will already be in your database.
- Use the Create HESA Instance Application Engine (SSR_HE_CRTHE) process to specify the student data you want to report.
- Review and enter Instance-specific return field values, such as entry qualifications, year of program, and qualifications awarded.

You can decide at which levels the system should capture data for HESA reporting. For example, you can decide not to enter a Course.CLSDCRS value in the Program HESA Data page but enter it in the Plan HESA Data page. You can decide to enter the Instance.FEEELIG value in the HESA Instance page for each student rather than storing the Instance.FEEELIG data in the Program HESA Data page.

The system can create Course entities from either plans or subplans, depending on your academic structure setup. For example, you can either select the Biology plan for reporting to HESA or select its subplans, such as Molecular Biology and Marine Biology, for reporting to HESA, but you cannot select both.

The pages you use for entering HESA data at various levels are available only if you select the HESA, UCAS check boxes on the SA Features and the Academic Institution 6 pages.

Note: For information about the delivered functionality for deriving the HESA return fields, see Understanding HESA Derivation Steps.
You can use the Institution Data Capture page to determine at which level the system should derive the fields.
Other than the various data capture levels, the system may use a constant or a default value set up on the HESA Fields page based on the derivation logic.

Deriving FTE Calculation Type and FTE Load

On each data capture page (which corresponds to a data capture level), optional Full-Time Equivalence (FTE) Calculation Type and FTE Load fields are available. The Calculate Full-Time Equivalence process uses the field values to determine which FTE calculation type to use for each student. If you select *Derive load from Program* as the calculation type, the process uses the FTE Load value for calculation.

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Pages Used to Set Up and Enter Data for HESA Reporting

Page Name	*Definition Name*	*Navigation*	*Usage*
Institution Data Capture	SSR_HE_INST_DATA	Records and Enrollment > HESA Reporting > HESA Returns Setup > Data Capture Setup	Create and maintain the rules to capture HESA data in the system. Use this page to control which fields are available on the various HESA data capture pages. Use this page to make any new fields (that are delivered with a Campus Solutions update) available on the HESA data capture pages.
Institution HESA Data	SSR_HE_INST_HEDATA	Records and Enrollment > HESA Reporting > HESA Returns Setup > Institution Data	Enter or modify values that the system can use for creating Unistats/KIS return's Institution and Location entity data at the institution level.
Program HESA Data	SSR_HE_PROG	Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Program HESA Data	Enter or modify values that the system can use for creating Student return's Course, Course Subject, and Instance entity data at the program level. Indicate the HESA subjects that the system can use for creating ITT return's Course Subject entity data (SBJCA field) at the program level. Enter values for Unistats/KIS entities (KISCourse, CourseStage and Accreditation entities).
Program Offering/Year HESA	SSR_HE_PROG_OFFRYR	Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Program Offering/Year HESA	Enter or modify values that the system can use for creating Student return's Instance entity data at the program offering and program year levels.

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Page Name	Definition Name	Navigation	Usage
Plan HESA Data	SSR_HE_PLAN	Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table > Plan HESA Data	Enter or modify values that the system can use for creating the following at the plan level: Student return's Course, Course Subject, and Instance entity data. Aggregate Offshore return's Provision entity data. ITT return's Course Subject entity data (SBJCA field). Unistats/KIS return's KISCourse, CourseStage, Accreditation, HESACourse and ILRAims entities.
Plan Offering/Year HESA	SSR_HE_PLAN_OFFRYR	Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table > Plan Offering/Year HESA	Enter or modify values that the system can use for creating Student return's Instance entity data at the plan offering and plan year levels.
Sub-Plan HESA	SSR_HE_SUBPLAN	Set Up SACR > Foundation Tables > Academic Structure > Academic SubPlan Table > Sub-Plan HESA	Enter or modify values that the system can use for creating the following at the subplan level: Student return's Course, Course Subject, and Instance entity data. Aggregate Offshore return's Provision entity data. ITT return's Course Subject entity data (SBJCA field). Unistats/KIS return's KISCourse, CourseStage, Accreditation, HESACourse and ILRAims entities.
Sub-Plan Offering/Year HESA	SSR_HE_SPLN_OFFRYR	Set Up SACR > Foundation Tables > Academic Structure > Academic SubPlan Table > Sub-Plan Offering/Year HESA	Enter or modify values that the system can use for creating Student return's Instance entity data at the subplan offering and subplan year levels.
Create HESA Module Data	SSR_HE_CREATECRSE	Records and Enrollment > HESA Reporting > HESA Returns Setup > Create Module	Create HESA module data records for an academic institution.

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Page Name	Definition Name	Navigation	Usage
HESA Module Data	SSR_HE_CRSE	Curriculum Management > Course Catalog > HESA Module Details	Update a HESA module data record that the Create HESA Module Data created or manually create a HESA Module Data record. Enter or modify values that the system can use for creating Student return's Module, ModuleSubject, and Student on Module entity data at the module level.
HESA Dummy Module Data	SSR_HE_CRSE_DUMMY	Curriculum Management > Course Catalog > HESA Dummy Module Details	Manually create a HESA dummy module data record. Enter HESA field and Module Subject values for the dummy Module record.
Create HESA Instance	SSR_HE_CREATEHESA	Records and Enrollment > HESA Reporting > HESA Returns Setup > Create Instance	Run the process to create HESA instance and Person HESA Data records for new matriculated students. You can specify whether you want to create records for matriculated students of a particular academic institution, program, plan, or subplan. In addition, you can specify a date to have the process generate records of students who matriculated on or after the specified date.
Fields	SSR_HE_FIELDS	Records and Enrollment >HESA Reporting >HESA Returns Setup >Fields	Restrict access to Person HESA Data fields on the HESA Student Data page. The system uses the values for the Person HESA Data fields to create Student entity.
HESA Student Data	SCC_HE_PERSON	Campus Community > Personal Information > Add/Update a Person > HESA Student Data	Update a Person HESA Data record that the Create HESA Instance created or manually create a Person HESA Data record. View, enter or modify values for a person that the system can use for creating Student entity data at the student level (for the Student and ITT returns).
HESA Restricted Data	SCC_HE_PERSON_RES	Campus Community >Personal Information >Add/Update a Person >HESA Restricted Data	View, enter or modify Person HESA Data record values for fields that are restricted through the Fields page. The system can use these values for creating Student entity data at the student level (for the Student and ITT returns).

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Page Name	*Definition Name*	*Navigation*	*Usage*
HESA Instance	SSR_HE_INSTANCE	Records and Enrollment > Career and Program Information > HESA Instance Details > HESA Instance Alternatively, access Records and Enrollment > Career and Program Information > Student Program/Plan > Student Program and click the HESA Instance link.	Update a HESA instance record that the Create HESA Instance created or manually create a HESA instance record. Enter or modify values that the system can use for creating Instance, Qualifications Awarded, and RAE entity data at the instance level (for the Student return). Enter or modify values that the system can use for creating Student entity data (for the ITT return) View or edit the Year of Student value that the Calculate Year of Student process has calculated. View or override the FTE value that the Calculate Full-Time Equivalence process has calculated.
Mobility	SSR_HE_INST_MOB	Records and Enrollment >Career and Program Information >HESA Instance Details >Mobility	Enter or modify values that the system can use to create Mobility entity data.
Entry Profile	SSR_HE_ENTRPROFL	Records and Enrollment > Career and Program Information > HESA Instance Details > Entry Profile	Enter or modify values that the system can use for creating Student return's Entry Profile and Qualifications entity data.
Further Education	SSR_HE_FUR_EDU	Records and Enrollment > Career and Program Information > HESA Instance Details > Further Education	Enter or modify values that the system can use for creating FE-specific entities and fields.
Calculate Year of Student	SSR_HE_CALC_YRSTU	Records and Enrollment > HESA Reporting > Extract Processing > Calculate Year of Student	Calculate the Year of Student values of all the active HESA instance records for a particular reporting period. The system uses the calculated value to derive the Instance.YEARSTU field.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Calculate Full-Time Equivalence	SSR_HE_CALC_FTE	Records and Enrollment > HESA Reporting > Extract Processing > Calculate FTE	Calculate the FTE value that represents the student's academic load for the reporting period. The system uses the calculated value to derive the Instance. STULOAD field.
Advisor HESA Data	SSR_HE_INST_ADV	Curriculum Management > Instructor/Advisor Information > Instructor/ Advisor Table > Advisor HESA Data	For an advisor, enter or modify values that the system can use for creating the Student return's RAE Data entity.
Regional	EXT_ORG_TBL_REG	Campus Community > Organization > Create/ Maintain Organizations > Organization Table > Regional	Enter or modify the value that the system can use to derive the Student.DEGEST value (ITT return).
Degree Table	SA_DEGREE_TABLE	Set Up SACR > Foundation Tables > Academic Structure > Degree Table	Enter or modify the value that the system can use to derive the Student.DEGTYPE value (ITT return).

Setting Up Data Capture Rules

Access the Institution Data Capture page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Data Capture Setup).

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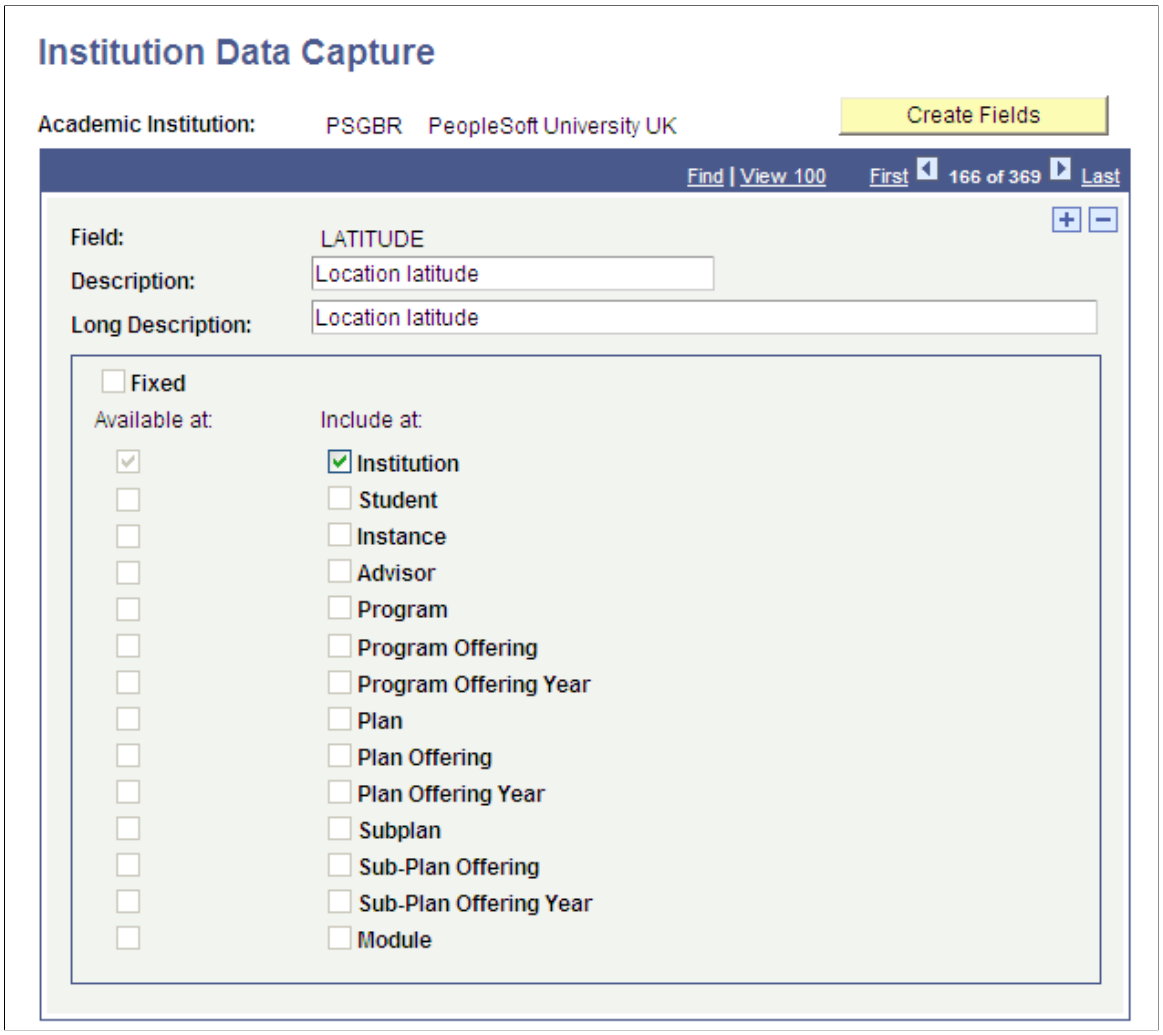
Image: Institution Data Capture page

This example illustrates the fields and controls on the Institution Data Capture page. You can find definitions for the fields and controls later on this page.



Create Fields

Click to create a data capture record from the delivered data. When you click this button, the system creates all the fields and, for each field, selects the check boxes to indicate at which level the system captures data to derive the field.

After you have created a data capture record, use the Create Fields button to add new fields that you have created using the Fields page. For example, you have clicked the Create Fields button to create a data capture record. After creating the data capture record, you create a new field using the Fields page. To add this new field to the data capture record, click the Create Fields button.

Note: You must click the Create Fields button to add any new fields that have been added as part of a Campus Solutions update to make them available in data capture.

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Fixed

Indicates whether you can configure the data capture levels or if the levels are non-configurable (fixed).

You cannot select or clear the Fixed check box. If the system has not selected the Fixed check box, you can clear or select the Include At check boxes.

Available At

Indicates the level at which the system can derive the field value. You cannot select or clear the Available At check boxes.

Include At

Select or clear to indicate the level at which you want the system to capture the field value.

As an initial default, the Include At check box appears selected for each level where the field value can be captured. You can clear the Include At check box to ensure that the field value cannot be entered at the corresponding page of that level.

You can select or clear an Include At check box only if the corresponding Available At check box is selected by the system. However, if the system has selected the Fixed check box, you cannot select or clear the Include At check boxes for the field.

Entering HESA Data for an Institution

Access the Institution HESA Data page (Records and Enrollment >HESA Reporting >HESA Returns Setup >Institution Data).

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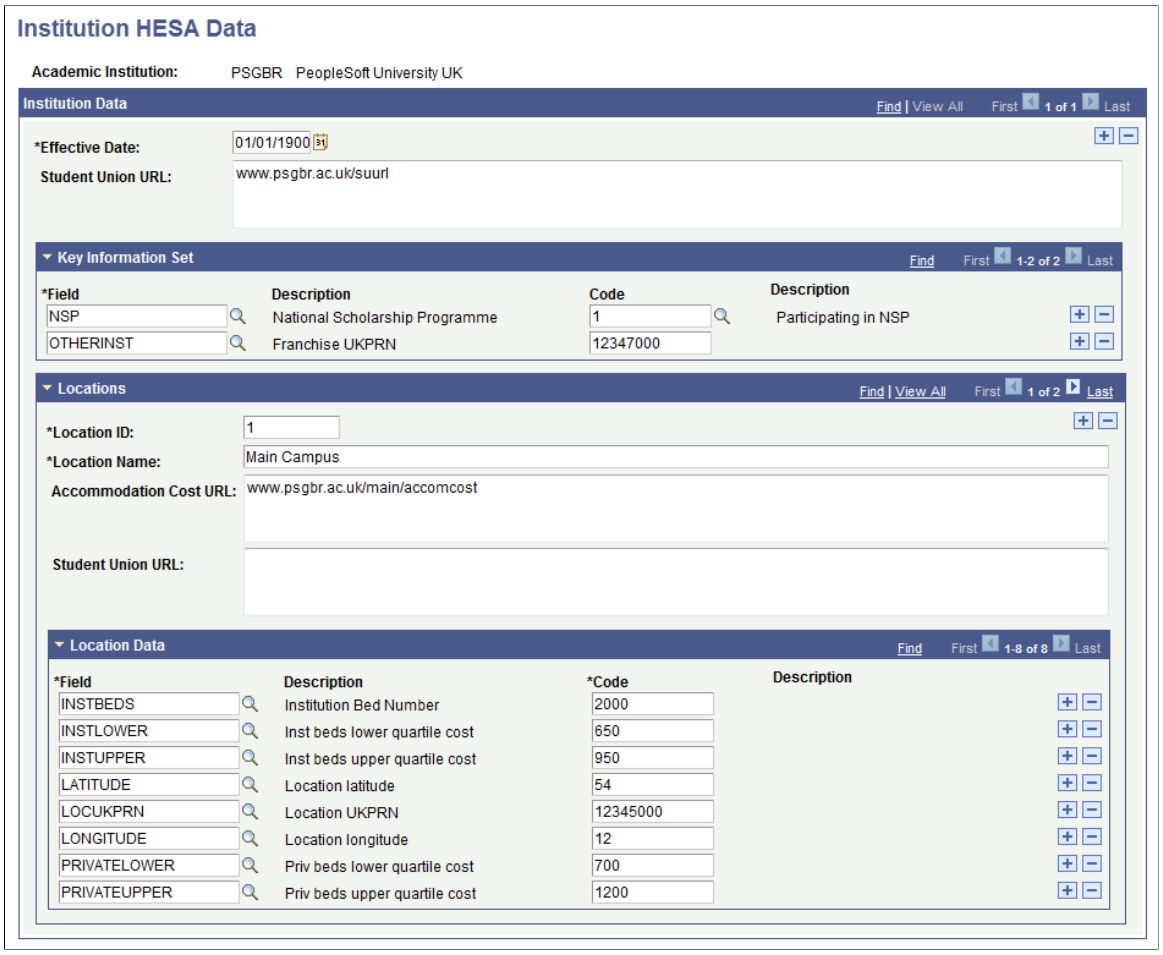
Image: Institution HESA Data page

This example illustrates the fields and controls on the Institution HESA Data page. You can find definitions for the fields and controls later on this page.



This page is applicable for only Unistats/KIS return. The following table describes the type of data that you can enter in each group box of this page:

Group Box	***Used for Entering***
Unistats/Key Information Set	Institution entity fields and their associated values
Locations	KIS Location records for the institution. A maximum of 50 records can be entered.
Location Data	Location entity fields and their associated values for each KIS Location record.

The Field prompt values in these group boxes are restricted to fields that are defined in the Institution Data Capture page as *Include at* Institution level.

Entering HESA Data for an Academic Program

Access the Program HESA Data page (Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Program HESA Data).

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Image: Program HESA Data page (1 of 2)

This example illustrates the fields and controls on the Program HESA Data page (1 of 2). You can find definitions for the fields and controls later on this page.

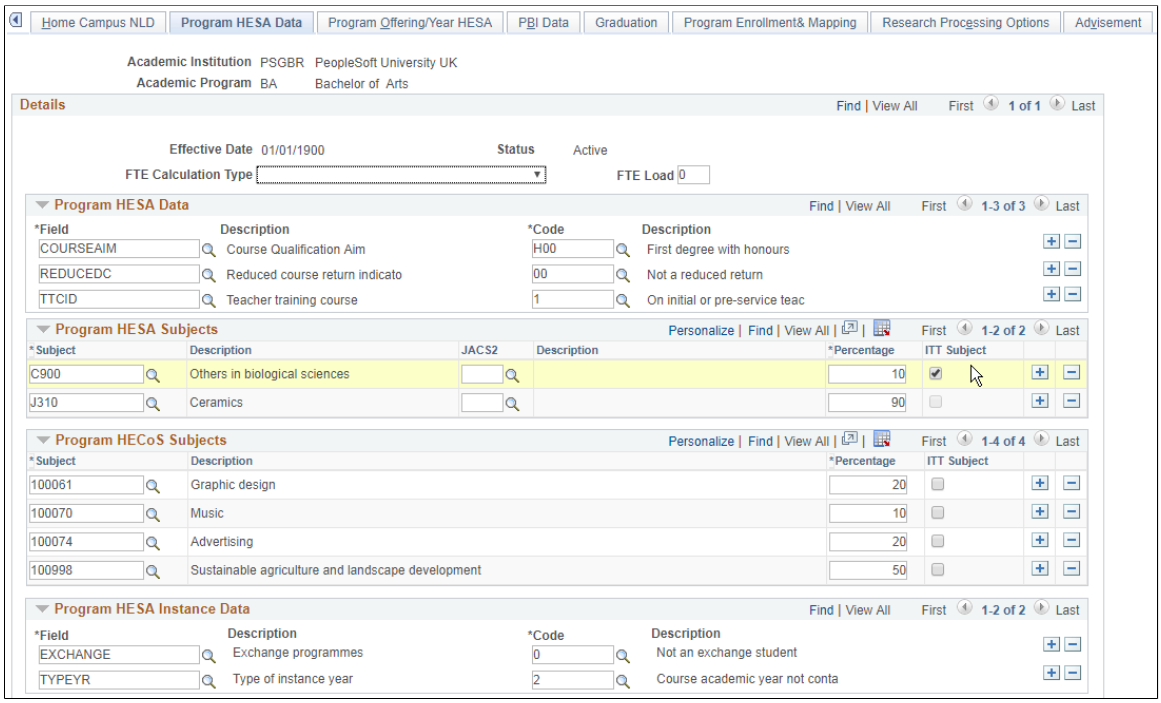

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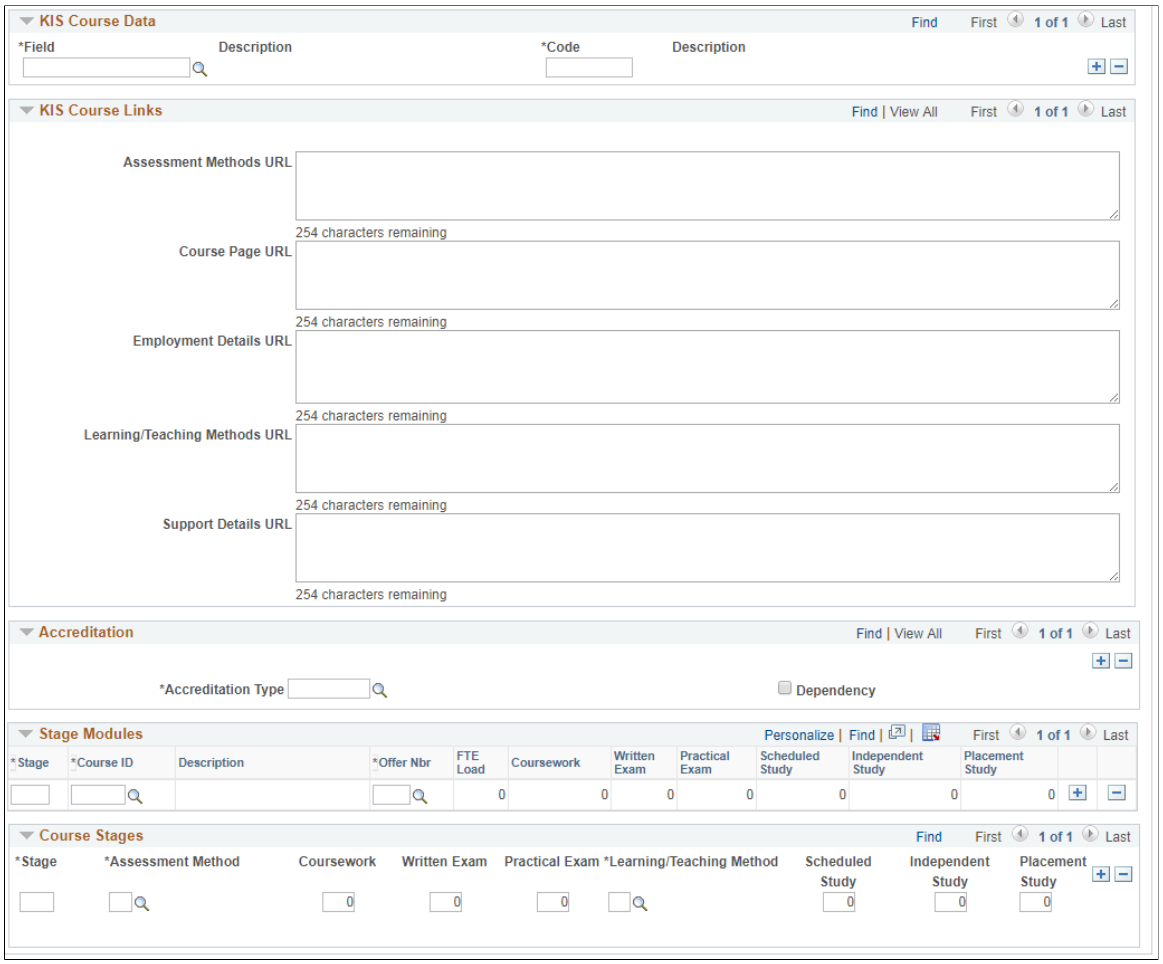
Image: Program HESA Data page (2 of 2)

This example illustrates the fields and controls on the Program HESA Data page (2 of 2). You can find definitions for the fields and controls later on this page.



Qualification ID Use this field to indicate the ID that links Course Delivery and Qualification.

The following table describes the type of data that you can enter in each group box:

Group Box	*Used for Entering*
Program HESA Data	Student return's Course entity fields and their associated values. Unistats/KIS return's KISCourse entity fields and and their associated values.
Program HESA Subjects	Student return's CourseSubject entity field values. KISCourse entity's JACSA, JACSB and JACSC fields and and their associated values.
Program HECoS Subjects	Data Futures return's CourseSubject entity field values
Program HESA Instance Data	Instance entity fields and their associated values.

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Group Box	*Used for Entering*
KIS Course Data	KISCourse entity fields and their associated values.
KIS Course Links	Values for URL fields of KISCourse entity, such as the CRSEURL field.
Stage Modules and Course Stages	Unistats/KIS CourseStage entity fields and their associated values.
Accreditation	Unistats/KIS Accreditation entity fields and their associated values.

Program HESA Subjects

You can define a maximum of three subjects. The total percentage for the three subjects must equal 100.

Subject Enter a value that the system will use to derive the CourseSubject.SBJCA field.

JACS2 Enter a value only if the JACS3 value entered in the Subject field is not valid in JACS2 (that is, the value entered in the Subject field is a JACS3 code that does not appear in JACS2 prompt).

Percentage Enter a value that the system will use to derive the CourseSubject.SBJPCNT field.

ITT Subject (Initial Teacher Training subject) Select to indicate that the subject is an ITT subject. The system uses this check box setting to derive the CourseSubject. ITTSUBJECT field.

The system enables the check box only if the HESA Subject is valid for the ITT return. The valid SBJCA values for ITT return are available on the HESA web site.

Program HECos Subjects

You can define a maximum of five subjects for the Data Futures return. The total percentage for all five subjects must equal 100.

Subject Enter a value that the system will use to derive the CourseSubject.SBJCA field.

Percentage Enter a value that the system will use to derive the CourseSubject.SBJPCNT field.

ITT Subject (Initial Teacher Training subject) Select to indicate that the subject is an ITT subject. The system uses this check box setting to derive the CourseSubject. ITTSUBJECT field.

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Accreditation

Accreditation Type

(Optional) Enter a value that the system will use to derive the Accreditation.ACCTYPE field.

Each row on the Accreditation group box must have a unique accreditation type. If codes are not provided in the Cnn061CodeLists.xsd file, then you manually add the codes for this field through the Codes page.

Accreditation ID

(Optional) Select an accreditation ID. This ID is used to determine which records are considered for the Curriculum Accreditation entity in the Data Futures return.

Dependency

If you select this check box, the system derives the Accreditation.ACCDEPEND as *1*.

When you select this check box, the Accreditation Dependency URL field appears.

This field is applicable only to Unistats.

Accreditation Dependency URL

Enter a value that the system uses to derive the Accreditation. ACCDEPENDURL field.

This field is applicable only to Unistats.

Stage Modules

Note: This data is no longer required because the Course Stages entity has been removed from the Unistats return.

This group box enables you to define the course offerings associated with each stage of the course and displays the FTE and assessment and teaching/learning values defined for each course offering in the HESA Module Data record.

Course Stages

Note: This data is no longer required because the Course Stages entity has been removed from the Unistats return.

The read-only row in this group box displays the weighted averages (by FTE) for the six % percentage fields based on any records added to the Stage Modules group box.

For example, based on the modules defined in the Stage Modules group box of the example graphic, the row for Stage 1 in the Course Stages grid would include read-only percentage fields below the updatable fields for Coursework, Written Exam, Practical Exam, Scheduled Study, Independent Study and Placement Study.

Each of the fields contains the average weighted by FTE for that element to 2 decimal places, for example, the weighted average value for Coursework from the records shown below would be FTE of each module multiplied by the Coursework value for each module. The total for all the modules would then be divided by the total FTE to get the average:

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FTE for 666683 * Cwk = 20* 70 = 1400

+

FTE for 666684 * Cwk = 15 * 20 = 300

+

FTE for 666685 * Cwk = 25 *40 = 1000

+

Total = 2700

The total 2700 would then be divided by the total FTE of all the modules, that is 65.

= 2700/60 = 45

The same applies to each of the six fields to give the totals shown above.

You could then decide to (a) add percentage integer values in the updatable fields using the module averages as a guide, example, for Stage 1 add values 43, 39, 18 for Scheduled Study, Independent Study and Placement Study as the module averages rounded to make 100 total, and those values would be derived in the extract or (b) leave all the updatable fields as zero, in which case, if Stage Modules records had been defined, then the values would be derived based on the weighted averages from the modules rounded to the nearest integer with some adjustment to ensure that the total of each group of three fields equals 100. If the updatable fields were all zero and no Stage Modules were defined then each of the fields would be derived as zero.

Entering HESA Data for a Program Offering and Program Year

Access the Program Offering/Year HESA page (Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Program Offering/Year HESA).

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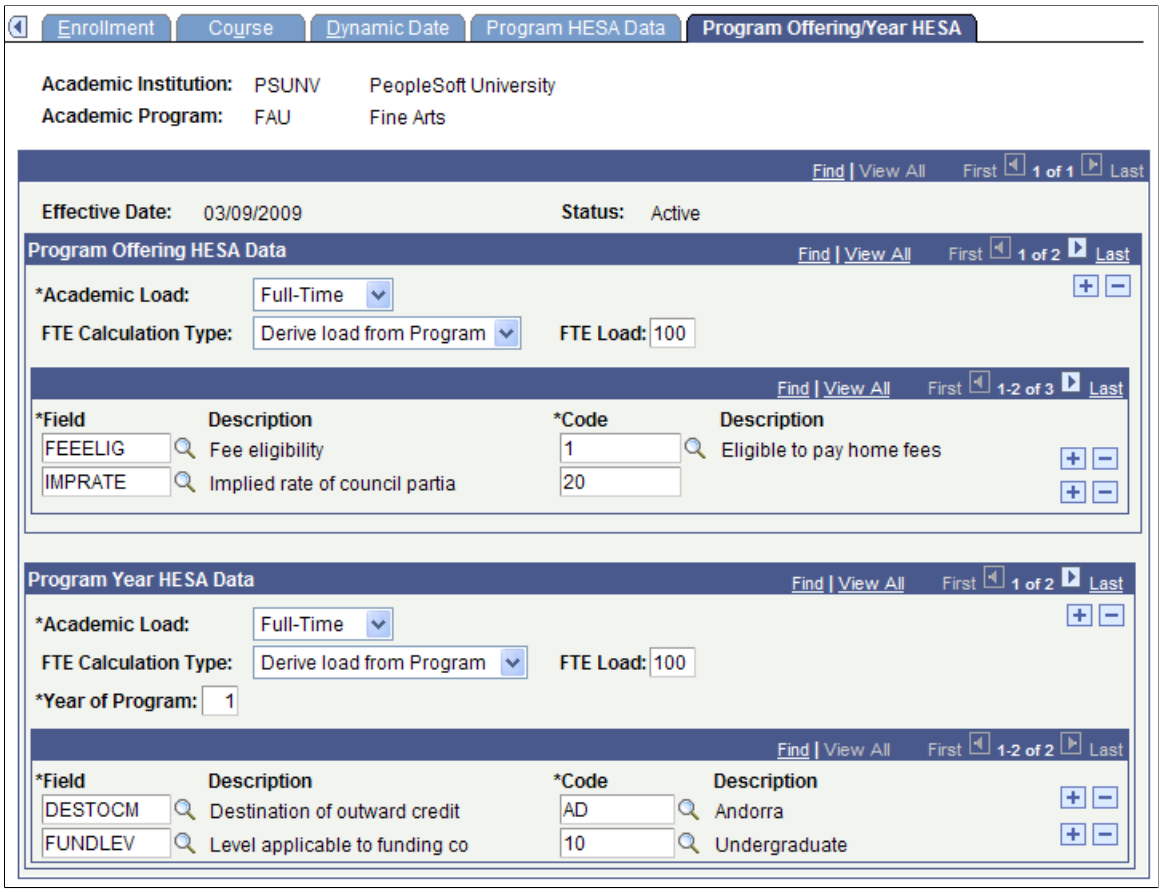
Image: Program Offering/Year HESA page

This example illustrates the fields and controls on the Program Offering/Year HESA page . You can find definitions for the fields and controls later on this page.



You can enter Instance entity field values in the Program Offering HESA Data and Program Year HESA Data group boxes.

Entering HESA Data for an Academic Plan

Access the Plan HESA Data page (Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table > Plan HESA Data).

Group boxes on this page are similar to the group boxes on the Program HESA Data page (except that the Offshore Provision, HESA Course and ILR Aims group boxes do not appear on the Program HESA Data page).

You can use this page to enter return fields and corresponding values which you have not defined at the program level. For example, you can use the Plan Subject HESA Data group box to define course subjects at the Biology plan level instead of at the BS program level.

Qualification ID Use this field to indicate the ID that links Course Delivery and Qualification.

Course Title Optionally, enter a value that the system uses to derive the Course.CTITLE field for the Student return and the KISCourse. TITLEK field for the Unistats/KIS return. If you do not enter

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a value, the system derives the Course.CTITLE value from the plan description.

KIS Title

Enter a value if the KISCourse.TITLEK value should be different from the value required for the Student return's Course. CTITLE. If both KIS Title and Course Title fields are left blank, the system derives the KISCourse.TITLEK value from the plan description.

The system enables this KIS Title field only if KIS Type has a value or at least one of the child subplans has a KIS Type value.

Report to HESA

Select to include the plan in the Course or Provision entity. If you select this check box for a plan, you cannot report data for its subplans.

The system enables this check box only if the Report to HESA check boxes of all the subplans associated with the plan are deselected.

Offshore Plan

Select to display the Offshore Provision group box. If you select this check box, the system includes the plan in the Aggregate Offshore return but does not include the plan in the Student return.

KIS Type

The system enables this field only if KIS Type values of all the subplans associated with the plan are blank. This KIS Type field value is used to determine whether the plan should be included in the KISCourse entity. Blank indicates that the plan is not included in the Unistats/KIS return.

The system enables the KIS Course Data, KIS Course Links, Stage Modules, Course Stages, Accreditation, HESA Course and ILR Aims group boxes and the KIS Title field only if KIS Type has a value or at least one of the child subplans has a KIS Type value.

The system enables the ITT Subject check box only if the HESA Subject is valid for the ITT return. The valid SBJCA values for ITT return are available on the HESA web site.

Offshore Provision

Use the Offshore Provision group box to enter field values for the Provision entity (Aggregate Offshore return).

HESA Course

The system uses the values that you enter in this group box to derive the field values for the Unistats/KIS HESACourse entity.

You can add any number of rows but the HESA Year and Course ID combination must be unique for each row in this group box.

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ILR Aims

The system uses the values that you enter in this group box to derive the field values for the Unistats/KIS ILRAims entity.

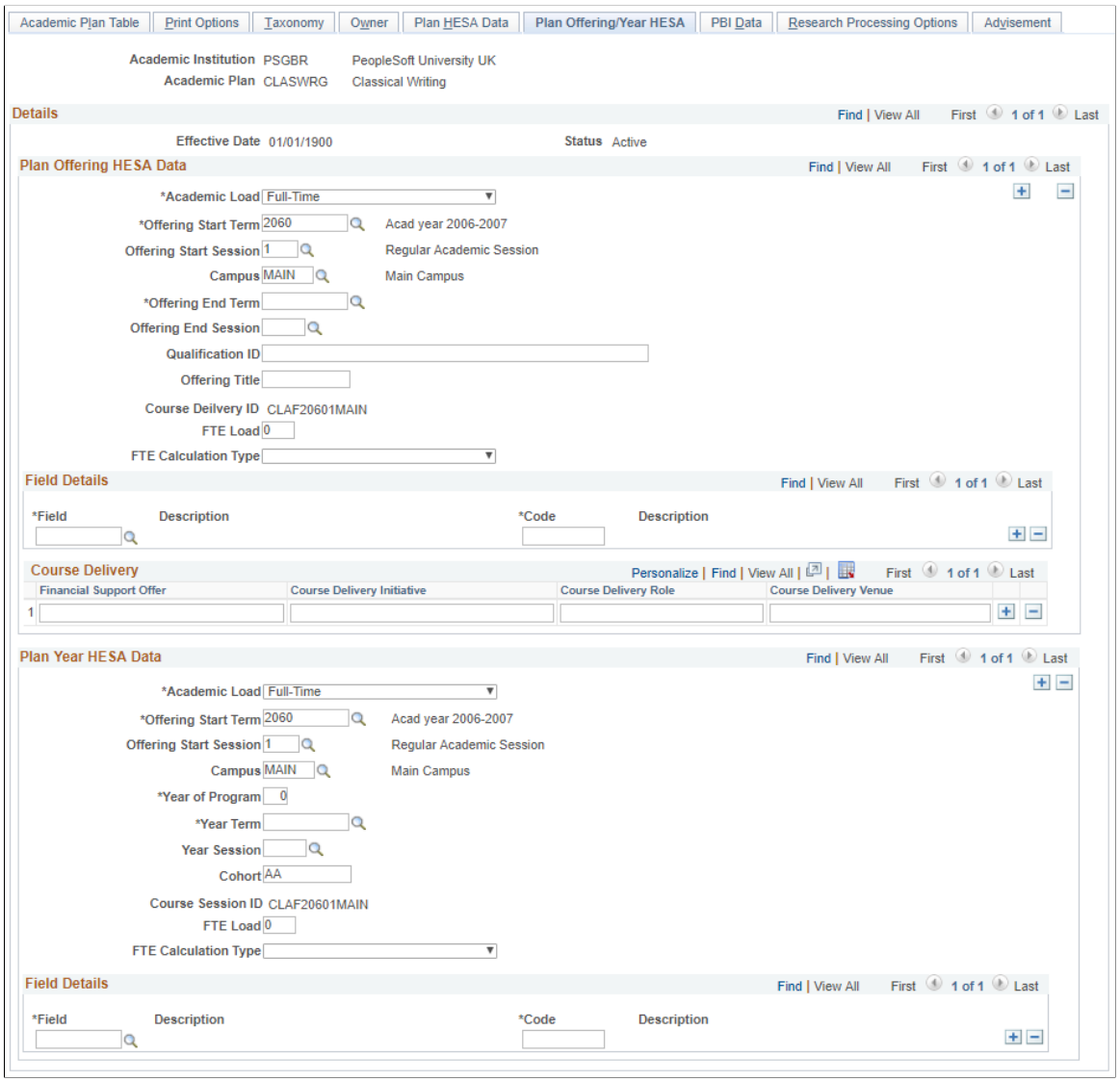
You can add a maximum of 25 records. The ILR Year and ILR Aim combination for each row must be unique.

Entering HESA Data for a Plan Offering and Plan Year

Access the Plan Offering/Year HESA page (Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table > Plan Offering/Year HESA).

Image: Plan Offering/Year HESA page

This example illustrates the fields and controls on the Plan Offering/Year HESA page.



Group boxes on this page are similar to the group boxes on the Program Offering/Year HESA page.

Use the Plan Offering/Year HESA page to enter fields and corresponding values that you did not define at the subplan offering/year or program offering/year levels.

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Plan Offering/Year HESA Data

Offering Start Term	Select a term start date. This value is used to derive CourseDelivery.COURSESTARTDATE. You can override this value if you define a value for COURSESTARTDATE in the Field Details region.
Offering Start Session	(Optional) Use this field to define a session start date if you have different starting points within the academic year or term.
Campus	(Optional) Use this field if you have multiple offerings of a course on different campuses and each course must be returned as separate course deliveries.
Year Term	Define the term when the year of program starts.
Year Load	Use this field to add a load that is different from the offering load. This is if your institution has different course sessions within a course delivery and with a different SESSIONLOCATION.
Offering End Term	Specify the offering end date. This field is used to derive CourseDelivery.EXPECTEDENDDATE. You can override ths value if you specify a term end date in the Field Details region.
Offering End Session	(Optional) Use this field to specify an end date if you have different end dates for sessions within the academic year or term.
Qualification ID	Use this field to indicate the ID that links Course Delivery and Qualification.
Offering Title	(Optional) Specify an offering-specific title that is different from what is reported in Course.COURSENAME. This value is derived for COURSEDELIVERYTITLE.
Cohort	(Optional) Specify a cohort tag for a year of program to allow students to be associated with the course session by cohort.
Course Delivery ID	The system automatically generates this value and is used to identify the course delivery.

Entering HESA Data for a Subplan

Access the Sub-Plan HESA page (Set Up SACR > Foundation Tables > Academic Structure > Academic SubPlan Table > Sub-Plan HESA).

The fields on this page are similar to the fields on the Plan HESA Data page. Like the Plan HESA Data page, the Unistats/KIS group boxes on the Sub-Plan HESA page (KIS Course Data, KIS Course Links, Stage Modules, Course Stages, Accreditation, HESA Course and ILR Aims) appear only if KIS Type field has a value.

The system disables the Report to HESA check box on the Sub-Plan HESA page if you selected the Report to HESA check box for the parent plan on the Plan HESA Data page. Similarly, the system

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disables the KIS Type field on the Sub-Plan HESA page if you selected a value for the KIS Type field for the parent plan on the Plan HESA Data page. That is, the system enables the KIS Type field on the Sub-Plan HESA page only if the KIS Type value of the parent plan is blank. The KIS Type field value on the Sub-Plan HESA page is used to determine whether the subplan should be included in the KIS Course entity. Blank indicates that the subplan is not included in the Unistats/KIS return.

If you want to report values from the subplan level, use the Sub-Plan HESA page to enter the fields and their corresponding values. For example, you can use the Sub-Plan HESA Data group box to define the Course.COURSEAIM value at the Molecular Biology subplan level rather than defining the Course.COURSEAIM value at the Biology plan level or the BS program level.

Select the Offshore Sub-Plan check box to display the Offshore Provision group box. If you select this check box, the system includes the subplan in the Aggregate Offshore return but does not include the subplan in the Student return.

The system enables the ITT Subject Flag check box only if the HESA Subject is valid for the ITT return. The valid SBJCA values for ITT return are available on the HESA web site.

Entering HESA Data for a Subplan Offering and Subplan Year

Access the Sub-Plan Offering/Year HESA page (Set Up SACR > Foundation Tables > Academic Structure > Academic SubPlan Table > Sub-Plan Offering/Year HESA).

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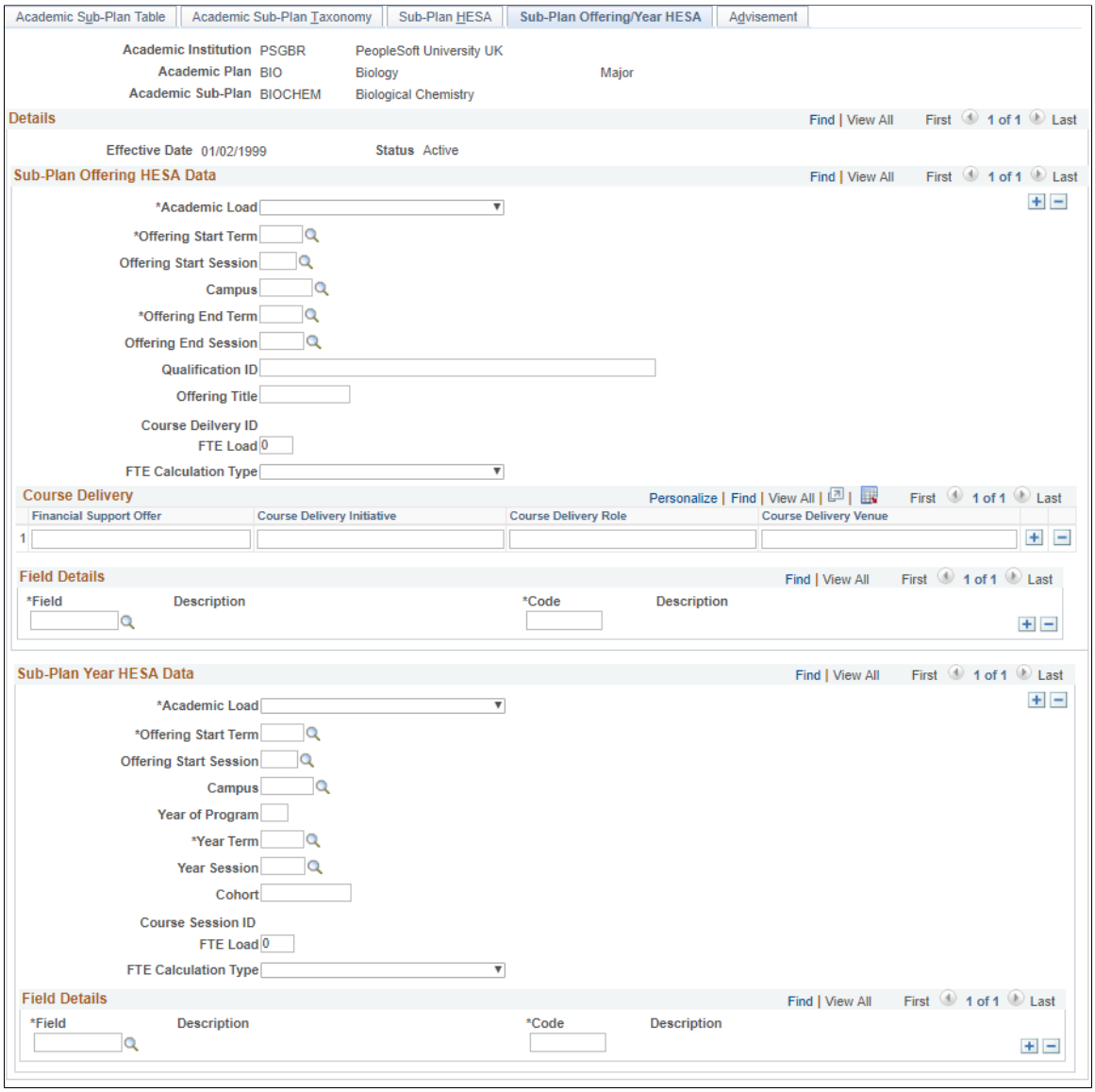
Image: Sub-Plan Offering/Year HESA page

This example illustrates the fields and controls on the Sub-Plan Offering/Year HESA page . You can find definitions for the fields and controls later on this page.



Group boxes on this page are similar to the group boxes on the Plan Offering/Year HESA page and Program Offering/Year HESA page.

Use the Sub-Plan Offering/Year HESA page to enter fields and corresponding values that you did not define at the plan offering/year or program offering/year levels.

Creating HESA Modules

Access the Create HESA Module Data page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Create Module).

The Create HESA Module Data process creates HESA Module Data records for active course offerings. The HESA Module Data record is created with an effective date equal to the latest effective date of the course offering record and the Report to HESA column set to *Yes*.

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The process ignores course offerings that already have a corresponding HESA Module Data record.

Note: The Create HESA Module Data process does not allow you to create dummy module data records. Use the HESA Dummy Module Data page to manually create a dummy module data record.

Processing Steps

The Create HESA Module Data process examines each distinct course offering record of the institution.

If you do not select a Reporting Period parameter, the process creates HESA Module Data records as described in the following steps:

1. The process selects the current effective dated record of the course offering (that is, the process selects the most recent effective dated record on or before system date). This is to check whether the course offering is active at the time the process is run. For example, let us suppose two effective dated records exist for a course offering CALCULUS 1. One is dated August 01, 2008 and the other is dated August 01, 2009. If you run the Create HESA Module Data process on August 03, 2009, the process selects the CALCULUS 1 course offering record dated August 01, 2009.

2. If the selected course offering record status is inactive, the process does not create HESA Module Data records.

3. If the selected course offering record is active:

   a. The process selects the earliest active effective dated record for the course offering. For example, in step 1 the process had selected a course offering record dated 02, August, 2009. If we assume that the course offering CALCULUS 1 has also got effective dated records dated 01 July, 2008 and 01, July 2009, the process selects the record dated 01 July, 2008.

   b. If a HESA Module Data record does not exist for the selected record, the process creates a new record using the selected record. The process sets the Report to HESA value to *Y*.

   c. If a HESA Module Data record exists, the process stops processing that course offering record.

If you select a Reporting Period parameter, the process creates new HESA Module Data records and new effective dated rows for the reporting period as described in the following steps:

1. The process selects the earliest effective dated record relevant to the reporting period for the course offering (that is, the process selects the earliest effective dated record between the reporting period start and end dates). For example, let us suppose that the reporting period is 2008-09 and for a course offering General Accounting, two effective dated records exist. One is August 01, 2008 and the other is November 01, 2008. In this case, the process selects the course offering record dated August 01, 2008.

   If an effective dated course offering record does not exist in the reporting period, then the process does not process the record.

2. If the selected course offering record is active and:

   a. If an existing HESA Module Data record does not exist, the process creates a new record using the effective date of the selected course offering record. The process sets the Report To HESA value to *Y*.

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b. If a HESA Module Data record exists with an effective date in the reporting period, the process stops processing that record.

c. If a HESA Module Data record with an effective date after the reporting period exists, the process updates the effective date of that record and any child field records using the effective date of the selected course offering record.

d. If a HESA Module Data record with an effective date before the reporting period exists, the process creates a new effective dated row using the HESA Module Data record and the effective date of the selected course offering record. The process also copies any existing child Module field records of the HESA Module Data record to the new effective dated HESA Module Data record.

3. If the selected course offering record is inactive, the process stops processing. Note that the process derives the active and inactive status value from the parent Course Catalog record of the course offering.

Entering HESA Data for a Module

Bundle 52.

- Subject is now optional in HESA Subjects.
- The same 3-digit Cost Centre codes for COSTCN are used in DF as for the Student return.
- The derivation logic aggregates multiple records for a Cost Centre into a single entity.

Access the HESA Module Data page (Curriculum Management > Course Catalog > HESA Module Details).

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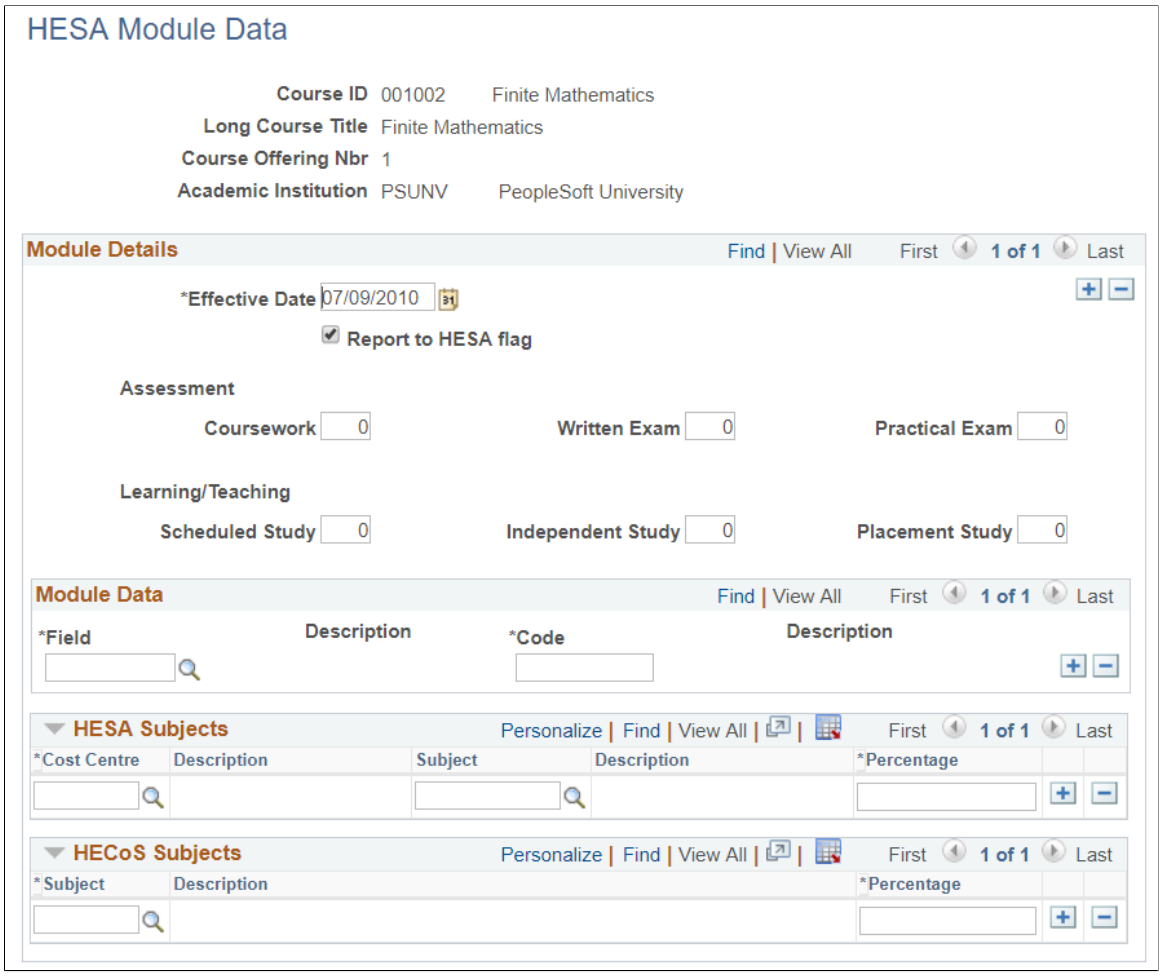
Image: HESA Module Data page

This example illustrates the fields and controls on the HESA Module Data page. You can find definitions for the fields and controls later on this page.



In the HESA Module Data page:

- For each course stage, use the Module Details group box to enter weighted averages (by FTE) in the six percentage fields. These KIS Course Stage fields also exist in the Course Stages region of the Program, Plan and Sub-Plan HESA data pages. For more information, refer to the ‘Entering HESA Data for an Academic Program’ topic in this section.

  Note: These values are no longer required because the Course Stage entity has been removed from the Unistats return.

- Use the Module Data group box to enter Module and Student on Module entity fields and their associated values.

- Use the HESA Subjects group box to enter values that the system uses for deriving HESA Subject entity fields. You can enter a maximum of 16 subjects. The Subject/Cost Centre Percentage for all module subject records must equal 100.

You can manually add a HESA Module Data record for a course offering using the HESA Module Data page in add mode. However, if you want to create multiple HESA module data records for course offerings, use the Create HESA Module Data process.

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HECoS Subjects

This group box is the same as the group box in Plan HESA Data page, except it does not have the ITT Subject field.

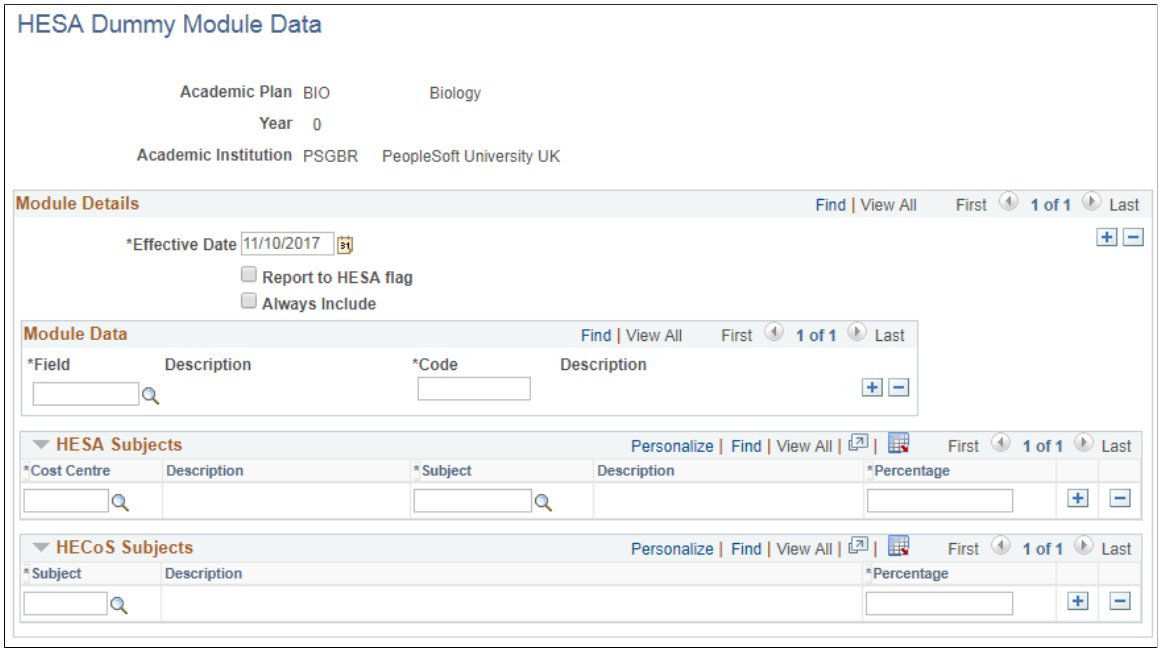
You can define a maximum of three subjects.

Entering HESA Data for a Dummy Module

Access the HESA Dummy Module Data page ((Curriculum Management > Course Catalog > HESA Dummy Module Details).

Image: HESA Dummy Module Data page

This example illustrates the fields and controls on the HESA Dummy Module Data page. You can find definitions for the fields and controls later on this page.



You can manually add a HESA dummy module data record using the HESA Dummy Module Data page in add mode. The system uses the HESA dummy module data record to create a dummy module in the Student On Module entity. This dummy module represents the year of program for active Research and Placement students who do not have any class enrollments

Always Include

Select this check box to report the dummy module in the Student on Module entity together with any eligible class enrollments for the students.

If this check box is not selected, the dummy module is reported *only* if the student does not have any class enrollments being reported in the Student on Module entity.

HECoS Subjects

This group box is the same as the group box in HESA Module Data. You can define a maximum of three subjects.

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Creating HESA Instance and Person HESA Data Records for Students

Access the Create HESA Instance page (Records and Enrollment > HESA Reporting > HESA Returns Setup > Create Instance).

The Create HESA Instance process examines student program/plan records and determines whether there is a related HESA Instance record for a student. If a student does not have an Instance record, the process creates a new HESA Instance record using the Effective Date of the MATR or ACTV row in the Student Program/Plan stack record and sets the Report to HESA internal setting to *Yes* for the student. The process first selects the MATR row and creates a HESA record with that effective date. If a MATR row does not exist, the process selects the row with program action ACTV and creates a HESA record with that effective date.

The process automatically populates the Instance Identifier field value to the HESA Instance record. The NUMHUS derivation logic considers the Instance Identifier value. The process also creates the Person HESA Data record if it does not already exist for the student.

The process generates the Instance Identifier based on the Academic Career, Student Career Number, and Entry Year of the student. The system determines the Entry Year based on the reporting period and the effective date that is used to create the HESA Instance record. The system selects the Reporting Year value of the HESA reporting period that the effective date falls within and uses the year value for Entry Year. For example, an effective date of September 20, 2008 falls within the 2008/09 reporting period, which has a reporting year value of 2008, so Entry Year would be 2008. If the student's career details are Career = UGRD, Career Number = 0, and effective date = September 20, 2008, then the process creates an Instance Identifier of UGRD02008.

Year of Student (YEARSTU) defaults to 1, and Year of Program is set to either the Year of Program value in the same Student Program/Plan record used for Effective Date or a default value of 1.

Academic Career, Academic Program, Academic Plan, Academic Sub-Plan	Select values as needed to generate the HESA Instance records for students with the selected career, program, plan, or subplan.
Start Date	Enter a date so that only students who matriculated on and after this date are included by the process. If the Update Registration Number check box is selected, you must enter a Start Date.
Update Registration Number	Select to update existing HESA instance records where the Registration Number is zero and the earliest effective-dated row is on or after the Start Date. The system updates the registration number to 1 for the most recent effective-dated record.

Student Override

Student Override	Select if you want to generate HESA Instance records for the IDs selected in the EmplID field. If you select the Student Override check box, the process ignores any values entered in the Academic Career, Academic

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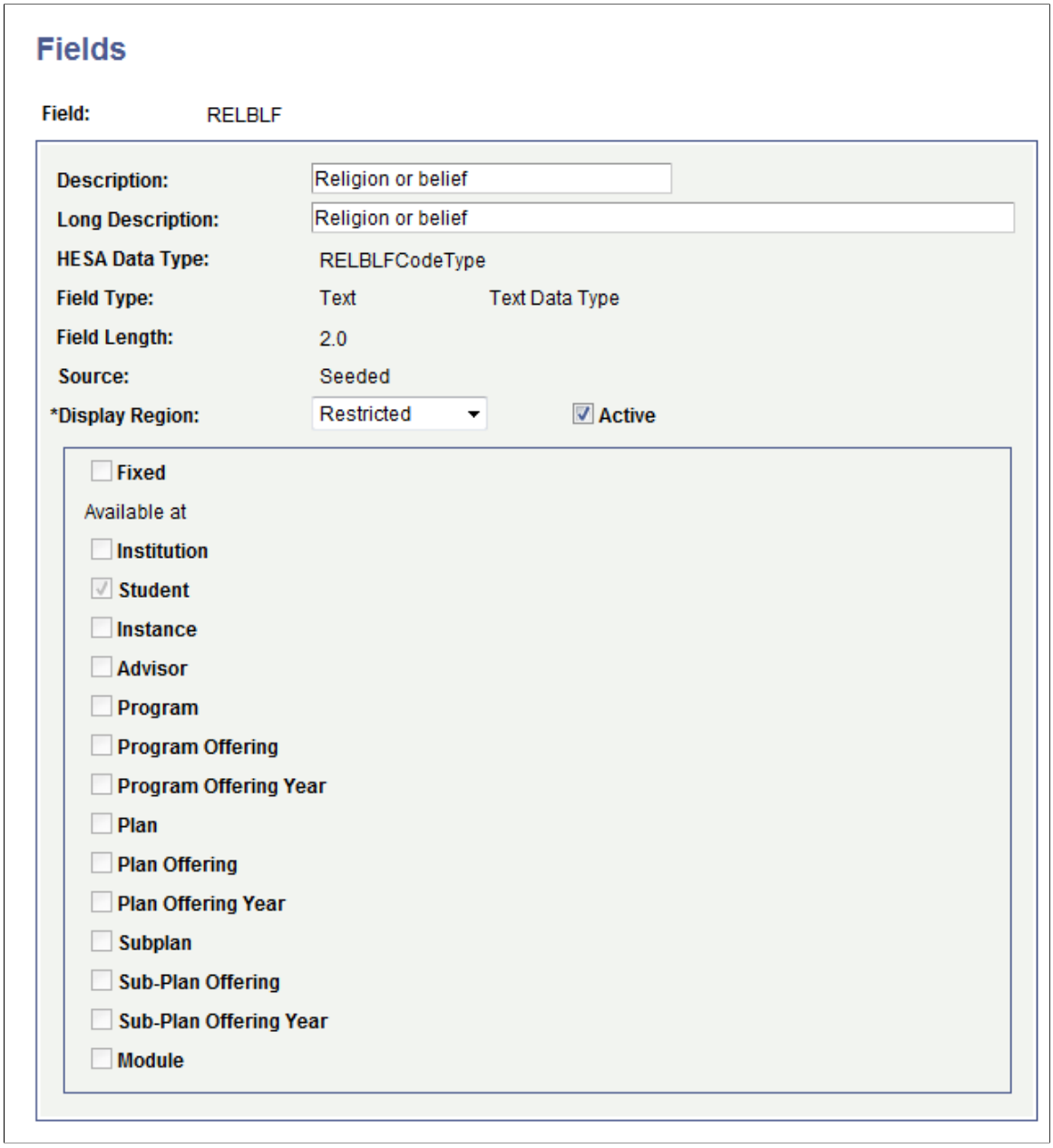
	Program, Academic Plan , Academic Sub-Plan, and Start Date fields.
EmplID (employee ID)	Enter the IDs of one or more students for whom the process must create the Instance data.

Restricting Access to Person HESA Data Fields

Access the Fields page (Records and Enrollment, >HESA Reporting >HESA Returns Setup >Fields).

Image: Fields page

This example illustrates the fields and controls on the Fields page. You can find definitions for the fields and controls later on this page.



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To restrict access, select a value for the Display Region field if the system has selected the Available at check box for Student. The Display Region field remains read-only for all other fields.

Display Region

This field is available for edit only if the system has selected the Available at check box for Student level data capture. Three values are delivered: *Restricted*, *Other* and *Not Displayed*.

If you select *Other*, the field will be available only on the HESA Student Data page where you can capture the field's value.

If you select *Restricted*, the field will be available only on the HESA Restricted Data page where you can capture the field's value.

If you select *Not Displayed*, you cannot capture any new values for the field on the HESA Student Data page but the page will continue to display any existing values for the field.

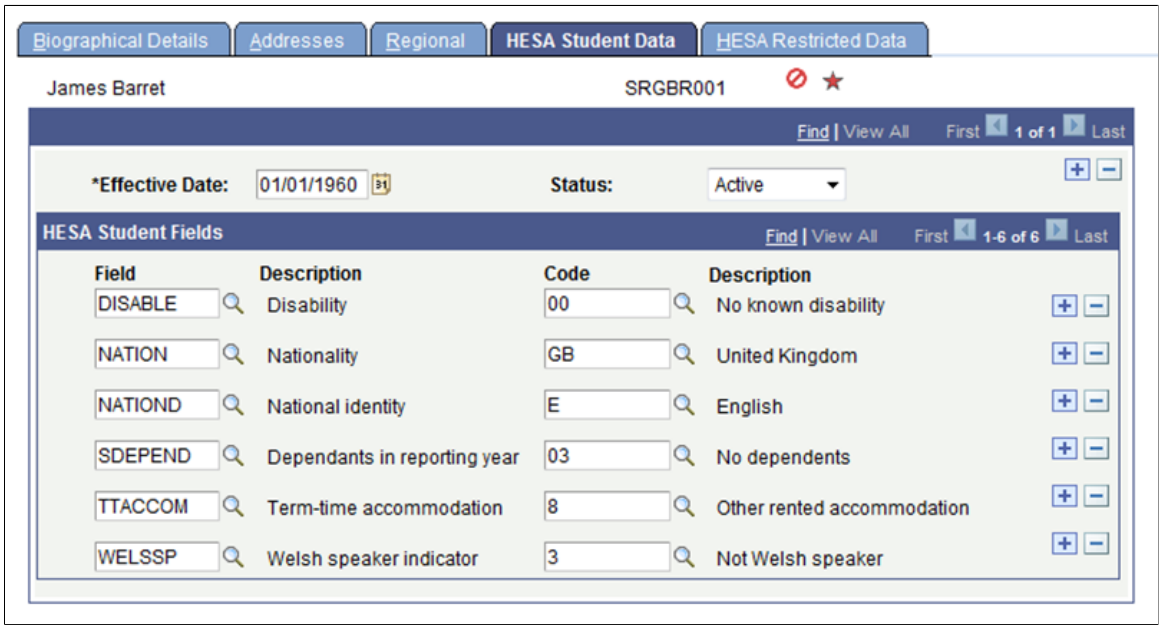
You can restrict the following delivered fields: DISABLE, ETHNIC, GENDERID, NATION, NATIOND, RELBLF, SDEPEND, SEXORT, TTACCOM, TTPCODE and WELSPP.

Entering HESA Data for a Person

Access the HESA Student Data page (Campus Community > Personal Information > Add/Update a Person > HESA Student Data).

Image: HESA Student Data page

This example illustrates the fields and controls on the HESA Student Data page. You can find definitions for the fields and controls later on this page.



Use the HESA Student Data page to enter fields and their corresponding values at the student level.

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You can manually add a Person HESA Data record using the HESA Student Data page in add mode. However, if you want to create multiple Person HESA Data records with instance records, use the Create HESA Instance process.

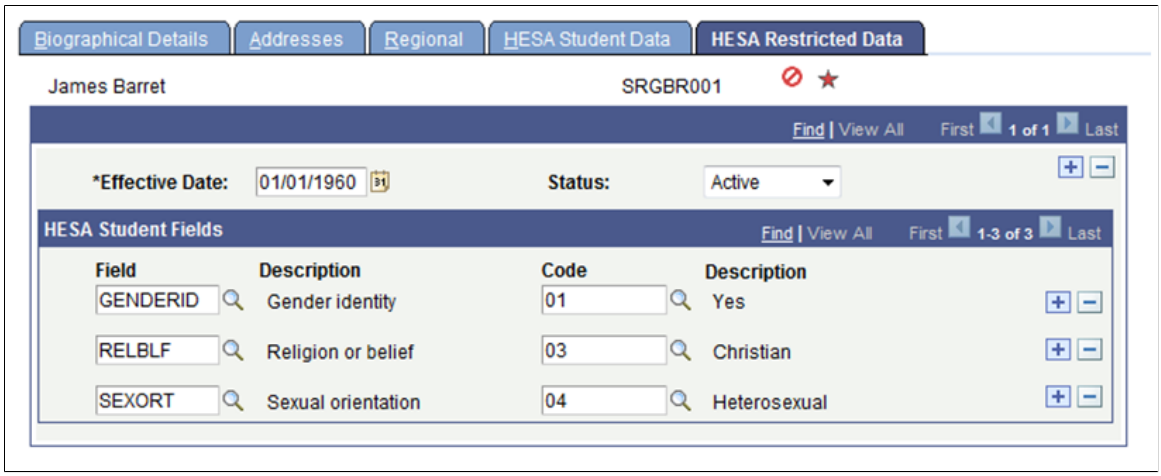
Note: On this page, you can select only those fields for which the Display Region is set up as *Other* on the Fields page. The fields that have Display Region as blank will be displayed on this page if they have any values but you cannot select those fields.

Entering Restricted HESA Data for a Person

Access the HESA Restricted Data page (Campus Community >Personal Information >Add/Update a Person >HESA Restricted Data).

Image: HESA Restricted Data page

This example illustrates the fields and controls on the HESA Restricted Data. You can find definitions for the fields and controls later on this page.



On this page, you can select only those fields for which the Display Region is set up as *Restricted* on the Fields page.

Access to the HESA Restricted Data page can be controlled through the PeopleTools Permission List setup:

- Menu Name: CC_BIO_DEMO_DATA – Bio/Demographic Data
- Component Name: SCC_BIO_DEMO – Add/Update a Person

Entering HESA Instance Data for a Student

Access the HESA Instance page (Records and Enrollment > Career and Program Information > HESA Instance Details > HESA Instance).

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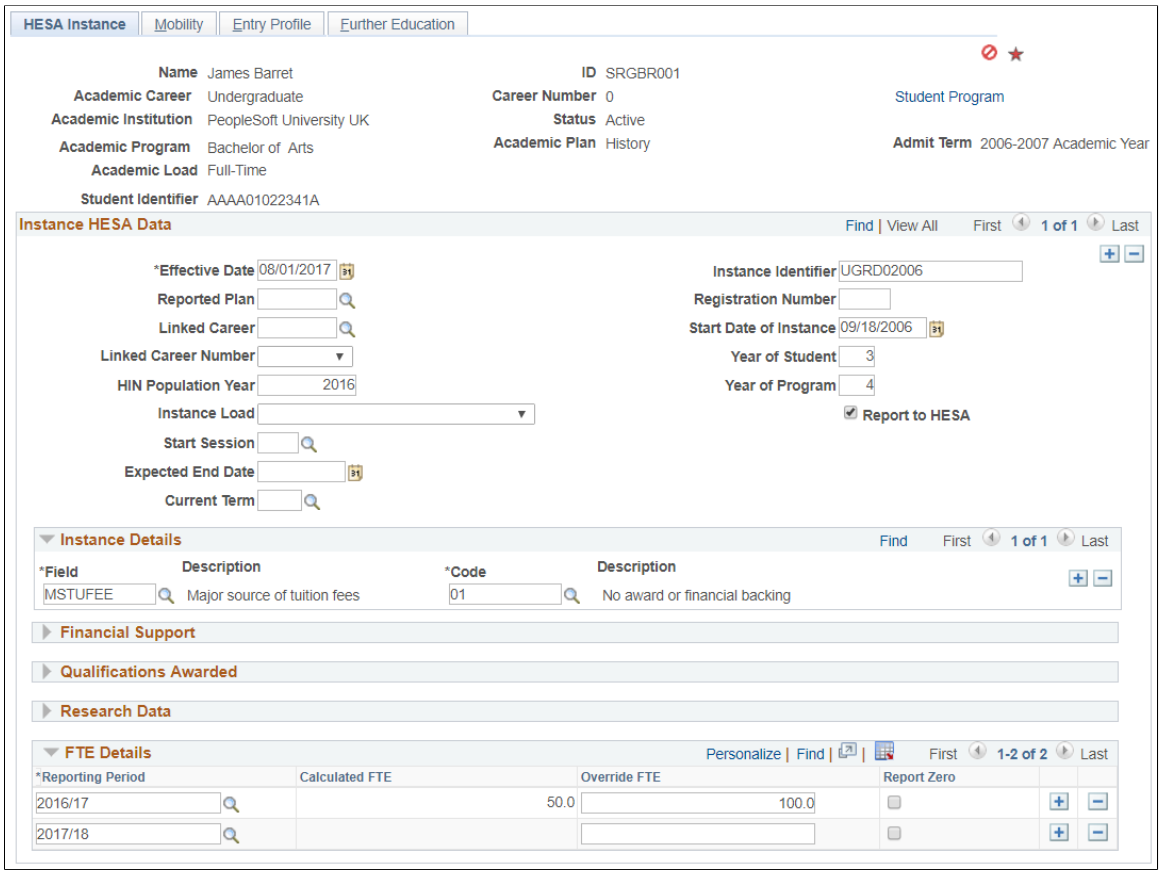
Image: HESA Instance page

This example illustrates the fields and controls on the HESA Instance page . You can find definitions for the fields and controls later on this page.



This page is available for a student if you have created a HESA Instance record for the student. Use the Create HESA Instance page to create HESA Instance records for a group of students. You can also manually create a HESA Instance record for a student using the HESA Instance page in add mode.

Student Identifier

This is a read-only field that displays either the student's current SID or HUSID.

The combination of this value and Instance Identifier (NUMHUS) is used as the unique key for the Engagement entity.

Bundle 52.

In the Instance Details region, these fields are available: SDEMPLOY, SDLEAD.

Instance HESA Data

Instance Identifier

Displays the value generated by the Create HESA Instance process when it creates a HESA Instance record. You can manually enter or modify this value. The system uses this value to derive NUMHUS.

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Reported Plan	Select the primary plan to be used for HESA reporting if the student has more than one active plan.
Registration Number	This field displays 1 for new instance records. The system uses the value in this field and Instance Identifier to ensure the combination is a unique ID for the institution.
Start Date of Instance	Displays the date generated by the Create HESA Instance process. You can manually enter or modify this value. The system uses this value to derive the Instance.COMDATE (Student return) and Student.COMDATE (ITT return).
Year of Student	Displays the value generated by the Calculate Year of Student process. You can manually enter or modify this value. The system uses this value to derive the Instance.YEARSTU field (Student return) and Student.YEARSTU field (ITT return).
Year Of Program	Enter a value that the system uses to derive the Instance. YEARPRG field (Student return) and Student.YEARPRG field (ITT return).
Linked Career and Linked Career Number	Select a career to link this Instance to previous careers. The system treats all the linked careers for a student as a single Instance for HESA reporting.
HIN Population Year	Displays the value entered by the Import HIN Target List process. You can edit the value, if required. The Create Extract process uses the HIN Population Year value to determine which Instance entities to include in the return. If the HIN Population Year matches the reporting year of the reporting period, then the process automatically includes the Instance entity of the student regardless of other criteria (such as whether the Report To HESA is selected). Examples of valid HIN Population Year values include *2008* (for 2008/09 reporting) and *2009* (for 2009/10 reporting).
Instance Load	(Optional) Use this field to override the academic load value from Student Program. For example, if the student a repeating part-time student but is still on a full-time program *and* the Academic Load in Student Program is set to part-time, the Instance Load field can be set to full-time to ensure the student is still associated with a full-time Course Delivery.
Start Session	(Optional) Use this field to override the earliest start session that is selected from the student enrollment records. You can also use this field to define non-standard start sessions where there are no related enrollment records.

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Expected End Date (Optional) Use this field to allow a specific end date to be defined where the date is different from the expected end date that is reported for the student's Course Delivery.

Current Term (Optional) Use this field to override he current term that is selected from the term activation records.

Report To HESA Select to report the Instance to HESA. If the check box is cleared, the Create Extract process does not create a return extract for the instance.

Financial Support

The page displays the Financial Support region if you have selected the Show Financial Support region check box on the HESA Configuration page. The system uses the values that you enter in this region to create the Financial Support entity.

ITT Placement

This region appears if you select the Show ITT Placement region check box on the HESA Configuration page. You can define a maximum of five records. The School and Start Date combination must be unique.

Research Data

Bundle 52.

- REF Unit is renamed to REF Unit 2014.
- New optional field, REF Unit 2021, and its corresponding Description field.

In the Research Data group box, the combination of REF Unit, RAE Unit, and Collaborating Provider must be unique and at least one value must be defined (either REF Unit or RAE Unit) along with Percentage to save a record.

Collaborating Provider To record the same REF Unit for your institution as well as a collaborating provider, leave this field blank for your institution's records, and enter a value for the collaborating provider's records.

FTE Details

Calculated FTE Displays the value calculated by the Calculate Full-Time Equivalence process.

Override FTE Enter a value to override the Calculated FTE.

Report Zero Select to report zero in STULOAD rather than the Calculated FTE or Override FTE values

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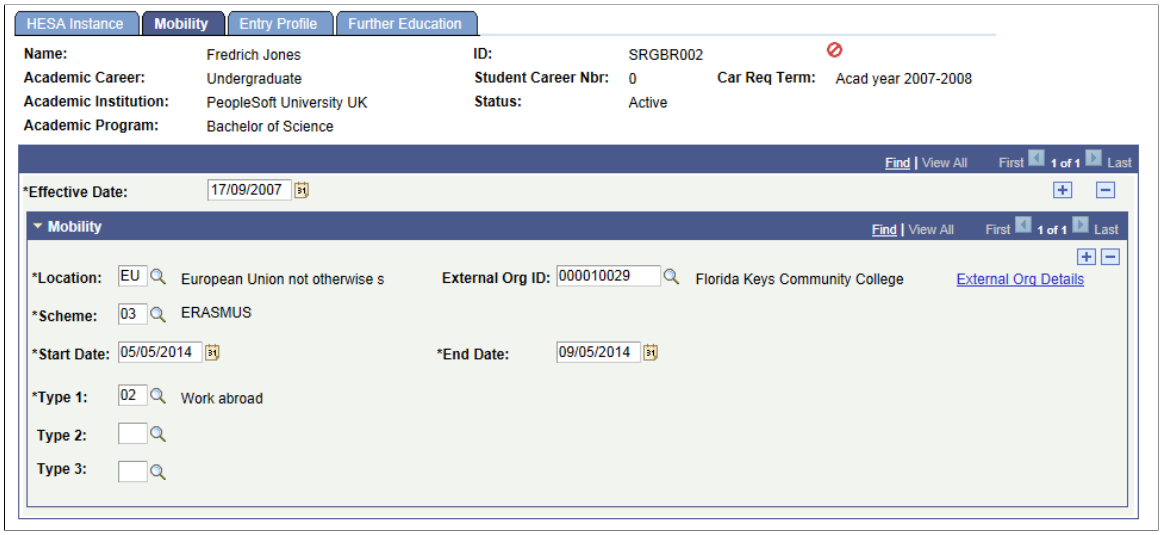
Entering Mobility Data for a Student

Access the Mobility page (Records and Enrollment >Career and Program Information >HESA Instance Details >Mobility).

Image: Mobility page

This example illustrates the fields and controls on the Mobility page. You can find definitions for the fields and controls later on this page.



The combination of Location, Scheme and Start Date must be unique.

External Org ID You can enter an External Organization ID if you want to record the exact location of the student.

Type 1 Select a MOBTYPE code.

Type 2 Select a MOBTYPE2 code.

This field becomes available only if you have selected a value for the Type 1 field. The Type 2 and Type 1 values cannot be the same.

Type 3 Select a MOBTYPE3 code.

This field becomes available only if you have selected a value for the Type 2 field. The Type 3, Type 2 and Type 1 values cannot be the same.

Entering HESA Entry Profile Data for a Student

Access the Entry Profile page (Records and Enrollment > Career and Program Information > HESA Instance Details > Entry Profile).

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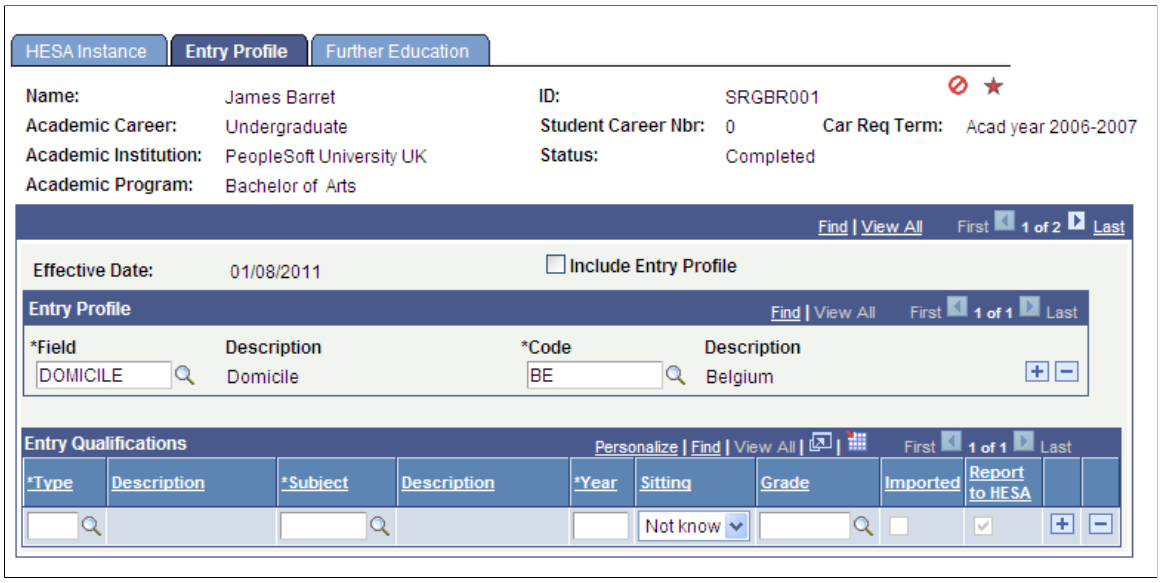
Image: Entry Profile page

This example illustrates the fields and controls on the Entry Profile page. You can find definitions for the fields and controls later on this page.



Include Entry Profile

Select if want an entry profile to be created when the Start Date of Instance is before the start of the reporting period.

If the Start Date of Instance is in the reporting period, you need not select this check box. The Extract process automatically creates an entry profile when the Start Date of Instance is equal to or after the start date of the reporting period, regardless of whether you select or clear this check box.

Note: The Create HESA Instance process clears the Include Entry Profile check box, when it creates a new HESA instance record.

Imported

Indicates whether the data was imported from UCAS.

Report To HESA

Select to include the record in the Qualifications On Entry entity.

Note: If grades are not mapped to a particular qualification type on the Entry Qualification Mapping page, then all the grades are available for a qualification type. If you have done a Entry Qualification mapping, the lookup for the Grade field displays only the mapped grades for a type.

Entering Further Education Data for a Student

Access the Further Education page (Records and Enrollment >Career and Program Information >HESA Instance Details >Further Education).

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Bundle 52.

The Employment Status region, new optional field: Agreement ID. This is used to derive LearnerEmploymentStatus.ILRAGREEID.

Note: Workplace Postcode is no longer used.

Image: Further Education page (1 of 2)

This example illustrates the fields and controls on the Further Education page (1 of 2). You can find definitions for the fields and controls later on this page.

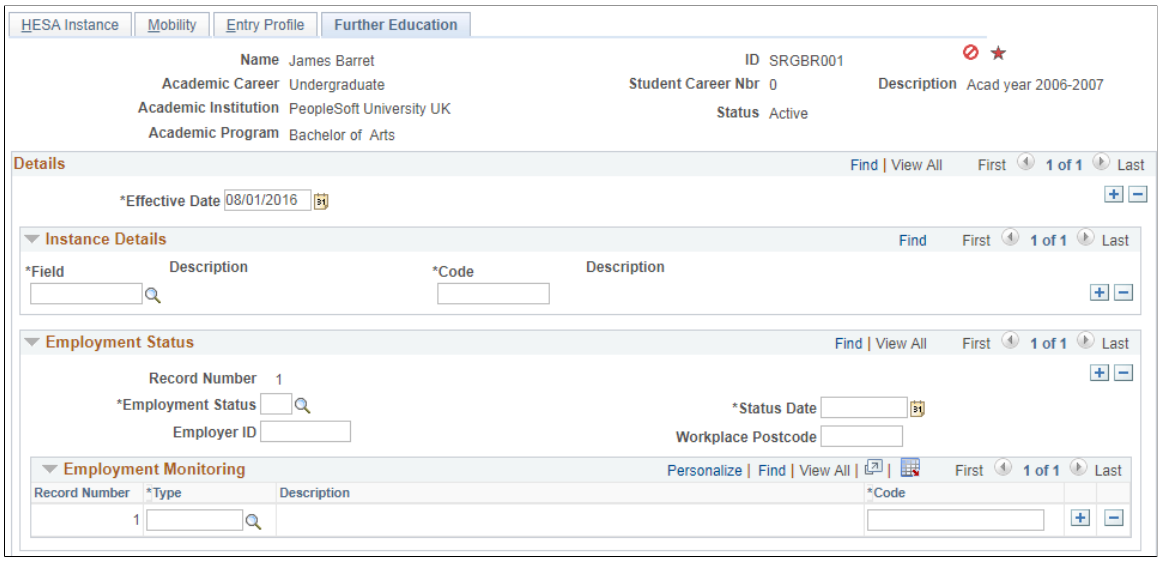
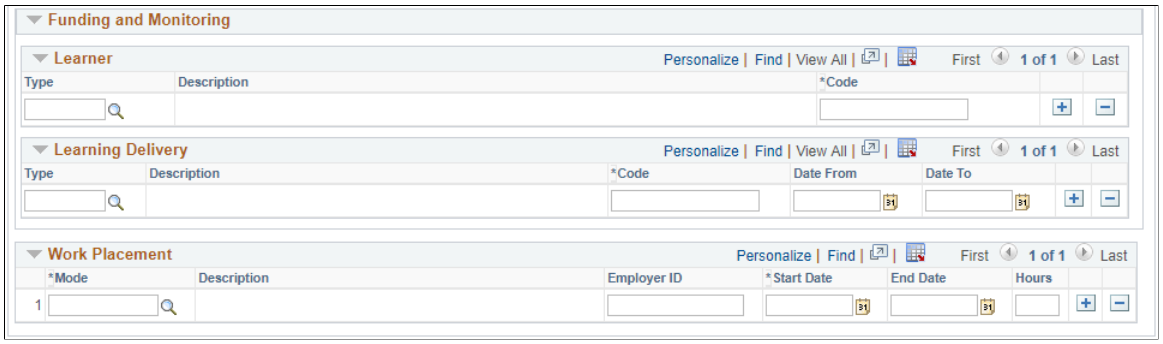


Image: Further Education page (2 of 2)

This example illustrates the fields and controls on the Further Education page (2 of 2). You can find definitions for the fields and controls later on this page.



The system displays this page only if you have selected the Enable Further Education page check box on the HESA Configuration page.

Work Placement

The values in this region are used to derive the Learning Delivery Work Placement entity in the Student Return.

Mode Select the type of work placement.

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Employer ID	Optional. The value is derived from the Employer ID field in the Employment Status region. Alternatively, you can use this field to record the employer number from the Employer Data Service (EDS).
Start Date	Select the date that the work placement started.
End Date	Select the date that the work placement ended.

Note: The combination of Mode, Employer ID, and Start Date must be unique. Employer ID can be blank.

Calculating Year of Student Values for Students

Access the Calculate Year of Student page (Records and Enrollment > HESA Reporting > Extract Processing > Calculate Year of Student).

Increment Year of Program	Select to increment the Year of Program value by one when the Calculate Year of Student process creates a new effective dated HESA Instance record for the reporting period.
Student Override	Select to specify single or multiple students for whom the process should calculate YEARSTU.
Copy Instance Details	Select to have the process copy instance records from the previous effective-dated HESA Instance record.
Copy Qualifications Awarded	Select to have the process copy qualifications awarded records from the previous effective-dated HESA Instance record.
Copy Research Data	Select to have the process copy research records from the previous effective-dated HESA Instance record.
Copy FTE Details	Select to have the process copy FTE records from the previous effective-dated HESA Instance record.

The process calculates the value that the system uses to derive the Instance.YEARSTU (Year of student on this instance) field in the Student Return. The Instance.YEARSTU value is the number of reporting periods that the student has been active in the instance (including linked previous instances).

The process examines student class enrollments and calculates the number of distinct reporting periods covered by the enrollments. The process creates new effective dated HESA Instance records for the specified reporting period. For example, if a student has a HESA Instance record with an effective date of August 1, 2007 and the process runs for the 2008/09 reporting period, then the system creates a row with a new calculated YEARSTU value and an effective date of August 1, 2008. This enables you to roll forward the HESA Instance records to a new reporting period. If the student already has an effective dated record in the reporting period, then the process updates the YEARSTU value of that record.

Note: The HESA Instance page displays the value that the Calculate Year of Student process has calculated.

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Calculation Steps

The following steps describe how the Calculate Year of Student process selects records and calculates YEARSTU from the selected records:

Step 1: Initial Selection of Records

The process selects HESA Instance records that match the run parameters. For each distinct student career in the HESA Instance records, it selects the latest record with an effective date on or before the reporting period end date only if the Report to HESA setting = Y. If the selected record has Report to HESA setting = N, then the process does not include the record in the calculation even if there are previous effective dated records with the Report To HESA setting = Y. This means, the process selects HESA Instance records that either (a) started prior to the reporting period and there is no effective dated row starting in the reporting period, or (b) started in the reporting period. Depending on the calculated YEARSTU value, it treats the records differently for update in the following steps.

If the latest student program record has a status of COMP and the effective date of that record is before the beginning of the reporting period, then the process assumes that the career has been completed before the reporting period (and has not been reactivated since completion) and the calculation of the YEARSTU for the selected HESA Instance record is skipped.

The process logs a message for each record that is selected.

Step 2: Filter for Active Students

The Calculate Year of Student process calculates and stores a YEARSTU value only if the student has been active in the current reporting period.

To determine the student has been active in the current reporting period, the process performs the following steps:

- The process selects all activated terms for the student career.
- The process determines that the student is active in the current reporting period if there is at least one class for any of the selected terms that satisfies the following conditions:
    - Class Start Date is within the reporting period, or Class End Date is within the reporting period, or Class Start Date is prior to the reporting period and Class End Date is after the reporting period.
    - Status = *Enrolled* or *Dropped.*
    - Units Taken value is greater than zero.
    - Grading basis value matches one of the values defined in the Grading Basis Inclusion region with the Year of Student check box selected on the HESA Configuration page.
    - Repeat Code value is null or does not match a value defined in the Repeat Code Exclusion region with the Year of Student check box selected on the HESA Configuration page.
    - If the student has multiple careers with the same Academic Career value as the career being processed (that is, the same career value with different career numbers), then the process applies a further filter to the class enrollments. In that case, the process selects the class only if the program value of the enrollment record matches one of the program values in the Student Program records for that career and career number.

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When the process considers class start and end dates for class enrollments where the Session = *OEE* (open entry/exit), rather than selecting the class start/end dates, the process selects the values from the Student OEE Enrollment Data record for the class enrollment. If the end date is not defined in Student OEE Enrollment Data then the process uses the class end date. The start date is mandatory for a Student OEE Enrollment Data record. Note that the process uses this same OEE logic when it examines class enrollments in the next step (the next step is Step 3, Calculate YEARSTU).

The process does not consider previous linked careers because it assumes that linked careers will only have been active prior to the current reporting period.

In cases where the student has multiple careers, the process does not consider class enrollments that occur before the effective date of the HESA Instance record unless the Instance is linked to a previous career. The selection of activated terms considers only those terms that overlap the Instance, that is where the term begin date is greater than the earliest effective date of the HESA Instance record. The only exception to this rule is where a Linked Career and Career Number are defined for the HESA Instance record in which case the process also considers terms related to that other career.

For each Instance where the student has not been active for the reporting period, the process logs a message and the process skips to the next selected record.

For each active Instance, the process logs a message and calculates the total YEARSTU.

Note that this method of selection does not include active students who do not have any class enrollments (for example, research students).

Step 3: Calculate YEARSTU

For each student who is active in the reporting period, the Calculate Year of Student process uses the following selection method to calculate the year of student value: The process selects distinct activated terms for the Student Career. If the Instance has been linked to a prior Student Career using the Linked Career and Linked Career Number fields in the HESA Instance record, then the process also selects activated terms for the previous career with enrollments.

From the selected terms, the student must have at least one class enrollment that satisfies the following conditions:

- Class Start Date is within the reporting period, or Class End Date is within the reporting period, or Class Start Date is prior to the reporting period and Class End Date is after the reporting period.
- Status = *Enrolled* or *Dropped.*
- Units Taken value is greater than zero.
- Grading basis value matches one of the values defined in the Grading Basis Inclusion region with the Year of Student check box selected on the HESA Configuration page.
- Repeat Code value is null or does not match a value defined in the Repeat Code Exclusion region with the Year of Student check box selected on the HESA Configuration page.
- If the student has multiple careers with the same Academic Career value as the career being processed (that is, the same career value with different career numbers), then the process applies a further filter to the class enrollments. In that case, the process selects the class only if the program value of the enrollment record matches one of the program values in the Student Program records for that career and career number.

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The process then finds out the distinct reporting periods where the class enrollment overlaps (the process considers all delivered active or inactive reporting periods but does not consider any manually added reporting periods). The count of these reporting periods is the year of student value. The process ignores any future reporting periods, that is periods subsequent to the period selected as the run parameter. For example, if the student has only been active in the current (that is, the period selected as the parameter) reporting period then the YEARSTU value is 1, if the student has been active in 2 distinct reporting periods the YEARSTU value is 2.

Step 4: Store the Calculated YEARSTU

The Calculate Year of Student process stores the calculated YEARSTU value in the HESA Instance record as follows.

If the most recent effective dated HESA Instance record has an effective date before the reporting period start date:

1. The process creates a new effective dated record using the reporting period start date. It copies all the data from the following records to the new effective dated record: Header record (SSR_HE_INSTANCE), Entry Profile fields (SSR_HE_INST_FLD where SSR_HE_ENTR_FLAG = Y), Entry Qualifications (SSR_HE_QUAL_ENT), Employment Status (SSR_HE_INST_EST), Employment Monitoring (SSR_HE_INST_MON), Learner (SSR_HE_INST_LRN) and Learning Delivery (SSR_HE_INST_LDL). The Instance Details fields (SSR_HE_INST_FLD where SSR_HE_ENTR_FLAG = N), including the Further Education Instance fields, are copied only if you have selected the Copy Instance Details check box. The Qualifications Awarded (SSR_HE_QUAL_AWD) records are copied only if you have selected the Copy Qualifications Awarded check box. The Research Data (SSR_HE_INST_RES) records are copied only if you have selected the Copy Research Data check box. The FTE Details (SSR_HE_INST_FTE) records are copied only if you have selected the Copy FTE Details check box.

2. The process sets the YEARSTU value to the calculated value.

3. If the Increment Year of Program parameter check box is selected and the existing record has a Year of Program value greater than zero, the process increments the value by one in the new record.

If the HESA Instance record starts within the reporting period, the process inserts the calculated YEARSTU value to the existing record.

The process logs a message to confirm the value has been calculated and stored.

Calculating Full-Time Equivalence for Students

Access the Calculate Full-Time Equivalence page (Records and Enrollment > HESA Reporting > Extract Processing > Calculate FTE).

Student return's Instance.STULOAD is expressed as a percentage of FTE. A student who has been studying full-time for the reporting period has an FTE of 100. A student studying part-time has a value of less than 100 to represent the proportion of full-time study they have undertaken. For example, a student with half the load of a full-time student has a FTE of 50.

An institution can calculate the FTE based on either class enrollments or program load depending on its requirements.

An institution can define a calculation type of either *Derive load from Modules* (that is, calculation based on the student's class enrollments) or *Derive load from Program* (that is, calculation based on the FTE

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load defined for the year or for the program, plan, and subplan) at each data capture level (for example, the Plan HESA Data page for plan level). A default calculation type run parameter is also available to enable institutions to apply the same calculation type to all students of a particular institution, career, or program without the need for defining the calculation type against each program, plan, or subplan.

Academic Career

Select a value to run the calculation process individually for each academic career. This enables your institution to apply a different FTE calculation type, academic calendars and full-time load to each distinct career.

Required to select an academic calendar or academic program.

Note: Do not select a value if you want to run the process for all academic careers in an institution. You should run the process for all academic careers only when the FTE Calculation Type is *Derive load from Modules* for all records.
If the FTE Calculation Type is *Derive load from Program* for any record, then you must select both academic career and academic calendar as the run parameters.

Academic Calendar

Select a value that the process uses for program calculation to determine the start and end dates of terms associated with the calendar that fall within the reporting period. The process uses these dates to apportion load for discontinued students.

Required if the Default Calculation Type is *Derive load from Program.*

Default FTE Calculation Type

Select a default value that the process uses if a calculation type is not defined for the program, plan, or subplan related to the HESA Instance record. Values include *Derive load from Modules* and *Derive load from Program.*

Maximum Calculated Value

Enter the maximum FTE value that the process can calculate. This field enables you to cap the calculated value to a maximum value, typically 100 for full-time students.

Consider Sub-Plans

Select to have the process consider subplan HESA records to determine FTE calculation type and FTE load. You can select a calculation type and enter an FTE load in the Sub-Plan HESA Data page or the Sub-Plan Offering/Year HESA page.

Include Dropped Classes

Select to have the process consider class enrollments with a status of *Dropped* along with class enrollments with a status of *Enrolled.*

Increment Year of Program

Select to have the existing Year of Program value increase by one when the Calculate Full-Time Equivalence process creates a new effective dated HESA Instance record for the reporting period.

Apportion Module Load

Select to have the process reduce the load of class enrollments for students who have discontinued, left, or cancelled.

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	The process considers the selection or de-selection of this check box only when the derived calculation type is *Derive Load from Modules.* The process always reduces the load for discontinuation if the calculation type is *Derive load from Program.*
Student Override	Select to specify single or multiple students for whom the process should calculate FTE.

Note: If you want to use calculation type or FTE load values at *Offering* or *Year* levels, then you must ensure that the Year of Program values in HESA Instance records are verified and updated before the FTE calculation process is run.

The process determines the calculation type from the student's year, program, plan, or subplan. If no values exist in the data capture pages, it uses the default calculation type run parameter. After the process determines the calculation type, the calculation is done based on either the FTE Load defined in the data capture pages or class enrollments. For calculation based on program load, an adjustment is made if the student has discontinued before the end of the academic calendar.

The process initially selects each HESA Instance record that matches the process parameters. It selects the latest effective dated record with an Effective Date on or before the reporting period end date only if the Report to HESA setting = Y. If the selected record has Report to HESA setting = N, then the process does not include the record in the calculation even if previous effective dated records exist with the Report To HESA setting = Y. For each selected Instance, the process determines if the related Academic Career has at least one activated term overlapping the reporting period or at least one class enrollment overlapping the reporting period. If the relevant activated term or class enrollment does not exist for the student, then the process logs a message and skips processing the instance.

While determining if any classes overlap the reporting period, if the class enrollment has a Session = *OEE* (open entry/exit), rather than selecting the class start/end dates, the process selects the values from the Student OEE Enrollment Data record for the class enrollment. If the end date is not defined in Student OEE Enrollment Data then the process uses the class end date. The start date is mandatory for a Student OEE Enrollment Data record. Note that the process uses this same OEE logic when it examines class enrollments in the following step 3, *If the FTE calculation type is Derive load from Modules.*

Calculation Steps

The following steps describe how for each selected instance the Calculate Full-Time Equivalence process calculates the FTE for the specified reporting period run parameter:

Step 1: Determine the Academic Career details

The process selects the following values from the associated academic career by selecting the most recent effective dated Student Program/Plan records that start on or before the reporting period end date:

- Academic Program
- Academic Load (Approved Academic Load)
- Academic Plan
- Academic Subplan

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If multiple plans exist, then the process refers to the HESA Instance record to determine which plan to use. If plan is not defined, then it uses the plan with the lowest Plan Sequence value.

If multiple subplans exist with the Report to HESA setting = Y, then the process selects the subplan with the most recent Declare Date within the reporting period. If multiple records exist with the same Declare Date, then the process selects the record with the lowest subplan code ordered alphabetically.

Step 2: Determine the FTE Calculation Type and FTE Load

Bundle 52. Updated steps 1, 2, 4, and 5.

After selecting the program, academic load, plan and subplan, the Calculate Full-Time Equivalence process selects the Year of Program (YEARPRG) value from the HESA Instance record . The process determines the FTE Calculation Type and FTE Load in the following sequence:

1. If Consider Sub-Plans run parameter is selected and the HESA Sub-Plan Offering Year contains the selected subplan, academic load, and year of program, then the process selects the FTE values from the HESA Sub-Plan Offering Year. Only records in SSR_HE_SPLNOYR where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.

2. If Consider Sub-Plans run parameter is selected and the HESA Sub-Plan Offering contains the selected subplan and academic load, then the process selects the FTE values from the HESA Sub-Plan Offering. Only records in SSR_HE_SPLNOFR where Offering Start Term, Offering Start Session and Campus are all blank are considered.

3. If Consider Sub-Plans run parameter is selected and the HESA Sub-Plan contains the selected subplan, then the process selects FTE values from the HESA Sub-Plan.

4. If the HESA Plan Offering Year contains the selected plan, academic load and year of program, then the process selects the FTE values from the HESA Plan Offering Year. Only records in SSR_HE_PLNOFRYR where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.

5. If the HESA Plan Offering contains the selected plan and academic load, then the process selects FTE values from the HESA Plan Offering. Only records in SSR_HE_PLNOFR where Offering Start Term, Offering Start Session and Campus are all blank are considered.

6. If the HESA Plan contains the selected plan, then the process selects FTE values from the HESA Plan.

7. If the HESA Program Offering Year contains the selected program, academic load, and year of program, then the process selects FTE values from the HESA Program Offering Year.

8. If the HESA Program Offering contains the selected program and academic load, then the process selects FTE values from the HESA Program Offering.

9. If the HESA Program contains the selected program, then the process selects the FTE values from the HESA Program.

10. The process selects the Default Calculation Type run parameter value and sets the FTE Load to either 100 (if the calculation type is *Derive load from Program)* or zero (if calculation type is *Derive load from Modules)*.

The following validations apply to the sequence of steps:

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- If the process finds the FTE Calculation Type in any of the steps, it stops processing the subsequent steps. If the FTE Load is not defined, then the process retrieves the Calculation Type from that step, and load is set to zero. For example, in step 3, if the process finds out that the FTE Calculation Type value exists but the FTE Load value does not exist on the HESA Sub-Plan page, then it sets the FTE Load value as zero.
- If YEARPG value is zero or null in the HESA Instance record, then the process does not perform steps that match to Offering Years (Steps 1, 4, and 7).
- The FTE Load value is only required if the calculation type is *Derive load from Program.* If you selected the calculation type as *Derive load from Modules* on the data capture page, then the process automatically sets the FTE Load value as zero.

For each record, the process logs a message indicating the derived FTE Calculation Type and the step that derived the value. .

Step 3: If the FTE calculation type is Derive load from Modules

The Calculate Full-Time Equivalence process selects class enrollments for the student as described in the following steps:

1. The process selects activated terms for the Student Career.
2. From each selected term, it selects classes that satisfy the following conditions:
    - Class Start Date is within the reporting period, or Class End Date is within the reporting period, or Class Start Date is prior to the reporting period and Class End Date is after the reporting period.
    - Status = Enrolled or Status = Dropped (if the Include Dropped Modules check box is selected on the Calculate Full-Time Equivalence page).
    - Units Taken value is greater than zero.
    - Grading basis value matches one of the values defined in the Grading Basis Inclusion region with the FTE check box selected on the HESA Configuration page.
    - Repeat Code value is null or does not match a value defined in the Repeat Code Exclusion region with the FTE check box selected on the HESA Configuration page.
    - If the student has multiple careers with the same Academic Career value as the career being processed (that is, the same career value with different career numbers), then the process applies a further filter to the class enrollments. In that case, the process selects the class only if the program value of the enrollment record matches one of the program values in the Student Program records for that career and career number.

For each class enrollment, the process finds the associated Module HESA Data record that contains the relevant Course ID/Course Offering Number. The process considers the most recent effective dated record where the effective date is not after the reporting period end date.

The process determines the FTE field value for the Module (from Module HESA Data). This value is the class FTE value (that is, Module FTE = Class FTE). If the FTE field value for the Module is not defined, then the process determines the value as zero (that is, Class FTE = 0).

If the Class Start Date is before the Reporting Period Start Date or if the Class End Date is after the Reporting Period End Date (that is, class overlaps more than one reporting period):

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1. Determine the total class days from Class Start Date to Class End Date.
2. Determine the total student days for the reporting period as the number of days from the Class Start Date or Reporting Period Start Date (whichever is the latest) until the Class End Date or Reporting Period End Date (whichever is the earliest).
3. Updated Class FTE = (student days in reporting period / total class days) * Class FTE
4. If the load has been reduced (that is, total student days is less than total class days), log a message indicating that the load for that Course Offering has been reduced.

If the class enrollment status = Enrolled, then the process reduces module load where the student has discontinued or withdrawn, as described in the following steps:

1. The process selects the most recent effective dated row in the Student Program record with effective date on or before the reporting period end date.
2. If the Apportion Module Load run parameter is selected and the Student Program status is Discontinued (DC) or Leave of Absence (LA) or Cancelled (CN), then the process reduces the module FTE as described in the following steps to reflect an early leaving date:
   a. The process determines the Student Leave Date as the effective date of the selected Student Program plan record.
   b. The process determines the Term End Date of the class enrollment.
   c. If the Student Leave Date is null or on or after the Term End Date, then the process does not reduce the load. The process includes the full load in the total calculation.
   d. If the Student Leave Date is before the Class End Date, the process reduces the load described as follows:

      — Determine the total student days in the reporting period from Class Start Date or Reporting Period Start Date (whichever is the latest) until the Student Leave Date (not including the day of the leave date in the total).

      — Determine the total class days in the reporting period from the Class Start Date or the reporting period start date (whichever is the latest) to Class End Date or Reporting Period End Date (whichever is the earliest) .

      — Determine the Class FTE = (student days / class days) * Class FTE.

      — If the load has been reduced (that is, total student days is less than total class days), then log a message to indicate that the load for that Course Offering has been reduced.

If the parameter Apportion Module Load is not selected or status is not DC, LA, or CN, adjustment to the load for the class enrollment is not required.

If the class enrollment status = Dropped, then the process reduces module load for dropped classes based on drop date as described in the following steps:

1. The process determines the Class Drop Date from the class enrollment record.
2. If the Class Drop Date is in the reporting period and before the Class End Date, the process reduces the load described as follows:

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a. Determine the total student days from Class Start Date or Reporting Period Start Date (whichever is the latest) until the Class Drop Date (not including the day of the drop date in the total).

b. Determine the total class days from Class Start Date or Reporting Period Start Date (whichever is the latest) to Class End Date or Reporting Period End Date (whichever is the earliest)

c. Determine the Class FTE = (student days / class days) * Class FTE

If the Class Drop Date is not in the reporting period and before the Class End Date, no reduction is required. Note that the process reduces the load for dropped classes regardless of whether the Apportion Module Load run parameter is selected or cleared. If the Class Drop Date is before the reporting period start date, update Class FTE to zero.

Calculated FTE = total of the individual module FTE values for each class enrollment (that is, FTE for each Module HESA Data record) with adjustments for discontinuation as mentioned above.

The process logs a message confirming the calculated FTE values.

Step 4: If FTE Calculation Type is Derive load from Program

The Calculate Full-Time Equivalence process uses the derived FTE Load as described in the following steps:

1. The process selects the most recent effective dated row in the Student Program record with effective date on or before the reporting period end date.

2. If the status is not Discontinued (DC), Leave of Absence (LA) or Cancelled (CN), then the Calculated FTE = FTE Load.

3. If the status is Discontinued (DC), Leave of Absence (LA), or Cancelled (CN), the process apportions the load according to date of discontinuation/leave/withdrawal as described in the following steps:

   a. The process determines the full teaching period for the Academic Calendar with reference to each of the terms associated with the calendar and the reporting period (that is the term is associated with Academic Calendar run parameter and the Term Begin Date falls in the reporting period). Then, the process sets Teaching Start Date = the earliest Term Begin Date and Teaching End Date = the latest Term End Date.

   b. The process determines the Student Days as being from the Teaching Start Date until the Effective Date of the discontinuation, leave of absence or withdrawal.

   c. The process determines the Teaching Days as being from the Teaching Start Date to the Teaching End Date

   d. Calculated FTE = FTE Load * (Student Days / Teaching Days)

   e. The process logs a message indicating the calculated FTE value after discontinuation or leave of absence.

Step 5: Store the Calculated FTE

The Calculate Full-Time Equivalence process stores the calculated FTE in the HESA Instance record as described in the following steps:

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1. If the Maximum Calculated Value run parameter value is specified and the Calculated FTE value is greater than the parameter value, then the process replaces the Calculated FTE value with the Maximum Calculated Value when the value is stored in the HESA Instance record.

2. If the most recent effective dated HESA Instance record has an effective date before the reporting period start date, the process performs the following steps:

   a. The process creates a new effective dated record using the Reporting Period Start Date.

   b. If the Increment Year of Program run parameter is selected and the existing record has a Year of Program value, then the process increments the Year of Program value by one in the new record.

3. The process selects the most recent effective dated HESA Instance record that starts on or before the reporting period end date (that is, the process selects either the newly created record above or the existing record that starts within the reporting period).

4. If there is an existing FTE record for the reporting period (in PS_SSR_HE_INST_FTE), the process updates the Calculated FTE value of the existing record. The process retains any existing Override FTE and Report Zero setting values.

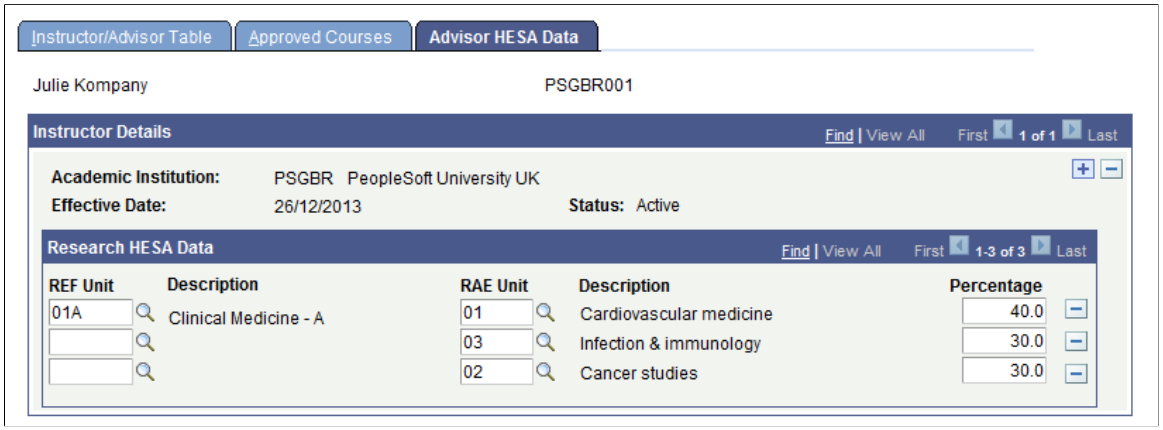
5. If FTE record does not exist for the reporting period, the process creates a new FTE record using the Reporting Period and Calculated FTE values. It sets the Override FTE value to zero and the Report Zero setting is not selected. The process uses the Override FTE value only if the value is greater than zero. The Report Zero check box is provided in the HESA Instance page to allow a zero override to be applied to the extract. If the calculated FTE values is greater than 100 and the institution wants the return STULOAD as 100, then you can use the HESA Instance page to manually add an Override FTE value of 100.

Entering HESA Advisor Data for a Student

Access the Advisor HESA Data page (Curriculum Management > Instructor/Advisor Information > Instructor/Advisor Table > Advisor HESA Data).

Image: Advisor HESA Data page

This example illustrates the fields and controls on the Advisor HESA Data page. You can find definitions for the fields and controls later on this page.



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Bundle 52.

- REF Unit is renamed to REF Unit 2014.
- New optional field, REF Unit 2021, and its corresponding Description field.

You can enter a maximum of six units. The total percentage for the six subjects must equal 100.

The combination of REF Unit and RAE Unit must be unique and at least one value must be defined along with Percentage to save a record.

Collaborating Provider This field is optional. Use this field to record a UKPRN value or one of the generic codes provided by HESA. For example, 4002, 4003, or 4004.

Note: HESA does not provide the UKPRN code in the CodeLists.xsd so a prompt is not available for this field.

Entering DEGEST Value

Access the Regional page (Campus Community > Organization > Create/Maintain Organizations > Organization Table > Regional).

Previous Degree Establishment Enter a value that the system can use derive the Student. DEGEST value for ITT Return

Entering DEGTYPE Value

Access the Degree Table page (Set Up SACR > Foundation Tables > Academic Structure > Degree Table).

Previous Degree Type Enter a value that the system can use to derive the Student. DEGTYPE value for ITT return.

Preparing for Generating DLHE Return

This section provides an overview of processing DLHE return and discusses how to:

- Identify the DLHE target population
- Import the target population
- Import DLHE survey data into staging table
- Review and update imported survey data in staging table
- Use the Survey Link pagelet

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- Add, view, and update surveys

Understanding Preparing for Generating DLHE Return

For Student, Offshore, and ITT returns, an academic institution collects most of the data from the data capture pages. For DLHE returns, an institution collects most of the return data by conducting a survey of the students.

An academic institution can create a DLHE survey return either from their student data or by importing the POPDLHE file. There are numerous ways through which an institution can collect survey data from students, for example:

- By asking the student to complete the online survey.
- By conducting a telephone survey and entering the survey details on behalf of the student.
- By asking the student to complete and return a paper questionnaire and then enter the survey details on behalf of the student.

Also, participants can enter the survey data on the HESA website and HESA provides an XML file that contains this data. An institution can import the survey records from this XML file into a staging table. The institution can then review and edit the imported data before posting to the database.

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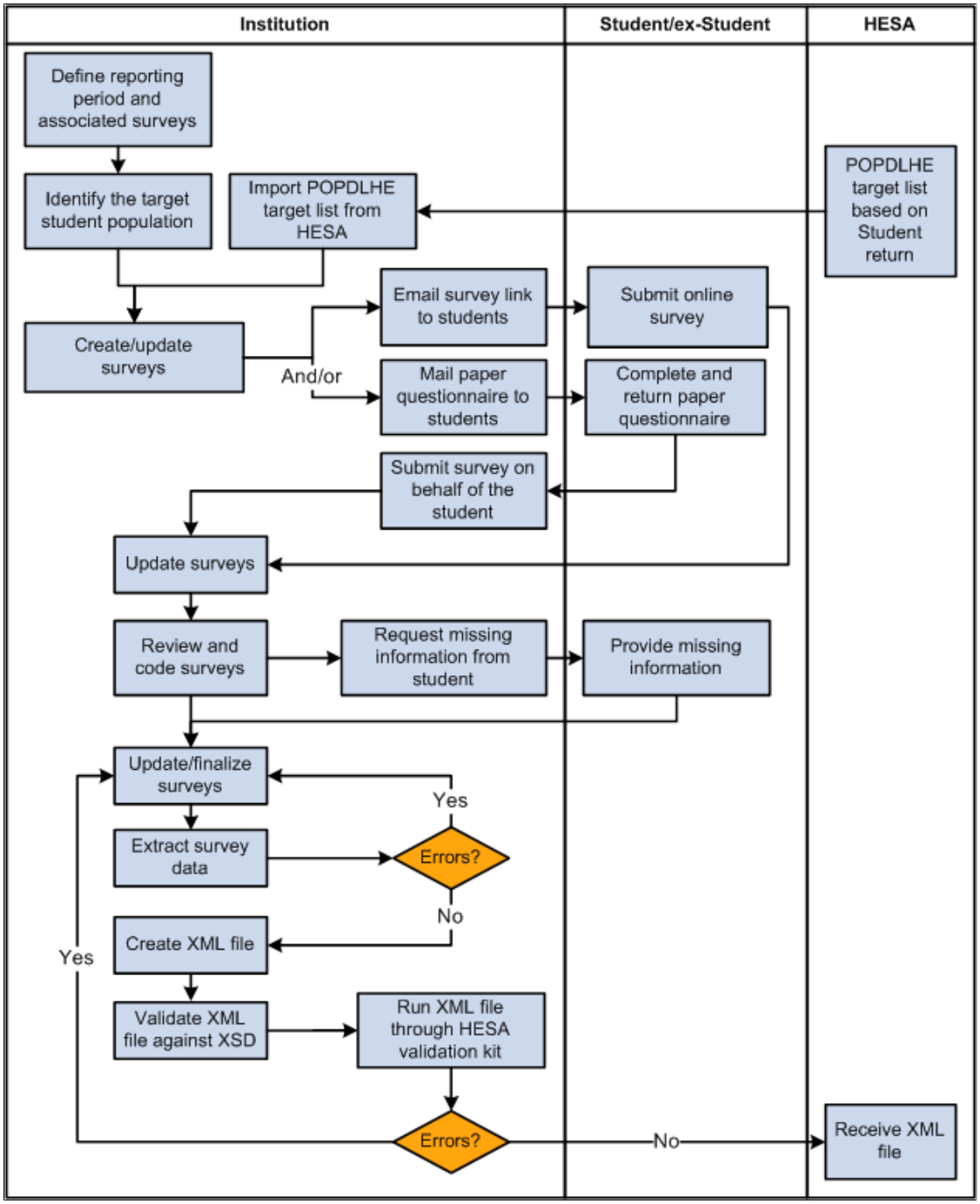
Image: Example for processing the DLHE survey

The following diagram illustrates how an institution can process the DLHE survey:



Related Links

Setting Up a HESA Return

"Understanding DLHE Self-Service Survey" (PeopleSoft Campus Solutions 9.2: Self Service)

"Entering and Submitting the DLHE Survey" (PeopleSoft Campus Solutions 9.2: Self Service)

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Pages Used to Prepare for Generating DLHE Return

Page Name	*Definition Name*	*Navigation*	*Usage*
Identify DLHE Target Population	SSR_HE_TARPOP	Records and Enrollment > HESA Reporting > Destination of Leavers > Identify Target Population	Run the process to create/ update survey records from students' records in your system.
Import Survey Target Population	SSR_HE_IMP_TPOP	Records and Enrollment > HESA Reporting > Destination of Leavers > Import Target Population	Run the process to import the target population.
Import Survey Data	SSR_HE_IMPDLHE_RC	Records and Enrollment >HESA Reporting >Destination of Leavers >Import Survey Data	Run the process to import DLHE survey records from the XML file that HESA provides. The process imports the records into a staging table.
Survey Staging Data	SSR_HE_SURV_STG	Records and Enrollment >HESA Reporting >Destination of Leavers >Survey Staging Data	Review and edit the imported survey data in the staging table.
Survey Management	SSR_HE_SURV_MGMT	Records and Enrollment > HESA Reporting > Destination of Leavers > Survey Management	Allows users to retrieve existing survey records, update the record, navigate to further detailed survey pages, navigate to the self-service survey pages or navigate to add a new survey.
Add a Survey	SSR_HE_SURV_ADD	Click the Add Survey button on the Survey Management page.	Supplementary page to allow users to manually add a new survey record.
Survey Details	SSR_HE_SURV_DTLS	Click the Details button on the Survey Management page.	Supplementary page to view further details of a survey and to add or update coded values required for the HESA extract.

Identifying DLHE Target Population

Access the Identify DLHE Target Population page (Records and Enrollment >HESA Reporting >Destination of Leavers >Identify Target Population).

Survey Select the DLHE Survey translate values of April or January.

Use the Student Override region to specify single or multiple students for whom the process determines eligibility for including in the DLHE survey.

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Processing Steps

The process selects student careers whose latest HESA Instance record has Report to HESA = *Y*.

For each distinct student career for the institution, the process derives the following fields and includes the student in the survey if all of the following criteria are met.

Field	***Derivation Criteria for the Student***
End Date of Instance (Instance.ENDDATE)	The derived value should fall on or between the Qualifying Start Date and the Qualifying End Date for the survey. For the April Survey, the Instance.ENDDATE is between 01-AUG-YYYY and 31-DEC-YYYY, where YYYY is the year element from the start date of the reporting period. For the January Survey, the Instance.ENDDATE is between 01-JAN-YYYY and 31-JUL-YYYY, where YYYY is the year element from the end date of the reporting period.
Mode of Study (Instance.MODE)	The derived value should not equal 63 or 64 or MODE is 63 or 64 and QUAL begins with D or L.
Location of Study (Instance.LOCSDY)	The derived value is null or not *S* (The value *S* means that the student is studying abroad and is included in the Student record because the student has spent or will spend more than 8 weeks in UK).
Exchange Programmes (Instance.EXCHANGE)	The derived value is null or is not one of the following incoming exchange student codes: • *4* (Other incoming exchange or visiting student) • *G* (Incoming ERASMUS student)
Intercalation (Instance.INTERCALATE)	The derived value is null or is not 01.
Qualification Awarded (QUAL)	There must be is at least one derived QUAL value that has a code that is not null or *NULL ERROR* and is not one of the following: L91, M91, H91, I91, M76, H76, I76, J76, M72, H72, I72, C90, D90, E90, H90, I90, J90, L90, M90, or any value beginning P, Q, R, S or X
Reason for Ending Instance (Instance,RSNEND)	The derived value is not 5 or 12.

The following table describes how the process derives the fields listed in the preceding table.

Field	***Derivation Logic***
End Date of Instance (Instance.ENDDATE)	Values are derived for this field as per the Student return.
Mode of Study (Instance.MODE)	Values are derived for this field as per the Student return.

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Field	*Derivation Logic*
Year of Program (Instance.YEARPRG)	A value for this field is derived to derive Instance.LOCSDY and Instance.EXCHANGE. Value is derived for YEARPRG as per the Student return, except the field derivation rules (relating to REDUCEDI and Country) and the use of default and null error steps.
Course Identifier (Instance.COURSEID)	To derive Instance.LOCSDY and Instance.EXCHANGE, the system needs to determine whether the Instance.COURSEID is based upon a subplan or plan.
Location of Study (Instance.LOCSDY)	Values are derived for this field as per the Student Return, except the field derivation rule (relating to REDUCEDI) and the constant, default and null error steps.
Exchange Programmes (Instance.EXCHANGE)	Values are derived for this field as per the Student Return, except the field derivation rule (relating to REDUCEDI, COURSEAIM and Country) and without the constant, default and null error steps.
Qualification Awarded (QualificationsAwarded.QUAL)	Values are derived for this field as per the Student Return, except that this value is derived for all records.
Reason for Ending Instance (Instance.RSNEND)	Values are derived for this field as per the Student Return, except the Student Program record selected in Step 1 is where the Effective Date is on or before the reporting period end date and a value is derived irrespective of the REDUCEDI value.

Survey Creation

If all the selection criteria are met, then the process either creates a new survey record for the student or, if a record already exists, updates the record. The Survey Source is set to *I*. If the student has multiple career records then potentially the student may be picked up more than once by the selection logic for inclusion. In that case, the process creates multiple survey records for the distinct careers and logs a message. You must review the survey records and exclude any unwanted survey records by setting the survey status to *Duplicate*.

Importing the Target Population

Access the Import Survey Target Population page (Records and Enrollment >HESA Reporting >Destination of Leavers >Import Target Population).

Return Name Select a return.

Survey For DLHE, select the DLHE Survey translate values of April or January.

(Optional) For Graduate Outcomes, select any one of the following:

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- December Survey
- March Survey
- June Survey
- September Survey

XML Path/File Name Enter the file path and file name that you want the system to import.

Add Attachment Click to browse to the XML file that HESA provides, and click Upload. You can browse your local drive and select a file.

Note: The upload process creates a files subdirectory to store and process the XML file. This subdirectory is created in the server directory location that is specified in the PS_SERVDIR system parameter in the Application Server/Process Scheduler configuration file psappsrv.cfg/psprcs.cfg. Ensure that PS_SERVDIR is set up with an appropriate value in the configuration file and that users have the correct permission to access the files subdirectory.

Create New Surveys Select if you want the import process to create blank survey records for students in the population file who do not currently have a survey record.

For Graduate Outcomes return, this check box is selected by default.

Exclude Surveys Select if you want the process, at the end of processing the incoming population file, to set the Survey Status to *Excluded* for any existing survey records where the student is not included in the population.

For Graduate Outcomes return, this check box is selected by default.

Overwrite Values Select if you want the process to overwrite key values in the survey with the incoming values when the incoming student is matched to an existing survey record. These key values are HUSID, NUMHUS, COURSEID, MODE and TTCID.

For Graduate Outcomes return, this check box is selected by default.

Use the Student Override region to specify single or multiple students for whom the process imports the record and creates a survey.

Processing Steps

The import process creates or updates records for a single survey selected as a parameter. If the POPDLHE file provided by HESA contains records for multiple surveys (for example, APR and JAN), then the process should be run twice for the same XML. It should be run once for each survey.

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The process clears existing staging table records, opens the XML file and imports records into the staging table.

For DLHE survey, only records with the CENSUS value that matches the survey parameter value of APR or JAN are loaded.

If you provide the Student Override parameter value, then the process imports into the staging table only the records where the OWNSTU value matches one of the specified EMPLID (person ID) values.

For Graduate Outcomes, if the Survey field is blank, all the records in the XML file are imported to the staging record. Otherwise, records where the CENSUS value matches the Survey parameter are imported into the staging record.

For each staging record, the process matches to a single HESA Instance record based upon the following values:

- Academic Institution
- EMPLID: from OWNSTU in the target list record.
- Instance Identifier: from NUMHUS in the target list record.

If the process finds multiple HESA instance records, it selects the most recent effective dated record. For each HESA instance record, it selects the most recent effective dated record on or before the reporting period end date. If there is no existing survey for the combination of Institution, EMPLID, Academic Career, Student Career Number, Return Name and DLHE Survey, then the process creates a new record. The process then sets the Survey Source to *P*. If there is an existing survey, it updates the record. If any of the values for HUSID, NUMHUS, COURSEID, MODE and TTCID are different in the staging record from the existing survey record then if the Overwrite Values check box is selected, the process updates those values in the survey record.

Create New Surveys check box processing: If there is no existing survey for the combination of Institution, EMPLID, Academic Career, Student Career Number, Return Name and DLHE Survey, then the process creates a new survey record for the student using the values described in the following table:

Column Name	***Value***
INSTITUTION	Academic institution from the HESA instance record.
EMPLID	EMPLID from imported OWNSTU value.
ACAD_CAREER	Academic Career from the HESA Instance record.
STDNT_CAR_NBR	Student Career Number from the HESA Instance record.
SSR_HE_RET_NAME	HESA return name from the process parameter.

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Column Name	***Value***
SSR_HE_ APRJAN	For DLHE, Survey parameter (1 = APR or 2 = JAN). For GRADOUT, imported CENSUS values are converted to translate field value by matching the translate short name: • Dec = *A* • Mar = *B* • Jun = *C* • Sep = *D* If a translate does not match with a short translate value, the default value becomes X. If multiple translate values are set up with the same short translate value, one is randomly selected.
SSR_HE_SURV_STATUS	Set to *N* for new survey records.
SSR_HE_SOURCE	Set to *P* for Import Survey Target Population process.
SSR_HE_HUSID	HUSID value from the import file.
SSR_HE_NUMHUS	NUMHUS value from the import file.
SSR_HE_COURSEID	COURSEID value from the import file.
SSR_HE_MODE	MODE value from the import file.
SSR_HE_PT_FLAG	Blank **Note:** The mode values for DLHE are 1 or 2 to indicate full or part-time. For Graduate Outcomes, the actual MODE value is provided so the flag is left blank.
SSR_HE_TTCID	TTCID value from the import file.
SSR_HE_QTS_FLAG	If the imported TTCID = 1, 8, or G, then set to *Y*, else set to *N*.
SSR_HE_GRADSTATUS	For DLHE, blank. For GRADOUT, if Date of Death is populated for the EMPLID (PERSON.DT_OF_DEATH), the field is set to 01, else set to blank.
SSR_HE_FNAMES	FNAMES value from the import file.
SSR_HE_SURNAME	SURNAME value from the import file.
SSR_HE_METHOD	Set to blank.

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Column Name	*Value*
All other surveys fields	Set to blank or zero.

If the Create New Surveys check box is not selected, then the process does not create a new survey and logs a *survey not created* message.

Exclude Surveys check box processing: For each survey record for the Academic Institution, Return Name and Survey where Source (SSR_HE_SOURCE) is *I* or *M* (Identify DLHE Target Population or manually added) and Survey Status is not *E* or *D* (excluded or duplicate) and EMPLID does not appear in the staging records for the institution/survey, the process updates the Survey status to *E* (excluded) and logs an excluded survey message.

For Graduate Outcomes, because the Survey parameter can be blank and the staging table can include records for different surveys, the exclude processing is done for each distinct survey value that appears at least once in the staging record. For example, if the staging records contain just surveys for “Dec” and APRJAN = A, then only existing surveys for APRJAN = A that don’t also appear in the staging record with APRJAN = A are excluded. Processing is not done for existing survey records with any other APRJAN value. If the staging records contain surveys for “Mar” and “Jun,” then the exclude processing is done for existing survey records with APRJAN = B and C, but not for existing survey records for APRJAN = A or D and so on.

Note: The exclude survey processing ignores surveys that have already been created or updated by the Import Survey Target Population process where the source has been set to *P* and surveys that have been created by the Import Survey Data process where source has been set to *H*. The check on the EMPLID in the staging records is included to ensure surveys are not excluded where there is a pending staging record and the source has not yet been updated to *P* (for example, when the HESA Instance record is not found).

Importing DLHE Survey Data into the Staging Table

Access the Import Survey Data page (Records and Enrollment >HESA Reporting >Destination of Leavers >Import Survey Data).

The fields are similar to the existing Import Survey Target Population page. The XML Path/File Name field is optional and you can set it to blank to clear the existing imported staging records.

Note: Before running the Import Survey Data process, create blank survey records (that is, records with survey status = *New*) in Campus Solutions using either the Identify DLHE Target Population process or the Import HIN Target Population process. The Import Survey Data process matches the incoming survey data to the existing survey record and add the student’s responses. The Import Survey Data process then sets the survey record to *Submitted* or *Saved* depending on whether or not the incoming survey is complete. If there is no matching survey record, then the incoming survey will be saved as a pending staging record and you can use the staging page to add the required Student Program data to create a new survey record.

Processing steps

The process performs the following steps:

1. Deletes existing staging records

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The process deletes any existing staging records for the institution where import status is *I* (imported) or *O* (obsolete). Existing non-imported staging records can be updated to staging status = *O* (obsolete) through the DLHE staging data page.

2. Creates staging records

The process creates staging records based on the records in the XML or CSV file. The OWNSTU value is used as the EMPLID. If the OWNSTU element is not found, the record is not processed.

For each record found in the XML or CSV file, if the Survey parameter is *April,* the process checks for the APRJAN value. If the APRJAN value of the incoming record is *1*, the processing for the record is continued. Otherwise, the process skips the record and moves to the next record.

If the Survey parameter is *January* and if the APRJAN value of the incoming record is *2*, the processing for the record is continued. Otherwise, the process skips the record and moves to the next record.

If EMPLID values have been defined for the Student Override parameter, only records with a matching OWNSTU are imported.

If there is an existing staging record for the combination of EMPLID, Institution, Return Name and Survey (APRJAN), the process deletes the existing staging record and creates a new staging record. If staging record does not exist for the incoming record, the process creates a new staging record with import status = *N* (new).

If an XML element is not present in the XML file or there are blank fields in the CSV file, then the process sets the staging field to blank (character fields) or zero (number fields).

The SSR_HE_HUSID staging field defaults to the most recent effective dated HUSID external system ID for the EMPLID. The External System ID type for HUSID is defined for the institution in the HESA Configuration record. If no HUSID is found then the field is saved as blank and a value can be added via the staging data page once a HUSID external system ID has been added.

The process always sets the SSR_HE_METHOD to *04* (electronic reply) and SSR_HE_SOURCE to *H* (HESA survey).

Values of *X* or *x* are not imported for SSR_HE_MIMPACT.

SSR_HE_FOLLOWUP is set to *N* if the imported value is *1* and set to *Y* if the imported value is *0*.

3. Processes staging records

For each staging record:

The process matches to existing survey records in the database for the combination of Institution, EMPLID, Return Name and Survey (APRJAN) value. If there is a single existing student survey record with survey status (SSR_HE_SURV_STATUS) = *N* (new), it updates that survey record with the values from the staging record and sets staging status to *I* (imported).

If there are multiple existing survey records with survey status = *N* (i.e. new surveys for different Careers/Numbers), the process makes no update, more information is required to identify the correct survey to update for the ID. It sets the staging status to *P* (pending) for the records.

If there is one or more existing student survey records with survey status other than *N*, the process makes no update and sets the staging status to *P* (pending).

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If there is no existing survey record and if all the following required values are defined for the staging record, the process creates a new survey record with Survey Status of either *Submitted* or *Saved*:

- Institution (INSTITUTION)
- ID (EMPLID)
- Return Name (SSR_HE_RET_NAME)
- Survey (SSR_APR_JAN)
- Academic Career (ACAD_CAREER)
- Student Career Nbr (STDNT_CAR_NBR)
- HUSID (SSR_HE_HUSID)
- Instance Identifier (SSR_HE_NUMHUS)

After creation of a survey record, it sets the import status to *I* (imported).

If there are missing required values to create a new survey and if the existing import status is *N*, it sets the status to *P* (pending). If there are missing required values to create a new survey and the existing import status is not *N*, then the record is pending from a previous run.

The Survey Status is set to *Submitted* if the imported completion status is *04* (complete), otherwise the status is set to *Saved*.

The Part-Time flag is set based on any Mode Of Study value added for the staging record in the same way as for the Import HIN Target Population process.

The QTS flag is set if a Teacher Training Course (TTCID) value of *1* is added for the staging record or if any of the Section C teaching questions has a value.

The administrative coding fields are all set to blank as these values are not provided in the XML file.

Reviewing and Updating Imported Survey Data in Staging Table

Access the Survey Staging Data page (Records and Enrollment >HESA Reporting >Destination of Leavers >Survey Staging Data).

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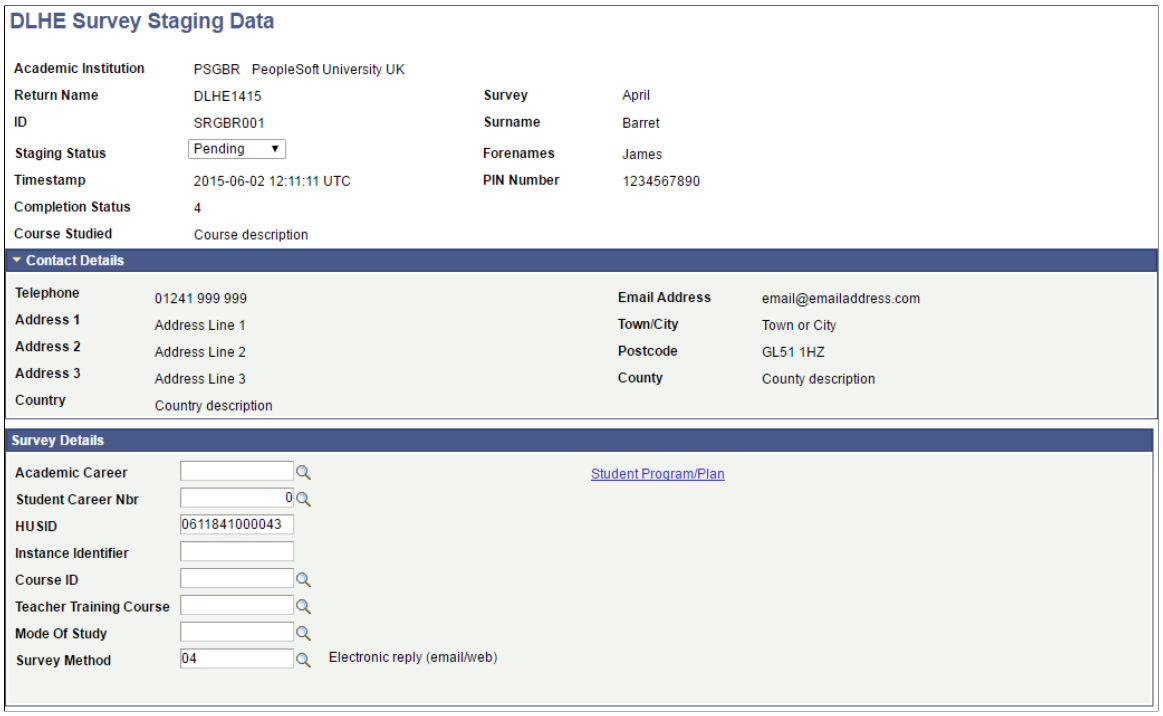
Image: Survey Staging Data page

This example illustrates the fields and controls on the Survey Staging Data page. You can find definitions for the fields and controls later on this page.



Staging Status

This field is available for edit if the status is not *Imported.*

The following statuses are available:

Pending: Record has not yet been added to the database. For pending records, you can add the required values to create a new survey record. Refer to the previous topic Importing DLHE Survey Data for the required values.

Imported: Record has been added to the database. All fields on the page are read-only if the staging status is *Imported*. These records will be deleted on the new run of the Import Survey Data process.

Obsolete: Record is not needed.

The Staging Status field can be set to *Obsolete* to allow the record to be deleted on the next run of the Import Survey Data process.

HUSID

The HUSID for the student is defaulted for new staging records so in most cases the value should already be populated in this field. If the HUSID has been added or changed after the staging record was created, the value can be added or changed here.

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	Refer to the previous topic “Importing DLHE Survey Data into Staging Table” for information on how the system adds the defaults value to this field.
Instance Identifier	The system populates the value by default from the HESA Instance record for the selected Career/Career Number. Change the value if the default does not exist.
Course ID	Optional to create a new survey record.
Teacher Training Course	Optional to create a new survey record. The system uses this value to set the QTS flag.
Mode Of Study	Optional to create a new survey record. The system uses this value to set the Part-Time flag.
Survey Method	The system enters the default value of *04* for new staging records. Update the value, if required.

Using the Survey Link Pagelet

The Enter DLHE Survey link for students to complete the survey appears in the Academics region of the Student Center. A DLHE Survey pagelet is available that academic institutions can deploy on a dashboard or portal as appropriate.

To add the pagelet to a dashboard, access the pagelet setup for the dashboard (PeopleTools >Portal >Dashboard >Manage Dashboard Pages >Pagelets). In the Campus Solutions region on the Content tab select the check box for Destination of Leavers Survey.

The Enter Survey link appears on this new pagelet only if the survey status is *New* or *Saved* (that is, the status is not *Submitted*, *Coded*, *Duplicate* or *Excluded*) and the current date falls within the survey start and end dates defined in HESA Returns setup.

If multiple open surveys are available, the system displays each survey record to allow selection of one survey.

The instruction text is displayed from the description of PeopleTools Message Catalog’s message number 476 from message set 14720 and can be updated if required.

When the student accesses the survey from the new pagelet and then selects the Cancel button, Save and Return button or Submit button on the survey pages, the system displays the pagelet rather than the Student Center.

Adding, Viewing, and Updating Surveys

Access the Survey Management page (Records and Enrollment > HESA Reporting > Destination of Leavers > Survey Management).

The Survey Management page enables users to retrieve existing survey records and either update the record on the page, navigate to a further detailed survey update page, navigate to the self-service DLHE Survey pages, or navigate to add a new survey. You can also use this page to view records created from the Graduate Outcomes population file as well as excluding records from the extract by setting the field Survey Status to *Excluded*.

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Survey Status	Select the current status value of the survey from the possible translate values defined as Coded, Duplicate, Excluded, New, Saved or Submitted.
Survey Method	(Optional) Select a survey method. This field does not appear for Graduate Outcomes return.
Graduate Status	(Optional) Select a status. This field does not appear for DLHE return.
Add Survey	Click to access the Add a Survey page where you can add a new survey record.
Details	Click to access the Survey Details page where you can review further details of the survey and add codes where required.
Enter Survey	Click to access the self-service Enter DLHE Survey page of the student where you can update the survey on behalf of the student. For Graduate Outcomes return, this button does not appear.

You can use the Survey Management page to edit the surveys created by the processes (Import Survey Target Population or Identify DLHE Target Population) or manually created.

Self-service Enter DLHE Survey page

Note that students can access this self-service page from the Student Center page. See "Entering and Submitting the DLHE Survey" (PeopleSoft Campus Solutions 9.2: Self Service).

When a student accesses this page from the Student Center page, the I do not wish to give this information check box is not available for salary information (Section B). However, when you as an administrative user access the page using the Enter Survey button, the same check box is available. Other differences are:

- Many of the radio button options (for example, the Question 1 options labelled as Most Important) and, in particular, the Question 17 check boxes are numbered for the administrative users. But for students, the numbers do not appear.
- The Clear buttons are available for only administrative users and not for students. This button is for only the radio button options, except for the radio button options in Section C. In Section C, if you clear the Newly Qualified Teacher Status check box, the system clears the values for all the radio button options in that section.
- The Occupational Classification field and the Post Doctoral Research Contract field for Question 4 and the JACS subject fields for Question 26 are available only for administrative users and not for students.
- The page displays telephone numbers and email addresses of the student to only administrative users and not to students.
- Notes region is available only for administrative users and not for students.

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- Allow incomplete submission and Require mandatory fields check boxes on the HESA Configuration page are applicable for only students. If an administrative user clicks Submit and if there are any questions in the Incomplete Questions list of Section F that are marked as required (*), then the page displays a warning message with the option of continuing to submit the survey or cancelling the submission with no update of survey status.

Adding a Survey

Access the Add a Survey page (Click the Add Survey button on the Survey Management page).

Survey

Select the survey translate value for Graduate Outcomes:

- December Survey
- March Survey
- June Survey
- September Survey

ID

Select person ID of the student for which the survey should be created.

Academic Career

Select the career for the selected person ID.

Mode of Study

Select an Instance.MODE code.

You can use this page to create a new survey rather than using the Import Survey Target Population or Identify DLHE Target Population processes. The student must have a HUSID external system ID before you can add a survey. A HUSID ID type must be entered in the External System field of the HESA Configuration page.

Viewing or Updating Survey Details

Access the Survey Details page (Click the Details button on the Survey Management page).

You can use the Survey Details page to view further details of a particular survey record and to add or update coded values required for the HESA extract of survey data.

Part-Time Study

Indicates whether the mode of study is full-time or part-time.

When a survey record is entered (by Import Survey Target Population or Identify DLHE Target Population processes or manually through the Add a Survey page), the system sets this field to *N* when the Mode of Study value entered is one of the full-time codes: 01, 02, 23, 24 or 25, otherwise the system sets the field to *Y* (including when the Mode of Study value is not entered).

This field does not appear for Graduate Outcomes return.

Survey Status

Select the current status value of the survey from the possible translate values defined as *Coded*, *Duplicate*, *Excluded*, *New*, *Saved* or *Submitted*.

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Survey Method

Select the method of data collection.

This field does not appear for Graduate Outcomes return.

Graduate Status

By default, this field is blank or set to *01*. You can add or update the value for the extract. If a graduate does not have any email or phone records in Contact details, you can set this field to *02*.

Newly Qualified Teacher Status

The system selects or clears this check box based on the derived or imported Course.TTCID value. If the Course.TTCID value is *1,* then the system automatically selects this check box.

If required, you can manually select or clear this check box.

This field does not appear for Graduate Outcomes return.

Delete

Click to delete the survey.

The system enables this button only if the Survey Status is *New*. If the status is not *New* and you want to delete a survey record: change the status to *New*, save the record, return to the Survey Management page, click the Details button to access the same record, and then click the Delete button.

When you delete a survey, the Survey Management page appears with the search results. The deleted survey will remain in these search results until you click the Search Surveys button again.

Supplied Fields

This region displays the imported values from the Graduate Outcomes survey record. You can edit this region to add missing values for survey records that are manually added.

Contact Details

This region displays email addresses, telephone, and address records from the Graduate Outcomes survey record. Use this region to review data that may be extracted. This view is not filtered so all current records for the graduate appear.

Employment Circumstances

The Employment Circumstances region displays the DLHE survey responses provided for key employment questions that are then used in coding of the survey prior to submission to HESA. The system enables this region if the student has selected either check box 1 (Working full-time) or check box 2 (Working part-time) under Activities for Q1 in the survey, that is SSR_HE_ALLACT1 = 1 or SSR_HE_ALLACT2 = 2. If neither check box is selected, then the system disables the Employment Circumstances region.

Q3 – Job Title

Displays the answer provided by the student to Question 3 (JOBTITLE) on the survey. If required, you can manually edit the value.

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Q4 – Job Duties	Displays the answer provided by the student to Question 4 (JOBDUTIES) on the survey. If required, you can manually edit the value.
Occupational Classification	Select the SOCDLHE coded value based upon the answers provided in Questions 3 and 4 on the survey.
Postdoctoral Research Contract	Select the POSTDOC coded value based upon the answers provided in Questions 3 and 4 on the survey.
Q9 – Organisation Name	Displays the answer provided by the student to Question 9 on the survey. If required, you can manually edit the value.
Q11 - Town/City/Area	Displays the answer provided by the student to Question 11 on the survey (LOCEMP_AREA) relating to the town/area/country of his or her employment. If required, you can manually edit the value.
Q11 - Postcode (UK Only)	Displays the answer provided by the student to Question 11 on the survey relating to the postcode of his or her UK employment. If required, you can manually edit the value.
Q11 - Country	Displays the answer provided by the student to Question 11 on the survey relating to the country code of his or her UK employment.
Employment Country	Select the coded country value if no UK postcode has been provided by the student in Question 11 on the survey.

Further Study

The Further Study region displays the DLHE survey responses provided for key further study questions that are used in the coding of the survey prior to submission to HESA. The system enables this region if the student has selected either check box 5 (Engaged in full-time further study…) or check box 6 (Engaged in part-time further study…) under Activities for Q1 in the survey, that is SSR_HE_ALLACT5 = 5 or SSR_HE_ALLACT6 = 6. If neither check box is selected, then the system disables the Further Study region.

Q27 - Course Name	Displays the answer provided by the student to Question 27 (CRSENAME) on the survey. If required, you can manually edit the value.
Q28 - Subject	Displays the answer provided by the student to Question 28 (CRSESBJ) on the survey. If required, you can manually edit the value.
JACS Subject	Select the JACS coded value based on the answers provided in Question 27 and 28 on the survey.
JACS Subject 2 and **JACS Subject 3**	The system enables these two fields only if you select a value for the JACS Subject field.
Q29 - Institution Name	Displays the answer provided by the student to Question 29 (UCNAME) on the survey.

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Institution Providing Study	Select the UCPROV coded value based on the answer provided in Question 29 on the survey.
Number of Courses	This field is relevant only for pre-2013/14 survey records.

Generating a HESA Return and Creating a Return File

Bundle 52.

For Data Futures return:

- Course Extract Data is updated to display the new DF entities and fields. Search results are updated to exclude any Course Extract records where there are no related Course Delivery extract records. The Entity Status search field is updated to filter Courses to only appear in the results if there is at least one related Course Delivery entity with the selected Entity Status. The Course Delivery tab is moved to the main tab.
- Module Extract Data is updated to display different regions for a Data Futures return. Entity Status is added as a new search field and also added to the Search Results. If a value is selected, search results are restricted to extract records with a matching Entity Status.
- A new component is added to the Extract Data menu to allow extract records for Qualification and related entities to be viewed.
- Student Extract Data is updated to display different regions for a Data Futures return. Entity Status is added as a new search field and also added to the Search Results. If a value is selected, search results are restricted to extract records with a matching Entity Status. Search only by the Entity Status of the parent Student entity is allowed. HUSID label is renamed to Student Identifier.

This section provides an overview of generating a HESA return and creating a return file and discusses how to:

- Import the HIN Target List.
- Generate a HESA extract.
- Review the extract data.
- Create a XML return file.
- Validate a XML return file.

Understanding Generating a HESA Return and Creating a Return File

After entering the data that you want to report to HESA at the various data capture levels, use the Create Extract process to generate the HESA return data. The return data is composed of extracts of various entities.

Before you generate the return data file, you can use the Extract Data pages to review and edit the HESA extracts that the Create Extract process generates.

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After reviewing the data for the Student, Offshore, ITT, Unistats/KIS, or DLHE return, use the Create XML Application Engine (SSR_HE_GXML) process to generate the XML file for the return. After the process generates the XML file, validate the file against the schema (not including the HESA business rules) using the Validate XML Application Engine (SSR_HE_VXML) process. You can review the errors reported by the Validate XML process, correct the errors, and rerun the extract process using the same or revised extract criteria.

You can validate the XML files both against the schema and the HESA business rules using the HESA Validation Kit. The HESA Validation Kit generates an error file that you can import into a Campus Solutions staging table. Once the records are imported, re-run the Create Extract process just for those records with validation errors. You can review these error records using the Extract Data pages, correct the errors, and rerun the extract process using the same or revised extract criteria.

When the full return passes the HESA validation, submit the XML file to HESA.

Note: You must run the Create HESA Instance process before running the Create Extract process.

After the academic institution has submitted the Student return, HESA provides a target list for the next reporting period. This target list includes all instances that are incomplete or not reported as dormant in the current reporting period. HESA requires that an Instance entity be reported for all these students in the next reporting period. Use the Import HIN Target List Application Engine (SSR_HE_IMPHI) process to import the target list and select the HESA Instance records that must be included in the next year's Student return.

Pages Used to Generate a HESA Return and Create a Return File

Page Name	*Definition Name*	*Navigation*	*Usage*
Import HIN Target List	SR_HE_HIN_RC	Records and Enrollment > HESA Reporting > Extract Processing > Import HIN Target List	Import the target list and select the HESA Instance records that the institution must include in the next year's Student return.
Create Extract Data	SSR_HE_EXT_PRC_RC	Records and Enrollment > HESA Reporting > Extract Processing > Create Extract	Generate return data. See Understanding HESA Derivation Steps
Institution Extract Data	SSR_HE_INSTITU_EXT	Records and Enrollment > HESA Reporting > Extract Data > Institution Extract Data	Review the Institution entity data that the Create Extract process generates. You can review the Institution entity data for Aggregate Offshore, Student, DLHE, Unistats/KIS and ITT returns.
DLHE Extract Data	SSR_HE_DLHE_EXT	Records and Enrollment > HESA Reporting > Extract Data > DLHE Survey Data	Review the Survey entity data that the Create Extract process generates.
Module Extract Data	SSR_HE_MOD_EXT	Records and Enrollment > HESA Reporting > Extract Data > Module Extract Data	Review the Module and Module Subject entity data that the Create Extract process generates.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Course Extract Data	SSR_HE_CRS_EXT	Records and Enrollment > HESA Reporting > Extract Data > Course Extract Data	Review the Course and Course Subject entity data and the KISCourse entity data that the Create Extract process generates.
Student Extract Data	SSR_HE_STUD_EXT	Records and Enrollment > HESA Reporting > Extract Data > Student Extract Data	Review the data that the Create Extract process generates for a student.
Instance Extract Data	SSR_HE_INST_EXT	Records and Enrollment > HESA Reporting > Extract Data > Student Extract Data > Instance Extract Data	Review the Instance, Student On Module, Entry Profile, Qualifications On Entry, Qualifications Awarded, and RAE entity data that the Create Extract process generates for a student.
Provision Extract Data	SSR_HE_PROV_EXT	Records and Enrollment > HESA Reporting > Extract Data > Provision Extract Data	Review the Provision entity data that the Create Extract process generates for a student's Aggregate Offshore return.
ITT Extract Data	SR_HE_ISTUD_EX	Records and Enrollment > HESA Reporting > Extract Data > ITT Extract Data	Review the Student and Course Subject entity data that the Create Extract process generates for a student's ITT return.
Create XML	SSR_HE_GXML_RC	Records and Enrollment > HESA Reporting > Extract Processing > Create XML	Create the XML file for HESA submission.
HESA Validate XML	SSR_HE_VXML_RC	Records and Enrollment > HESA Reporting > Extract Processing > Validate XML	Validate the XML file generated by the Create XML process.

Importing the HIN Target List

Access the Import HIN Target List page (Records and Enrollment > HESA Reporting > Extract Processing > Import HIN Target List).

Before you run the process, ensure the following exist:

- HESA Instance records. These record contain the HIN Population Year field to store the reporting year value.
- Instance Identifier values in the HESA Instance records must match the NUMHUS values in the target list file.
- EMPLID values must match the OWNSTU values in the target list.

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Increment Year of Program Select to increment the Year of Program value by one when the Import HIN Target List process creates a new effective dated HESA Instance record for the reporting period.

The Add Attachment button and XML Path/File Name field are similar to the same button and field on the Import Survey Target Population page.

See “Importing POPDLHE Survey Target List” subsection in the Understanding Preparing for Generating DLHE Return section.

The four check boxes (other than the Increment Year of Program check box) are similar to the check boxes on the Calculate Year of Student page.

See “Calculating Year of Student Values for Students” subsection of the Setting Up and Entering Data for HESA Reporting section.

The Import HIN Target List process sets the HIN Population Year of the instance records to the reporting year value of the reporting period parameter. This enables the Create Extract process to identify the instance records for the next reporting year. For example, when you run the Import HIN Target List process with a reporting period parameter set to *2009/10,* the process sets a student's HIN Population Year to *2009.* Subsequently, when you run the Create Extract process for the reporting period *2009/10,* the HIN Population Year of the student matches the reporting year of the reporting period, and therefore the Create Extract process automatically includes the Instance entity of the student regardless of other criteria.

The following steps describe the Import HIN Target List process:

1. The Import HIN Target List process imports the target list into the staging tables.

2. For each staging record, the process finds HESA Instance records in Campus Solutions database by matching the academic institution (provided as the run parameter), EMPLID (provided as OWNSTU in the target list record), and Instance Identifier (provided as NUMHUS in the target list record). This may mean multiple records are picked up for the same Instance Identifier.

3. The process logs messages for those records that do not have a matching HESA Instance record. The process retains the unmatched record in the staging table.

4. If the most recent effective dated HESA Instance record has an effective date before the reporting period start date:

   a. The Import HIN Target List process creates a new effective dated record using the reporting period start date. It copies all the data from the following records to the new effective dated record: Header record (SSR_HE_INSTANCE), Entry Profile fields (SSR_HE_INST_FLD where SSR_HE_ENTR_FLAG = Y), Entry Qualifications (SSR_HE_QUAL_ENT), Employment Status (SSR_HE_INST_EST), Employment Monitoring (SSR_HE_INST_MON), Learner (SSR_HE_INST_LRN), and Learning Delivery (SSR_HE_INST_LDL).

      The Instance Details fields (SSR_HE_INST_FLD where SSR_HE_ENTR_FLAG = N), including the Further Education Instance fields, are copied only if you have selected the Copy Instance Details check box.

      The Qualifications Awarded (SSR_HE_QUAL_AWD) records are copied only if you have selected the Copy Qualifications Awarded check box.

      The Research Data (SSR_HE_INST_RES) records are copied only if you have selected the Copy Research Data check box.

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The FTE Details (SSR_HE_INST_FTE) records are copied only if you have selected the Copy FTE Details check box.

b. The process sets the HIN Population Year to the reporting year value of the reporting period parameter.

c. If the Increment Year of Program run parameter is selected and the existing record has a Year of Program value greater than zero, then the process increments the year of program by one in the new record.

5. If a HESA Instance record starts within the reporting period, the process sets the HIN Population Year of the existing record to the reporting year value of the reporting period parameter.

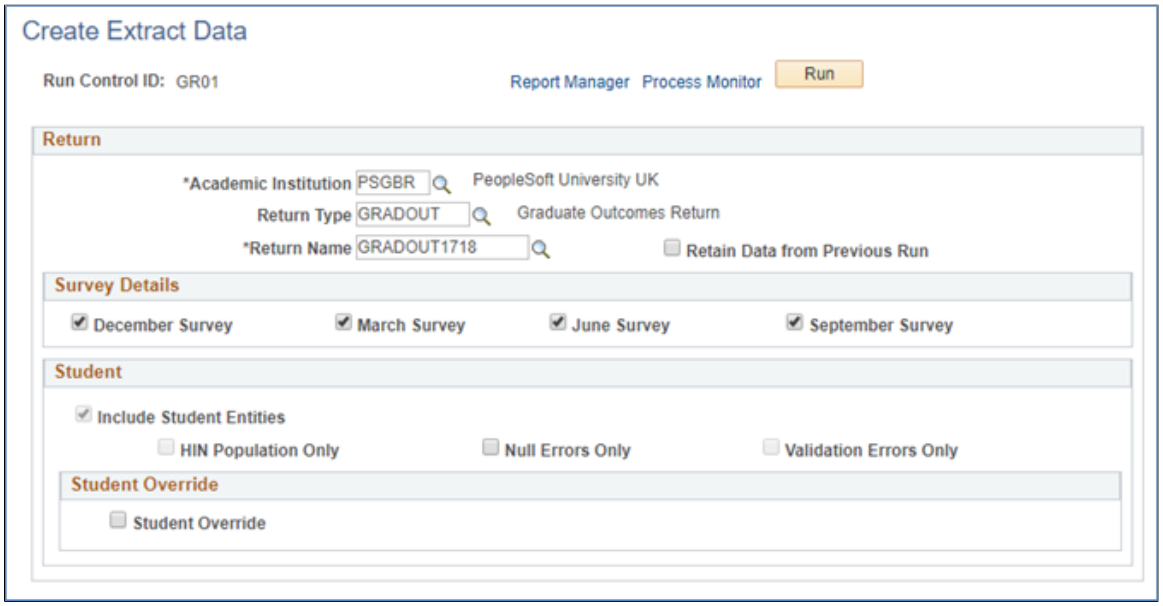
Generating a HESA Extract

Bundle 52. For the Student and ITT returns, the steps to derive values from Plan and Sub-Plan Offering and Year records are updated to only consider records where the new key fields added for DF are all blank. This ensures only one record is selected.

Access the Create Extract Data page (Records and Enrollment > HESA Reporting > Extract Processing > Create Extract).

Image: Create Extract Data page

This example illustrates the fields and controls on the Create Extract Data page. You can find definitions for the fields and controls later on this page.



Return Type Enter a return type to filter the list of available returns in the Return Name field.

Return Name Enter the return for which the process should generate the reporting data.

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You set up a return using the Returns Setup component.

Retain Data from Previous Run Select to have the Create Extract process delete the existing inactive data, update the existing active data to inactive, and to extract new data. If the check box is deselected, then the process deletes all the existing data (both active and inactive) records and extracts the new data.

The fields on this page are available for entry depending on the return you select. For example, the system disables the Course/Module, Student, and Student Override regions for an Aggregate Offshore return. If the return is DLHE, only the Null Errors Only and Validation Errors Only check boxes in the Student region and the Student Override region are available.

Survey Details

Use this region to select which survey records are included in the extract. Each check box is enabled only if the corresponding Survey value is defined for the return. You can run the extract process for only one Graduate Outcomes survey at a time.

If only one survey is defined for the return, that survey check box is selected by default and the other check boxes are disabled. If more than one survey is defined, then all the check boxes are enabled and default to the deselected state. You must select at least one check box to run the process. When you select a check box, other check boxes that are currently selected are automatically deselected.

Course/Module

Use this region to include or exclude the Course and Module entity data in the Student return. Also, you can use the region to restrict the Course and Module entity data in the Student return. For example, you can specify that the process should create Course data for all the courses in the undergraduate career and Module data for a Biochemistry course offering in the undergraduate career.

Also, use this region to include or exclude the KISCourse entity data in the Unistats/KIS return.

You can use this region only for Student and Unistats/KIS returns. This region is not applicable for ITT, Offshore, DLHE, and Graduate Outcomes returns.

Academic Career Select to restrict the Course and Module extracts of the Student return to a particular career.

This check box is not applicable for Unistats/KIS return.

Note: If you select an academic career, the process will restrict the Instance extract in the Student return based on the selected career because the process creates Instance records only if the plan or subplan is already included in the Course extract.

The system enables the Academic Career field only if you select either the Include Course Entities check box or the Include Module Entities check box. However, if you select either the Null Errors Only check box or the Validation Errors Only check box, the system disables this field.

Include Course Entities Select to include the Course and Course Subject extracts in the Student return.

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Select to include KISCourse extract in the Unistats/KIS return.

Null Errors Only

Select to restrict the Course or KISCourse extract to those records where a *NULL ERROR* value has been derived in the previous run of the process.

You cannot select both the Null Errors Only and Validation Errors Only check boxes for the Course entity.

Validation Errors Only

Select to restrict the Course or KISCourse extract to those records where the HESA Validation Kit has identified a validation error and the error details have been imported to the validation staging table.

Academic Plan

Select to restrict Course or KISCourse extract to a particular plan.

The system enables this field only if the Include Course Entities check box is selected and both the Null Errors Only and Validation Errors Only check boxes are cleared.

All active academic plans are available for selection. Ensure that the Report to HESA check box is selected on the Plan HESA Data page for the plan you have selected.

Academic Sub-Plan

Select to restrict Course or KISCourse extract to a particular subplan.

The system enables this field only if the Include Course Entities check box is selected and both the Null Errors Only and Validation Errors Only check boxes are cleared.

All active academic subplans are available for selection. Ensure that the Report to HESA check box is selected on the Sub-Plan HESA Data page for the subplan you have selected. Also, select the Enable Sub-Plan Reporting check box on the HESA Returns page if you want to report subplan data.

Include Module Entities

Select to include the Module and Module Subject extracts.

This check box is not applicable for Unistats/KIS return.

Null Errors Only

Select to restrict the Module extract to those records where a *NULL ERROR* value has been derived in the previous run of the process.

You cannot select both the Null Errors Only and Validation Errors Only check boxes for the Module entity.

Validation Errors Only

Select to restrict the Module extract to those records where the HESA Validation Kit has identified a validation error and the error details have been imported to the validation staging table.

Course ID and Course Offering Nbr

Select to restrict the Course entity data to a particular course.

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If you select a Course ID or Course Offering Number, the process creates Module and StudentOnModule data for only the selected values.

All active courses are available for selection. Ensure that the Report to HESA check box is selected on the HESA Module Data page for the course ID and course offering number you have selected.

The system enables this field only if the Include Module Entities check box is selected and both the Null Errors Only and Validation Errors Only check boxes are cleared.

Student

Use this region to include or exclude the student-related entity data in the return. Also, you can use the region to restrict the student-related entity data. Examples of student-related entities include Instance, Student, and Entry Profile entities.

This region is not applicable for Unistats/KIS return.

Include Student Entities

Select to include the student-related extracts.

The system enables this check box for only Student returns. For DLHE and ITT, the Create Extract process automatically includes the student-related entity data.

HIN Population Only

Select to restrict the Instance extract to only those continuing students whose HIN Population Year value in the HESA Instance record matches the Reporting Period Year.

The system enables this check box for only Student returns.

Note that this check box affects only continuing students and does not affect new students.

Null Errors Only

Select to restrict returns to those students where a *NULL ERROR* value has been derived in one of the student-related entities during a previous run of the process.

You cannot select all three check boxes — Null Errors Only, Validation Errors Only, and Student Overrides — for the student-related entities. Only one check box can be selected.

The system enables this check box for only Student, ITT, and DLHE returns.

Validation Errors Only

Select to restrict the student-related entities in the extract to those records where the HESA Validation Kit has identified a validation error and the error details have been imported to the validation staging table.

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You cannot select all three check boxes — Null Errors Only, Validation Errors Only, and Student Overrides — for the student-related entities. Only one check box can be selected.

The system enables this check box for only Student and ITT returns.

Student Override

Use this region to specify a single or multiple students for whom the process should generate the return data.

The system enables the Student Override check box for only Student, ITT, and DLHE returns.

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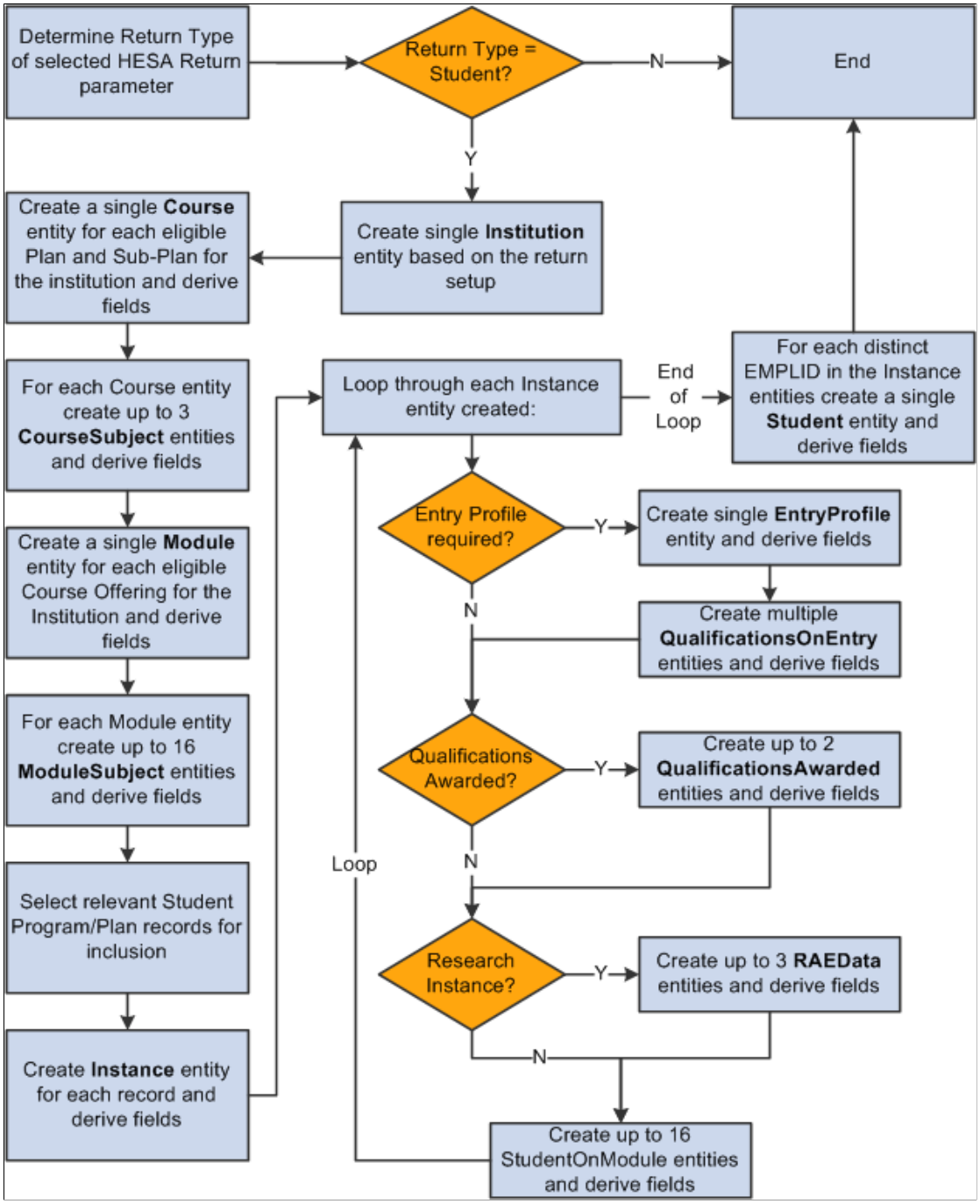
Processing Diagram

Image: Process for Creating Student Return Entities

The following diagram describes how the Create Extract process creates the entities for a student return:



When the process creates an entity record, it sets the record to *active.* The records it created previously are set to *inactive* or deleted depending on whether or not the Retain Data from Previous Run check box is selected. The process deletes the records it created before the previous run.

Refer to the documentation sections of each entity (for example, the “Student Record Return: Course Entity” section), for information about how the system includes records for each entity.

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Also, specifically, refer to the following documentation sections for information about how the entities are processed when you select the validation only and null only check boxes:

- Student Record Return: Course Entity
- Student Record Return: Module Entity
- Student Record Return: Instance Entity
- ITT Return: Student Entity
- DLHE Return: Study Entity

HESA Validation Errors

To run the Create Extract process for records with validation errors:

1. Use the File Parser utility to import the errors, reported by the HESA Validation Kit, into a staging table (PS_SSR_HE_VAL_STG)
2. Run the Create Extract process just for those records with validation errors. You must select at least one of the Validation Errors Only check boxes for the process to select error records from the PS_SSR_HE_VAL_STG table.
3. Use the Extract Data page to review the extract records with errors.

Note: You should ensure that all previous validation error records, including the header record, have been processed and deleted from the validation staging table before importing a new validation errors file to the staging table using the File Parser process.

Using File Parser to import HESA Validation Kit errors

When you use the HESA Validation Kit to process an XML file, the kit reports errors with an option to save the error details as a text (.txt) file. To import the records from the text file into the PS_SSR_HE_VAL_STG staging table, you can use File Parser process. For more information about setting up and running the File Parser process, refer to the File Parser documentation:

See "Understanding the File Parser Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

See"Running the File Parser Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

Note that the Field Conversion Definition setup is required only if the file data needs to be converted before inserting into the staging table. Therefore, this setup is not required for HESA validation error processing.

The following is an example of the context definition setup for HESA Validation error processing:

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Image: Context Definition setup for HESA error processing (1 of 2)

This example illustrates Context Definition setup for HESA error processing (1 of 2). You can find definitions for the fields and controls later on this page.

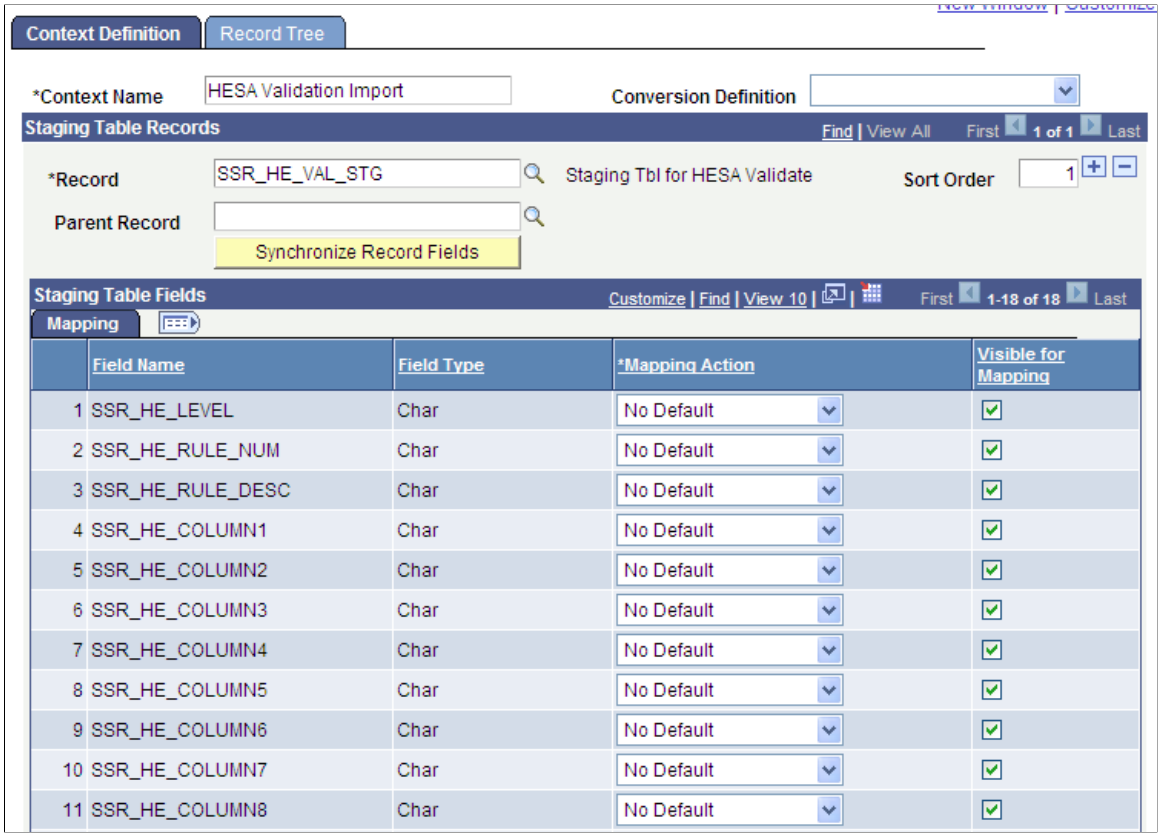
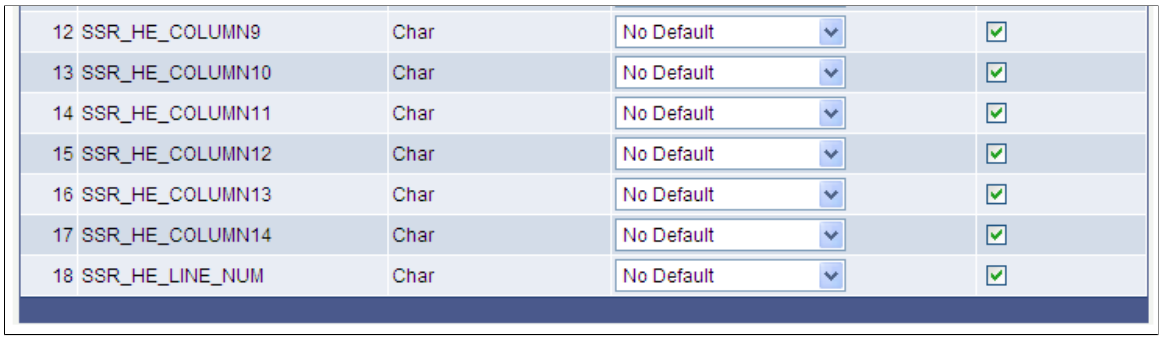


Image: Context Definition setup for HESA error processing (2 of 2)

This example illustrates Context Definition setup for HESA error processing (2 of 2). You can find definitions for the fields and controls later on this page.



Click the Refresh Layout Tree link on the Record Tree page to view the staging table (SSR_HE_VAL_STG) that holds the imported validation errors.

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Image: Record Tree page for SSR_HE_VAL_STG

The following is an example of the Record Tree page for SSR_HE_VAL_STG:

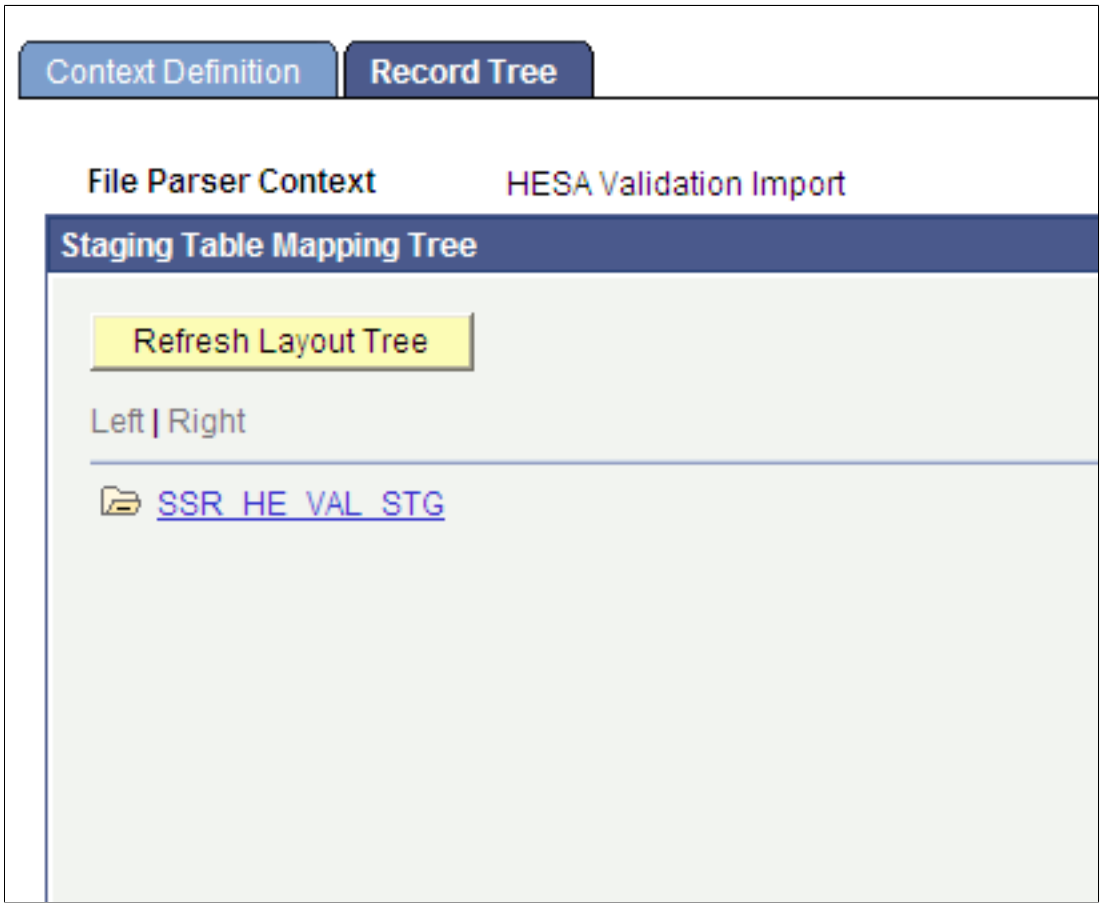

Image: Example of a File Definition page

Campus Solutions delivers an example definition that includes the possible validation error values that you can import:

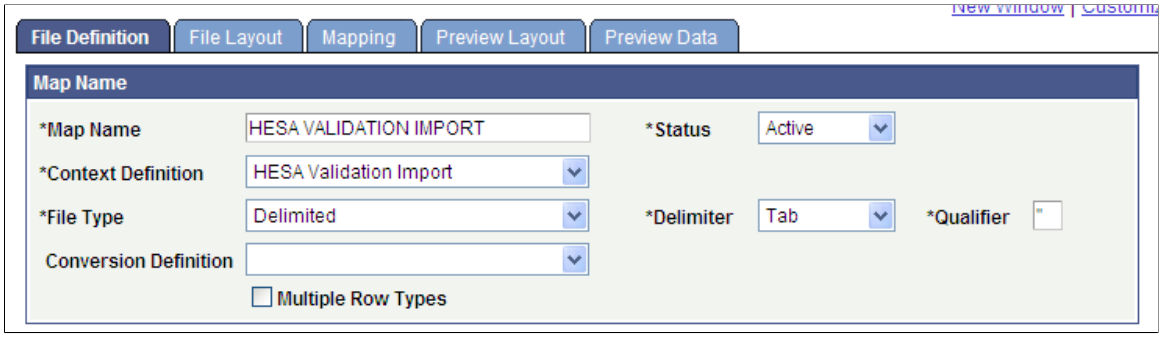

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Image: An example of the error file structure set up on the File Layout page

The delivered definition is based on an assumed error file structure:

	*Sort Order	*File Field Name	Field Number	Field Type
1	10	Level	1	Character
2	20	Rule number	2	Character
3	30	Rule description	3	Character
4	40	COURSEID	4	Character
5	50	SBJCA	5	Character
6	60	MODID	6	Character
7	70	MODSBJ	7	Character
8	80	COSTCN	8	Character
9	90	OWNSTU	9	Character
10	100	HUSID	10	Character
11	110	OWNINST	11	Character
12	120	NUMHUS	12	Character
13	130	QUALSBJ	13	Character
14	140	QUALTYPE	14	Character
15	150	QUAL	15	Character
16	160	UOA2008	16	Character
17	170	Line Number	17	Character

The header row for the file would contain the field names, indicated in the preceding example, without the Line Number.

You can copy an existing File Mapping Definition (Set Up SACR, System Administration, Utilities, File Parser, Copy File Map Definition) and then edit the copied version to create different mappings that match the fields in the error file.

Map the key fields of COURSEID, MODID, and OWNSTU to a staging table column if the values for the fields are provided in the errors file. Also, map the Level, Rule Number, and Rule Description values.

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Image: Mapping for the minimum fields (1 of 2)

The following is an example of the Mapping page with the mappings for these fields:

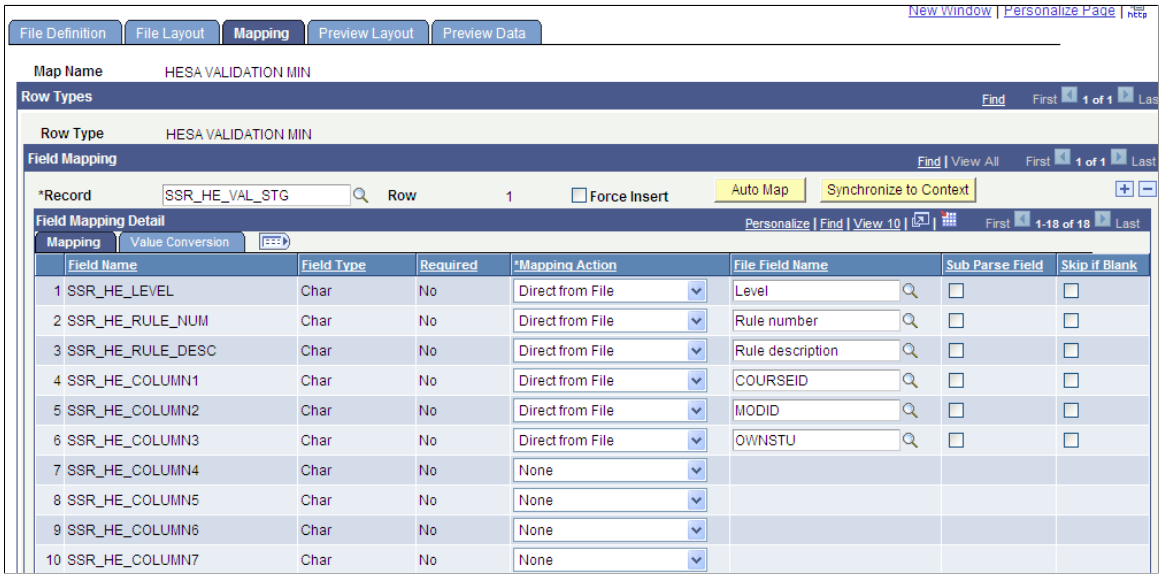
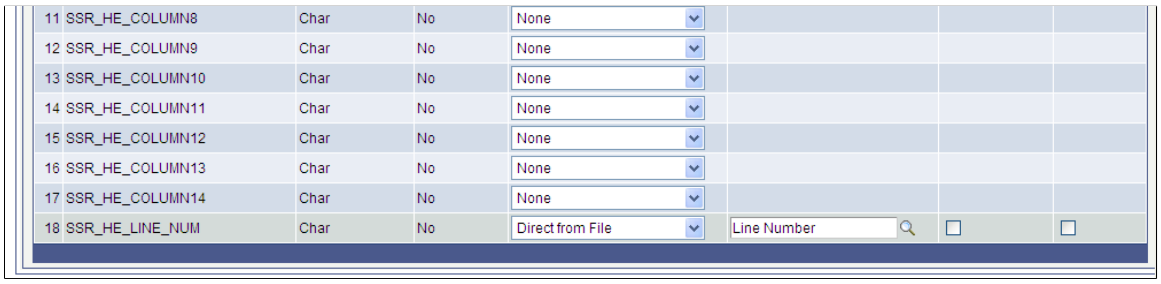


Image: Mapping for the minimum fields (2 of 2)

Example of mapping for the minimum fields (continued):



To process the staging table records, the Create Extract process does not rely on values existing in a particular column but the process will select the key COURSEID, MODID and OWNSTU values based on the header row value for the column in the error file. Therefore, you must include the header row in the error file being imported.

Other than the key and Level, Rule Number and Rule Description values, you can map the remaining fields to import the full details of the errors into the staging table record. This step is optional because the non-key values are not required for the subsequent processing of the staging table records by the Create Extract process.

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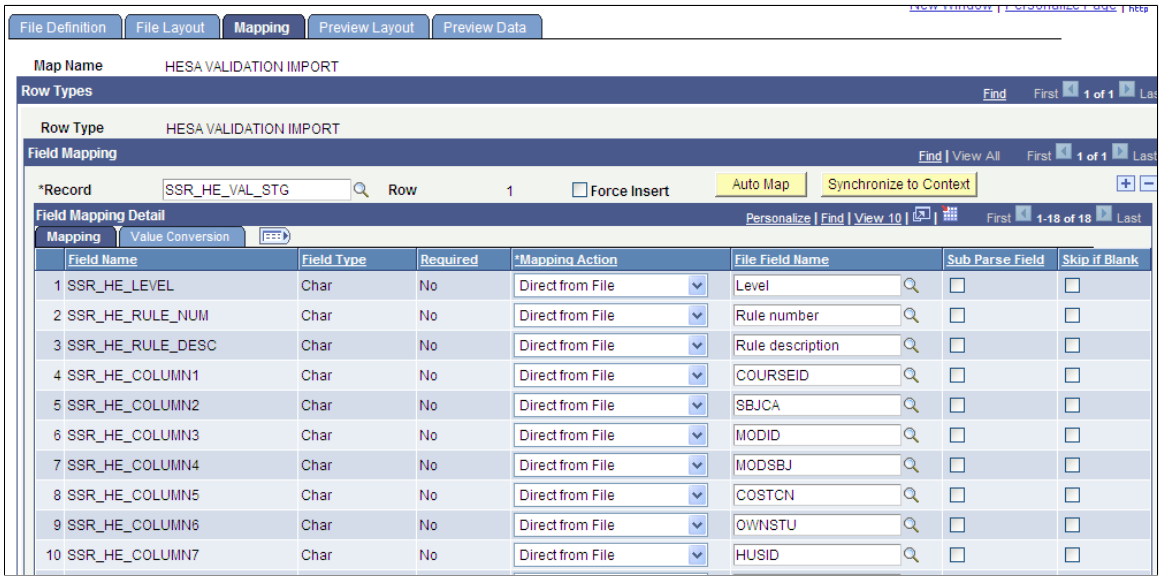
Image: Mapping for the full error file (1 of 2)

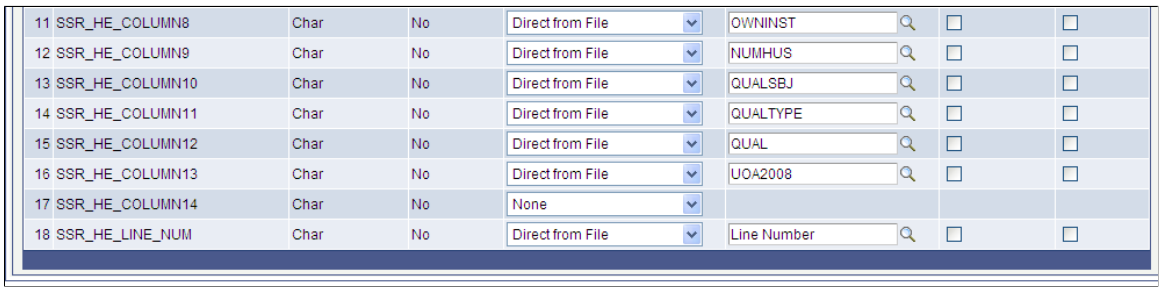
This is the mapping for the full Student return error file:



	Field Name	Field Type	Required	*Mapping Action	File Field Name	Sub Parse Field	Skip if Blank
1	SSR_HE_LEVEL	Char	No	Direct from File	Level		
2	SSR_HE_RULE_NUM	Char	No	Direct from File	Rule number		
3	SSR_HE_RULE_DESC	Char	No	Direct from File	Rule description		
4	SSR_HE_COLUMN1	Char	No	Direct from File	COURSEID		
5	SSR_HE_COLUMN2	Char	No	Direct from File	SBJCA		
6	SSR_HE_COLUMN3	Char	No	Direct from File	MODID		
7	SSR_HE_COLUMN4	Char	No	Direct from File	MODSBJ		
8	SSR_HE_COLUMN5	Char	No	Direct from File	COSTCN		
9	SSR_HE_COLUMN6	Char	No	Direct from File	OWNSTU		
10	SSR_HE_COLUMN7	Char	No	Direct from File	HUSID		

Image: Mapping for the full error file (2 of 2)

Mapping for the full Student return error file (continued):



11	SSR_HE_COLUMN8	Char	No	Direct from File	OWNINST		
12	SSR_HE_COLUMN9	Char	No	Direct from File	NUMHUS		
13	SSR_HE_COLUMN10	Char	No	Direct from File	QUALSBJ		
14	SSR_HE_COLUMN11	Char	No	Direct from File	QUALTYPE		
15	SSR_HE_COLUMN12	Char	No	Direct from File	QUAL		
16	SSR_HE_COLUMN13	Char	No	Direct from File	UOA2008		
17	SSR_HE_COLUMN14	Char	No	None			
18	SSR_HE_LINE_NUM	Char	No	Direct from File	Line Number		

As with the Student return, for the ITT return, you must map the Level, Rule Number and Rule Description values along with the key OWNSTU value. The File Parser process uses these mappings to identify the extract records that are to be re-processed by the Create Extract process.

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Image: Mapping for the minimum fields — ITT (1 of 2)

This example illustrates the mapping for the minimum fields — ITT.

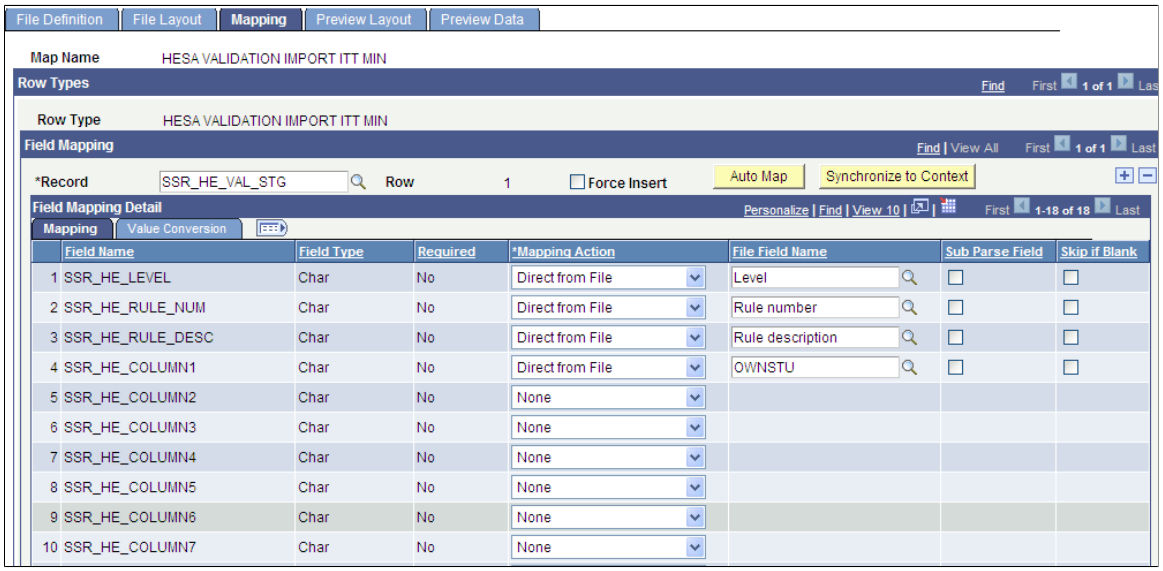
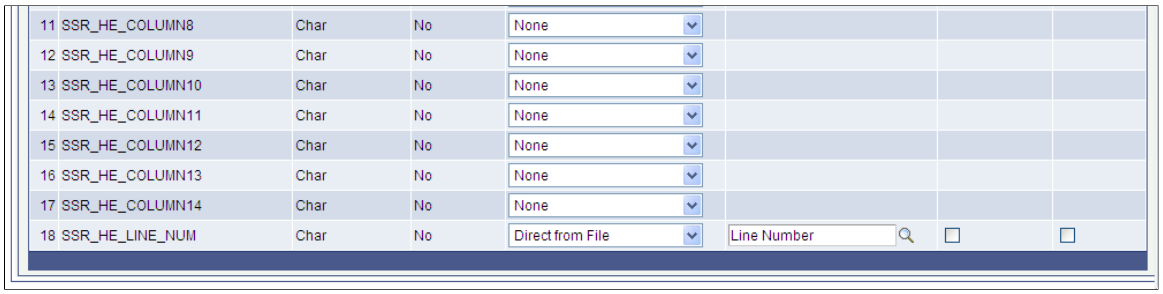


Image: Mapping for the minimum fields — ITT (2 of 2)

Mapping for the minimum fields — ITT (continued).



This is the mapping for the full ITT error file:

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Image: Mapping for the full error file — ITT (1 of 2)

This example illustrates the mapping for the full error file — ITT.

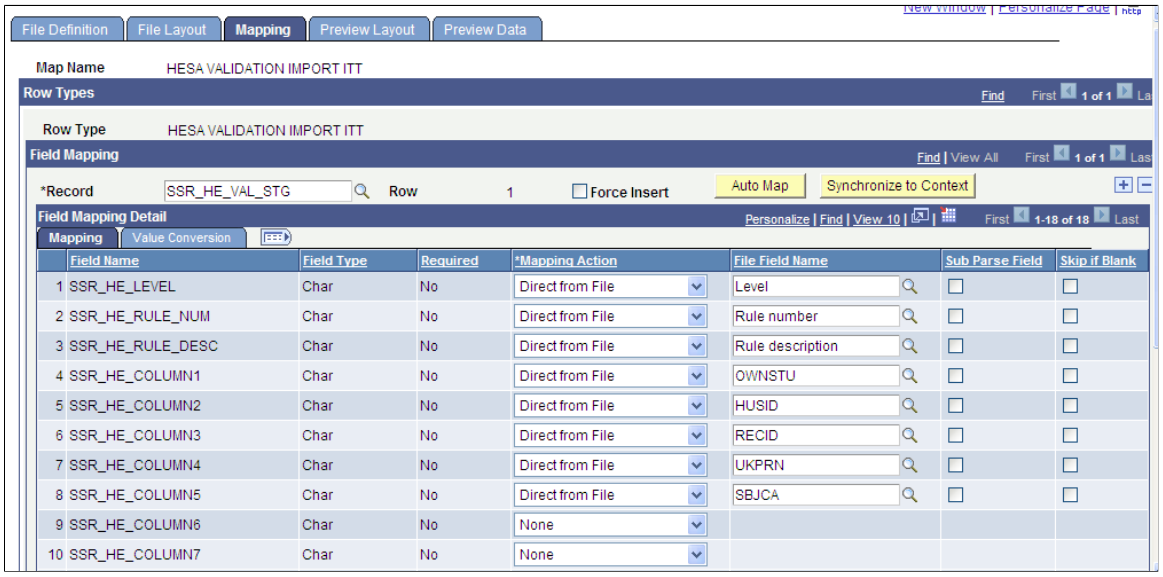
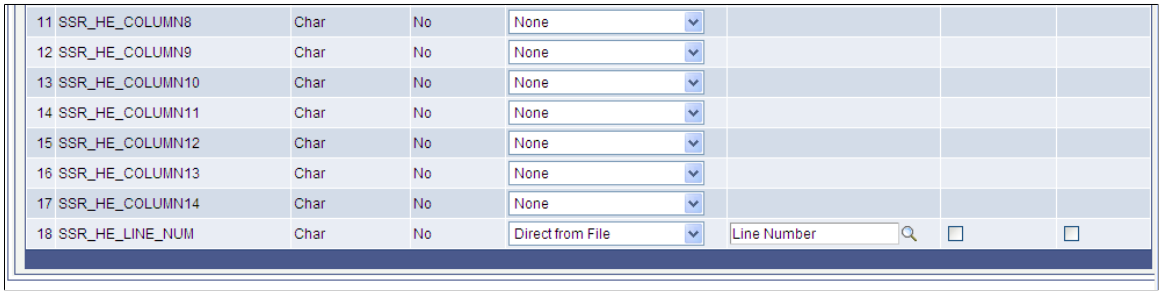


Image: Mapping for the full error file — ITT (2 of 2)

Mapping for the full error file — ITT (continued).



On the Preview Data page, you can attach an error file and generate a preview based on the first row in the error file. This lets you check whether the values will populate the correct columns in the staging table.

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Image: Example of the Preview Data page

The following is an example of the Preview Data page:

In the preceding example, note that because the header row does not included a label for Line Number that value is blank in the preview.

Reviewing the Extract Data

Access the extract data pages (Records and Enrollment >HESA Reporting >Extract Data).

Use the Institution Extract, Module Extract Data, Course Extract Data, Student Extract Data, and Instance Extract Data pages to review the Student return extract data.

Use the Institution Extract and Provision Extract Data pages to review the Aggregate Offshore return data.

Use the Institution Extract and ITT Extract Data pages to review the ITT return data.

Use the Graduate Outcomes Extract Data page to review the Graduate Outcomes return data.

For the Unistats/KIS return, use the Institution Extract page to review institution level fields and fields of Location entities. Use the Course Extract Data page to review the KIS Course records.

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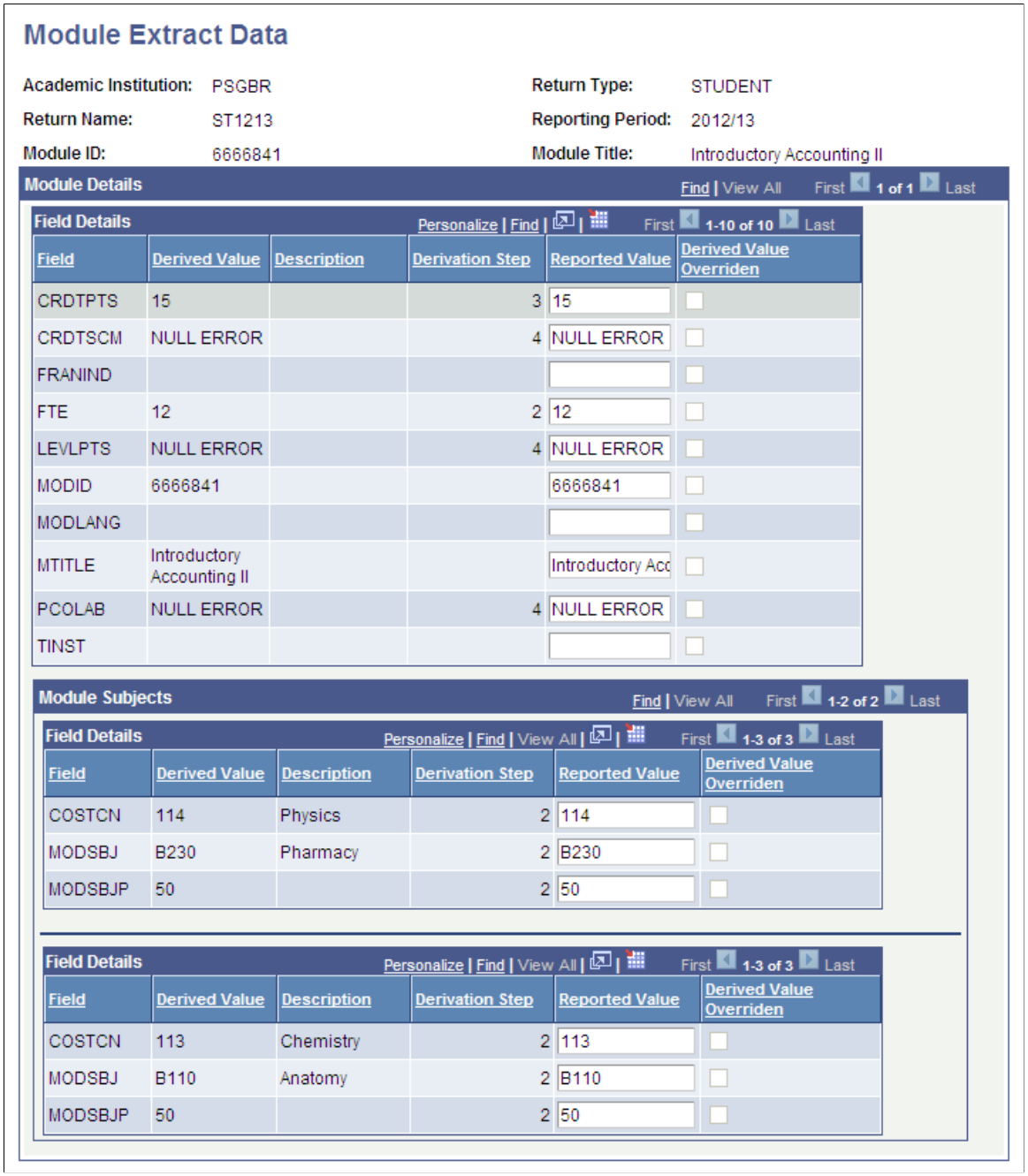
Image: Example of an extract data page

The following example shows an extract data page:



Module Extract Data

Academic Institution: PSGBR
Return Type: STUDENT
Return Name: ST1213
Reporting Period: 2012/13
Module ID: 6666841
Module Title: Introductory Accounting II

Module Details — Find | View All — First 1 of 1 Last

Field Details — Personalize | Find | First 1-10 of 10 Last

Field	Derived Value	Description	Derivation Step	Reported Value	Derived Value Overriden
CRDTPTS	15		3	15	
CRDTSCM	NULL ERROR		4	NULL ERROR	
FRANIND					
FTE	12		2	12	
LEVLPTS	NULL ERROR		4	NULL ERROR	
MODID	6666841			6666841	
MODLANG					
MTITLE	Introductory Accounting II			Introductory Acc	
PCOLAB	NULL ERROR		4	NULL ERROR	
TINST					

Module Subjects — Find | View All — First 1-2 of 2 Last

Field Details — Personalize | Find | View All | First 1-3 of 3 Last

Field	Derived Value	Description	Derivation Step	Reported Value	Derived Value Overriden
COSTCN	114	Physics	2	114	
MODSBJ	B230	Pharmacy	2	B230	
MODSBJP	50		2	50	

Field Details — Personalize | Find | View All | First 1-3 of 3 Last

Field	Derived Value	Description	Derivation Step	Reported Value	Derived Value Overriden
COSTCN	113	Chemistry	2	113	
MODSBJ	B110	Anatomy	2	B110	
MODSBJP	50		2	50	

You can use the Extract Data pages to override the derived field value. For example, you can enter a different value for ModuleSubject.COSTCN in the Reported Value field and click the Save button. When you click the Save button, the Derived Value Overridden check box appears as selected for ModuleSubject.COSTCN. The Extract Data pages also display the sequence number of the step that derives the field value.

The documentation sections for entities list the derivation steps for each field. For an example of such a section, see Student Record Return: Course Entity.

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You can review only the most recent data for a particular return. When you run the Create Extract process, the system automatically deletes any data previously generated for a return.

Null Error check box on the Instance Extract Data page

The Create Extract process selects this check box if any field in the student's extract data has a *NULL ERROR* value. The Null Error check box is applicable for only Student return.

Creating an XML Return File

Bundle 52.

The existing process is updated to create the XML file for a student return as per the revised schema.

Access the Create XML page (Records and Enrollment > HESA Reporting > Extract Processing > Create XML).

After you review the return data using the Extract Data pages, use the Create XML page to run the Create XML File process.

Return Name	Enter the return that you want to process.
XML Path/File Name	Enter the file path and file name that you want the system to use to save the XML file. You must enter a valid directory path that maps to a folder with appropriate Read/Write permission. If you cannot locate such a folder, consult your system administrator.
Exclude Null Error tags	Select this check box if you want the process to exclude fields with a Reported Value of *NULL ERROR* from the XML file. If you do not select this check box, then the process includes the fields with Reported Value of *NULL ERROR*.

The Create XML process automatically excludes from the XML file:

- A field that does not have a value (null).
- An entity in which all fields have no values.

After running the process, you can use the View Log/Trace page to download the generated XML file to your local machine.

Note for Student return

The Create XML File process includes the RAEData element as <REFData> in the XML file. The MOBTYPE2 and MOBTYPE3 fields are included in the XML as <MOBTYPE>. NATIOND2 is included as <NATIOND>, REGBODY2 as <REGBODY>, and TQGSUB2 and TQGSUB3 as <TQGSUB>.

Note for ITT return

- Blank NQTEMAIL values are included as empty tags, that is, <NQTEMAIL/>
- PGCECLSS – included in the XML as <DEGCLSS>
- PGCESBJ – included in the XML as <DEGSBJ>

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- PGCESBJ2 – included in the XML as <DEGSBJ>
- PGCESBJ3 – included in the XML as <DEGSBJ>

Note for Unistats/KIS return

The Create XML File process converts the tags for the following field names:

- OTHERINST2 to OTHERINST9 converted to <OTHERINST>
- SSR_HE_COURSEID converted to <KISCOURSEID>
- SSR_HE_CTITLE is converted to <TITLE>
- JACSA, JACSB and JACSC converted to <JACS>
- TEACHUKPRN2 and TEACHUKPRN3 converted to <TEACHUKPRN>

Note for DLHE return

The Create XML File process includes the PREVEMP field as <PREVEM> in the XML file.

Validating an XML Return File

Access the HESA Validate XML page (Records and Enrollment > HESA Reporting > Extract Processing > Validate XML).

Run the HESA Validate XML process to validate the XML file generated by the Create XML File process. The HESA Validate XML process validates against the schema, it does not validate against the HESA business rules. You can validate the XML file against both the schema and the HESA business rules by using the HESA Validation Kit. After you run the HESA Validate XML process, refer to the log file to check for any validation errors.

XML Path/File Name

Enter the path and file name of the XML file that you want to validate.

Add Attachment

Click to browse to the XML file that you want to validate. You can browse your local drive and select a file.

Note: The upload process creates a files subdirectory to store and process the XML file. This subdirectory is created in the server directory location that is specified in the PS_SERVDIR system parameter in the Application Server/Process Scheduler configuration file psappsrv.cfg/psprcs.cfg. Ensure that PS_SERVDIR is set up with an appropriate value in the configuration file and that users have the correct permission to access the files subdirectory.

XSD Path/File Name

Enter the complete path and file name of the XSD file. The process uses the XSD file to validate your XML file.

The XSD file is available from the HESA website.

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Note: You must place the two related XSD files for CodeLists and DataTypes in the same directory as the XSD file being used for the XML validation. For example, if C08051.xsd is being used to validate the XML file and you have stored the C08051.xsd in /bur/hesa/psoft/shared/, then you must place C08051DataTypes.xsd and C08051CodeLists.xsd in the same directory /bur/hesa/psoft/shared/ because C08051.xsd references these two files.

Add Attachment

Click to browse to the XSD file. You can browse your local drive and select a file.

Note: The upload process creates a files subdirectory to store and process the XSD file. This subdirectory is created in the server directory location that is specified in the PS_SERVDIR system parameter in the Application Server/Process Scheduler configuration file psappsrv.cfg/psprcs.cfg. Ensure that PS_SERVDIR is set up with an appropriate value in the configuration file and that users have the correct permission to access the files subdirectory.

Note: If you are adding an XSD file using the Add Attachment button you must also ensure that any related XSD files (for example, Code Lists and Data Types) have also been added to the same location using the Add Attachment button.

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