



Assessment Data Source for Reporting Engine Requirements

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February 27, 2017

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Requirements

The goal of this document is to outline the requirements for adding an Assessment data source to the reporting engine. The assessment data source would be the third option in the data source selection dropdown. Document will cover the following topics:

- Entity definition
- Standard Filter Definition
- Advanced Filter Definition
- Reporting Engine UI changes

Open Questions:

Are there any new Assessment related auto completes we want to add to standard filter (assuming no right now)

Are there any custom Lists we want to add to the EzQuery Advanced Filters (also assuming no)

Page Standards

Each page will support user specific cultural date formatting

Each page will support language preferences, including: English, English – United Kingdom, English – Australian, Chinese – China, Francias – Canada, Italian – Italy, Portuguese – Brazil, Espanol – Mexico

All pages will use the new standard user interface page template with the common header.

Any new CSS stylings will be added to a global baseline stylesheet. No new stylings will be added to stylesheet.css or stylesheet-responsive.css

div#wrapper controls the width of each page

Ensure pages support User Impersonation functionality.

Pages continue to support Organization and Position Branding.

Help Text will point to HTML content that exists today.

Retain current role access to each “Add/Edit Feature” page according to portal XML files.

Modify the browser page name (that appears in the browser tabs) to match the displayed page name on all pages

Entity Definition

Assessment data will be related to a User and Location through their transcript, on a per assessment basis, question and answer data will be available. All cardinality decisions related to transcripts will also be used here, for example, the possibility of transcripts repeating if a User has multiple Position Codes, multiple Roles, and the possibility of a mini cross join exists if Position and Roles are both included in the result set. Queries will use the DISTINCT clause to limit duplicate records. All relevant Transcript attributes are included, as well as assessment specific attributes. Offering specific Transcript Attributes are excluded. Assessment attributes are at the end.

Table of Attributes follow:

Assessment View Attributes (Columns)

Table	Column Nam	Data Type	Length
Transcript	Username	nvarchar	200

Transcript	First Name	nvarchar	100
Transcript	Middle Name	nvarchar	100
Transcript	Last Name	nvarchar	100
Transcript	User Account Status	varchar	8
Transcript	User Profile Status	varchar	8
Transcript	Business Unit	nvarchar	510
Transcript	Business Unit Code	nvarchar	40
Transcript	Division	nvarchar	510
Transcript	Division Code	nvarchar	40
Transcript	Location	nvarchar	510
Transcript	Location Code	nvarchar	40
Transcript	Accountability Type	nvarchar	510
Transcript	Department	nvarchar	100
Transcript	Position Group	nvarchar	100
Transcript	Position Code	nvarchar	40
Transcript	Position Name	nvarchar	100
Transcript	User Group	nvarchar	510
Transcript	User Role	nvarchar	510
Transcript	Course Code	nvarchar	100
Transcript	Course Name	nvarchar	510
Transcript	LanguageID	int	4
Transcript	Enroll Date	smalldatetime	4
Transcript	Cancel Date	smalldatetime	4
Transcript	Accept Date	smalldatetime	4
Transcript	Launch Date	smalldatetime	4
Transcript	Due Date	smalldatetime	4
Transcript	Transcript Status	nvarchar	510
Transcript	Transcript StatusID	int	4
Transcript	Score Date	smalldatetime	4
Transcript	Expire Date	smalldatetime	4
Transcript	Effective Date	smalldatetime	4
Transcript	End Date	smalldatetime	4
Transcript	Last Update	datetime	8
Transcript	Waitlist Date	datetime	8
Transcript	Score	int	4
Transcript	Pre-Test Score	int	4
Transcript	Post-Test Score	int	4
Transcript	Percent Complete	float	8
Transcript	Score Code	nchar	2
Transcript	Score Type	nvarchar	510
Transcript	Transcript Source Code	nvarchar	20
Transcript	Transcript Source	nvarchar	510
Transcript	Transcript Type	nvarchar	100

Transcript	Major	nvarchar	100
Transcript	Course Topic	nvarchar	800
Transcript	Delivery Method	nvarchar	200
Transcript	Cost	nvarchar	8000
Transcript	Credit	float	8
Transcript	Bill Status	nvarchar	100
Transcript	Has Admin Overridden Conflict	bit	1
Transcript	Course Owner Organization	nvarchar	510
Transcript	Owner Org ID	int	4
Transcript	Owner Structure ID	int	4
Transcript	Days Past Due	int	4
Transcript	Email	nvarchar	510
Transcript	Attended	bit	1
Transcript	Request Required	bit	1
Transcript	Attempts	smallint	2
Transcript	Transcript Note	nvarchar	4000
Transcript	Cancel Note	nvarchar	4000
Transcript	Failure Note	nvarchar	4000
Transcript	Incomplete Note	nvarchar	4000
Transcript	Transcript ID	int	4
Transcript	Is Primary	varchar	5
Transcript	Transcript Credit	varchar	10
Transcript	UserProfileID	int	4
Transcript	PositionID	int	4
Transcript	RoleID	int	4
Transcript	ProfileOrgID	int	4
Transcript	ProfileStructureID	int	4
Transcript	ManagerProfileID	int	4
Transcript	AccType	varchar	255
Transcript	GroupID	int	4
Transcript	CourseID	int	4
Assessment	Attempt #	number	4
Assessment	Test Score	number	
Assessment	Objective	text	
Assessment	Question Type	text	
Assessment	Question	text	
Assessment	Student Answer	text	
Assessment	Correct (Yes/No)	text	

Standard Filter Definition

Following is a list of standard filters that will be available to run for Assessment Reports. As with Transcript and Certification reporting, standard filters are available to end users running the report and their selection will be saved and viewed with the Results. All current functionality related to rendering of standard filters will be supported. Following is a table of standard filters to be available to Assessment reports:

Assessment Standard Filter Attributes

Criteria	Type	Data Type	Operand	Control Type
Course	text	String	Is	autocomplete
Course	text	String	Isn't	autocomplete
Transcript Status	text	String	Is	select
Transcript Status	text	String	Isn't	select
Position	text	String	Is	autocomplete
Position	text	String	Isn't	autocomplete
Position	text	String	Was	autocomplete
Organization	text	String	In Exact Organization	autocomplete
Organization	text	String	Not In Exact Organization	autocomplete
Organization	text	String	In Hierarchy	autocomplete
Organization	text	String	Not In Hierarchy	autocomplete
Username	text	String	Equal	autocomplete
Username	text	String	Not Equal	autocomplete
Username	text	String	Contains	autocomplete
Username	text	String	Does Not Contain	autocomplete
Username	text	String	Starts With	autocomplete
User Group	text	String	Is	autocomplete
User Group	text	String	Isn't	autocomplete
Enroll Date	date	DateTime	Custom	date
Enroll Date	date	DateTime	Yesterday	date
Enroll Date	date	DateTime	Today	date
Enroll Date	date	DateTime	Last 7 Days	date
Enroll Date	date	DateTime	Last 30 Days	date
Enroll Date	date	DateTime	Last 90 Days	date
Enroll Date	date	DateTime	Last 6 Months	date
Enroll Date	date	DateTime	Last 12 Months	date
Enroll Date	date	DateTime	Current Year	date
Enroll Date	date	DateTime	Current Quarter	date
Enroll Date	date	DateTime	Current Month	date
Enroll Date	date	DateTime	Current Week	date
Enroll Date	date	DateTime	Last Year	date

Enroll Date	date	DateTime	Last Quarter	date
Enroll Date	date	DateTime	Last Month	date
Enroll Date	date	DateTime	Last Week	date
Cancel Date	date	DateTime	Custom	date
Cancel Date	date	DateTime	Yesterday	date
Cancel Date	date	DateTime	Today	date
Cancel Date	date	DateTime	Last 7 Days	date
Cancel Date	date	DateTime	Last 30 Days	date
Cancel Date	date	DateTime	Last 90 Days	date
Cancel Date	date	DateTime	Last 6 Months	date
Cancel Date	date	DateTime	Last 12 Months	date
Cancel Date	date	DateTime	Current Year	date
Cancel Date	date	DateTime	Current Quarter	date
Cancel Date	date	DateTime	Current Month	date
Cancel Date	date	DateTime	Current Week	date
Cancel Date	date	DateTime	Last Year	date
Cancel Date	date	DateTime	Last Quarter	date
Cancel Date	date	DateTime	Last Month	date
Cancel Date	date	DateTime	Last Week	date
Due Date	date	DateTime	Custom	date
Due Date	date	DateTime	Yesterday	date
Due Date	date	DateTime	Today	date
Due Date	date	DateTime	Last 7 Days	date
Due Date	date	DateTime	Last 30 Days	date
Due Date	date	DateTime	Last 90 Days	date
Due Date	date	DateTime	Last 6 Months	date
Due Date	date	DateTime	Last 12 Months	date
Due Date	date	DateTime	Next 7 Days	date
Due Date	date	DateTime	Next 30 Days	date
Due Date	date	DateTime	Next 90 Days	date
Due Date	date	DateTime	Next 6 Months	date
Due Date	date	DateTime	Next 12 Months	date
Due Date	date	DateTime	Current Year	date
Due Date	date	DateTime	Current Quarter	date
Due Date	date	DateTime	Current Month	date
Due Date	date	DateTime	Current Week	date
Due Date	date	DateTime	Last Year	date
Due Date	date	DateTime	Last Quarter	date
Due Date	date	DateTime	Last Month	date
Due Date	date	DateTime	Last Week	date
Due Date	date	DateTime	Next Year	date
Due Date	date	DateTime	Next Quarter	date
Due Date	date	DateTime	Next Month	date

Due Date	date	DateTime	Next Week	date
Score Date	date	DateTime	Custom	date
Score Date	date	DateTime	Yesterday	date
Score Date	date	DateTime	Today	date
Score Date	date	DateTime	Last 7 Days	date
Score Date	date	DateTime	Last 30 Days	date
Score Date	date	DateTime	Last 90 Days	date
Score Date	date	DateTime	Last 6 Months	date
Score Date	date	DateTime	Last 12 Months	date
Score Date	date	DateTime	Current Year	date
Score Date	date	DateTime	Current Quarter	date
Score Date	date	DateTime	Current Month	date
Score Date	date	DateTime	Current Week	date
Score Date	date	DateTime	Last Year	date
Score Date	date	DateTime	Last Quarter	date
Score Date	date	DateTime	Last Month	date
Score Date	date	DateTime	Last Week	date
Expiration Date	date	DateTime	Custom	date
Expiration Date	date	DateTime	Yesterday	date
Expiration Date	date	DateTime	Today	date
Expiration Date	date	DateTime	Last 7 Days	date
Expiration Date	date	DateTime	Last 30 Days	date
Expiration Date	date	DateTime	Last 90 Days	date
Expiration Date	date	DateTime	Last 6 Months	date
Expiration Date	date	DateTime	Last 12 Months	date
Expiration Date	date	DateTime	Next 7 Days	date
Expiration Date	date	DateTime	Next 30 Days	date
Expiration Date	date	DateTime	Next 90 Days	date
Expiration Date	date	DateTime	Next 6 Months	date
Expiration Date	date	DateTime	Next 12 Months	date
Expiration Date	date	DateTime	Current Year	date
Expiration Date	date	DateTime	Current Quarter	date
Expiration Date	date	DateTime	Current Month	date
Expiration Date	date	DateTime	Current Week	date
Expiration Date	date	DateTime	Last Year	date
Expiration Date	date	DateTime	Last Quarter	date
Expiration Date	date	DateTime	Last Month	date
Expiration Date	date	DateTime	Last Week	date
Expiration Date	date	DateTime	Next Year	date
Expiration Date	date	DateTime	Next Quarter	date
Expiration Date	date	DateTime	Next Month	date
Expiration Date	date	DateTime	Next Week	date

Advanced Filter Definition

Advanced Filters are available to administrators and hidden from end users running the reports. Advanced filters are maintained in the EZQuery meta-data and presented using EZQuery UI components. They have their own definitions for drop down selection and control presentation. Following is a table of advanced filters and options that will be available to Assessment reports:

Assessment Advanced Filter Attributes

Base Data	C	R	S	Description	Lookup Table Type	Table Name	Operators
Course	N	Y	Y	Course Catalog			StartsWith, Contains, NotContains, NotInSubQuery, Is
Course	N	Y	Y	Course Code			StartsWith, Contains, NotContains, Not
Course	N	Y	Y	Course Name			Equal, InList, NotE
Course	Y	N	N	Course Name	CUSTOMLIST	Courses	Equal, InList, NotE
Course	N	Y	N	Course Topic			Equal, InList, NotE
Course	Y	N	Y	Course Topic	CUSTOMLIST	Course Topic	Equal, InList, NotE
Course	N	Y	Y	Credit			Equal, Between, L, GreaterOrEqual, I, MaximumOfAttr, IsNotNull
Course	Y	Y	Y	Delivery Method	CUSTOMLIST	Delivery Methods	Equal, InList, NotE
Course	Y	N	Y	Instructor Name	CUSTOMLIST	Instructors	Is, Isn't, InList, No
Course	N	Y	N	Instructor Name			Is, Isn't, InList, No
Course	N	Y	Y	Major			Equal, InList, NotE
Course	Y	N	N	Major	CUSTOMLIST	Majors	Equal, InList, NotE
Course	Y	Y	Y	Offering ID			Equal, InList, NotE
Course	Y	Y	Y	Offering Start			DatePeriodPrecise, CurrentWeek, Cur, Last7Days, Last30, Last12Months, La, Next7Days, Next3, Next12Months, N, NextYear
Course	Y	Y	Y	Offering End			DatePeriodPrecise, CurrentWeek, Cur, Last7Days, Last30, Last12Months, La, Next7Days, Next3, Next12Months, N, NextYear

Organization	N	Y	Y	Business Unit			Equal, InList, NotE
Organization	Y	N	N	Business Unit	CUSTOMLIST	Business Units	Equal, InList, NotE
							StartsWith, Conta
							NotContains, Not
Organization	N	Y	Y	Business Unit Code			NotInSubQuery, I
Organization	N	Y	N	Department			Isn't, Is, WasinDep
Organization	Y	N	Y	Department	CUSTOMLIST	Department	Is, Isn't, WasinDep
Organization	N	Y	Y	Division			Equal, InList, NotE
Organization	Y	N	N	Division	CUSTOMLIST	Divisions	Equal, InList, NotE
							StartsWith, Conta
							NotContains, Not
Organization	N	Y	Y	Division Code			NotInSubQuery, I
Organization	N	Y	N	Facility			Equal, InList, NotE
Organization	Y	N	Y	Facility	CUSTOMLIST	Facilities	Equal, InList, NotE
							StartsWith, Conta
Organization	N	Y	Y	Facility Code			NotContains, Not
Organization	N	Y	N	Hierarchy			Equal, InList, NotE
						Business	
Organization	Y	N	Y	Hierarchy	CUSTOMLIST	Hierarchy	Equal, InList, NotE
Organization	N	Y	Y	Locale			Equal, InList, NotE
Organization	Y	N	N	Locale	CUSTOMLIST	Locales	Equal, InList, NotE
Organization	N	Y	Y	Location			Equal, InList, NotE
Organization	Y	N	N	Location	CUSTOMLIST	Locations	Equal, InList, NotE
							StartsWith, Conta
							NotContains, Not
Organization	N	Y	Y	Location Code			NotInSubQuery, I
Position	N	Y	Y	Position			Is, Isn't, WasinPos
Position	Y	N	Y	Position	CUSTOMLIST	Position	Is, Isn't, WasinPos
							StartsWith, Conta
Position	N	Y	Y	Position Code			NotContains, Not
Position	Y	N	Y	Position Group	CUSTOMLIST	PositionGroup	Is, Isn't, InList, No
Position	N	Y	N	Position Group			Is, Isn't, InList, No
							CurrentMonth, Cu
							DatePeriodPrecise
							Last12Months, La
							Last90Days, LastM
							Next12Months, N
Transcript	N	Y	Y	Accept Date			Next90Days, Next
Transcript	N	Y	Y	Attended			IsY, NotY
							StartsWith, Conta
							NotContains, Not
Transcript	N	N	Y	Bill Status			NotInSubQuery, I
							DatePeriodPrecise
							CurrentWeek, Cur
Transcript	Y	Y	Y	Cancel Date			Last7Days, Last30

Transcript	N	Y	Y	Cancel Note	Last12Months, La StartsWith, Conta NotContains, Not NotInSubQuery, I Equal, Between, L GreaterOrEqual, I MaximumOfAttr, IsNotNull
Transcript	N	Y	Y	Days Past Due	DatePeriodPrecise CurrentWeek, Cur Last7Days, Last30 Last12Months, La Next7Days, Next3 Next12Months, N NextYear
Transcript	Y	Y	Y	Due Date	DatePeriodPrecise CurrentWeek, Cur Last7Days, Last30 Last12Months, La
Transcript	Y	Y	Y	Enroll Date	DatePeriodPrecise CurrentWeek, Cur Last7Days, Last30 Last12Months, La
Transcript	Y	Y	Y	Expire Date	DatePeriodPrecise CurrentWeek, Cur Last7Days, Last30 Last12Months, La
Transcript	N	Y	Y	Failure Note	StartsWith, Conta NotContains, Not NotInSubQuery, I
Transcript	N	Y	Y	Has Admin Overridden Conflict	IsY, NotY
Transcript	N	Y	Y	Incomplete Note	StartsWith, Conta NotContains, Not NotInSubQuery, I
Transcript	Y	Y	Y	Last Update	DatePeriodPrecise CurrentWeek, Cur Last7Days, Last30 Last12Months, La Next7Days, Next3 Next12Months, N NextYear
Transcript	N	Y	Y	Launch Date	CurrentMonth, C DatePeriodPrecise Last12Months, La Last90Days, LastM Next12Months, N Next90Days, Next
Transcript	N	Y	Y	Pre-Test Score	Equal, Between, L GreaterOrEqual, I MaximumOfAttr, IsNotNull

Transcript	N	Y	Y	Post-Test Score		Equal, Between, L
Transcript	N	N	Y	Request Required		GreaterOrEqual, I MaximumOfAttr, IsNotNull IsY, NotY
Transcript	N	Y	Y	Score		Equal, Between, L GreaterOrEqual, I MaximumOfAttr, IsNotNull DatePeriodPrecise CurrentWeek, Cur Last7Days, Last30 Last12Months, La
Transcript	Y	Y	Y	Score Date		
Transcript	Y	Y	Y	Transcript Credit	ConstListValueEditor208	Equal, InList, NotE
Transcript	N	Y	Y	Transcript ID		Equal, Between, L GreaterOrEqual, I MaximumOfAttr, IsNotNull StartsWith, Conta NotContains, Not NotInSubQuery, Is
Transcript	N	Y	Y	Transcript Note		
Transcript	N	Y	N	Transcript Status		Is, Isn't, InList, No StartsWith, Conta NotContains, Not NotInSubQuery, Is
Transcript	N	Y	Y	Transcript Source		StartsWith, Conta NotContains, Not NotInSubQuery, Is
Transcript	N	Y	Y	Transcript Type		Equal, Between, L GreaterOrEqual, I MaximumOfAttr, IsNotNull DateWithinToday DateWithinPrevW DateWithinPrevM DateWithinPrevYe DatePeriodPrecise
Transcript	N	Y	Y	Waitlist Date		
Transcript	N	N	N	Transcript Source Code		StartsWith, Conta NotContains, Not NotInSubQuery, Is
Transcript	N	N	N	Score Type		StartsWith, Conta NotContains, Not NotInSubQuery, Is
Transcript	N	N	Y	Score Code		StartsWith, Conta NotContains, Not NotInSubQuery, Is
Transcript	N	N	N	Percent Complete		Equal, Between, L GreaterOrEqual, I

							MaximumOfAttr, IsNotNull
							Equal, Between, L
							GreaterOrEqual, I
							MaximumOfAttr, IsNotNull
Transcript	N	N	N	Attempts Used			IsNotNull
Transcript	Y	N	N	Transcript Status	CUSTOMLIST	TranscriptStatus	Is, Isn't, InList, No
							Equal, Between, L
							GreaterOrEqual, I
							MaximumOfAttr, IsNotNull
Transcript	N	N	N	Transcript StatusID			IsNotNull
							DatePeriodPrecise
							CurrentWeek, Cur
							Last7Days, Last30
							Last12Months, La
							Next7Days, Next3
							Next12Months, N
User	Y	Y	Y	Effective Date			NextYear
							StartsWith, Conta
User	Y	Y	Y	Email			NotContains, Not
							DatePeriodPrecise
							CurrentWeek, Cur
							Last7Days, Last30
							Last12Months, La
							Next7Days, Next3
							Next12Months, N
User	Y	Y	Y	End Date			NextYear
							StartsWith, Conta
User	Y	Y	Y	First Name			NotContains, Not
							StartsWith, Conta
User	Y	Y	Y	Last Name			NotContains, Not
							StartsWith, Conta
							NotContains, Not
User	N	Y	N	Primary Profile			NotInSubQuery, I
							StartsWith, Conta
User	Y	Y	Y	Username			NotContains, Not
				User Account			
User	N	Y	N	Status			Equal, NotEqual, I
				User Account		User Account	
User	Y	N	Y	Status	CUSTOMLIST	Status	Equal, NotEqual, I
User	Y	N	Y	User Group	CUSTOMLIST	UserGroup	Is, Isn't, InList, No
User	N	Y	Y	User Group			Is, Isn't, InList, No
User	Y	N	Y	User Profile			IsPrimary, Isn'tPri
User	N	Y	N	User Profile Status			Equal, InList, NotE
						User Account	
User	Y	N	Y	User Profile Status	CUSTOMLIST	Status	Equal, InList, NotE

User	Y	N	Y	User Role	CUSTOMLIST	Role	Is, Isn't, WasinRol
User	N	Y	N	User Role			Is, Isn't, WasinRol
User	N	N	Y	Middle Name			StartsWith, Conta NotContains, Not
User Profile	N	N	N	UserProfileID			Equal, InList, NotE NotInSubQuery, Is
User Profile	N	N	N	ProfileStructureID			Equal, InList, NotE NotInSubQuery
User Profile	N	N	N	ManagerProfileID			Equal, Between, L GreaterOrEqual, I MaximumOfAttr, IsNotNull
User Profile	N	N	Y	AccType			StartsWith, Conta NotContains, Not NotInSubQuery, Is
Role	N	N	N	RoleID			Equal, InList, NotE NotInSubQuery, Is
Language	N	N	N	LanguageID			Equal, InList, NotE Equal, Between, L GreaterOrEqual, I MaximumOfAttr, IsNotNull
Standard Filters	Y	Y	Y	CourseID			Equal, InList, NotE NotInSubQuery, Is
Standard Filters	N	N	N	PositionID			Equal, InList, NotE
Standard Filters	N	N	N	GroupID			Equal, InList, NotE
Standard Filters	N	N	N	ProfileOrgID			Equal, InList, NotE NotInSubQuery, Is
Assessment	Y	Y	Y	Attempt #			Equal, InList, NotE Equal, Between, L GreaterOrEqual, I IsNotNull
Assessment	Y	Y	Y	Test Score			StartsWith, Conta NotContains, Not
Assessment	Y	Y	Y	Objective			Equal, InList, NotE
Assessment	Y	Y	Y	Question Type			StartsWith, Conta NotContains, Not
Assessment	Y	Y	Y	Question			StartsWith, Conta NotContains, Not
Assessment	Y	Y	Y	Student Answer			StartsWith, Conta NotContains, Not
Assessment	Y	Y	Y	Correct (Yes/No)			Equal

Reporting Engine UI Changes

Other than adding the new entity type to the entity drop-down list and making sure existing controls support the new entity metadata, there are no anticipated changes to the Reporting UI. This could change if we need to add:

- New Standard filter auto-complete types (for example, Question and Objective)
- Possibly new Custom Lists for the advanced filter in the EZQuery section will need template work.